

## South Brent and District Caring

Registered Charity no: 1204911

Principal address: South Brent Old School Community Centre,  
Totnes Road, South Brent TQ10 9BP

### **Report of the Trustees for the Year Ended 31<sup>st</sup> December 2024**

The Trustees have pleasure in presenting their report and the financial statements of the Charity for the period ended 31<sup>st</sup> December 2024.

#### **Objects and public benefit**

The Charitable Objects of South Brent and District Caring are set out in the Constitution signed 30<sup>th</sup> August 2023 and are as follows:-

- (1) The relief of those persons in need living or residing in the Parish of South Brent and the immediate neighbouring parishes.
- (2) To promote social inclusion for the public benefit among persons, who are excluded from society because they are elderly or by reason of poor mental health, limited financial means, failing health, reduced mobility, or a full-time caring commitment where one is needed.

The Trustees have paid due regard to the guidance contained in the Charity Commission's general guidance on public benefit in reviewing the work undertaken during the year.

#### **Conversion to a Charitable Incorporated Organisation**

During 2024 the Trustees have merged South Brent & District Caring (Charity number: 1150875) into this CIO of the same name (Charity number: 1204911). For the most part financial activity moved over to the new CIO 1<sup>st</sup> May 2024 but this financial report covers the first period of the new CIO from 30<sup>th</sup> August 2023 when it was formed to the end of the financial period on 31<sup>st</sup> December 2024. The Trustees Annual Report covers the period 1<sup>st</sup> January 2024 to 31<sup>st</sup> December 2024 and is a consolidated view of all the Charity's work over that period.

#### **How the activities have delivered the public benefit**

The Charity takes client referrals from family, friends, health-care professionals as well as clients referring themselves. During the year we have seen a large 18% increase in client numbers, while volunteer numbers have remained steady.

<b>People</b>	<b>End of year numbers</b>
Clients	275
Volunteers	161
Friends of Caring	207
Age Range	24 - 101

Reported people numbers only include those that have been active during the year.

The table below refers to one-to-one services, Befriending has helped 18 clients, some of this is carer respite short term befriending. Transport has increased by 46% following a year on year trend; the service enables clients to attend medical appointments while transport to our regular (CM/LC/FDWD) social events has doubled from last year enabling more isolated people to attend these groups. This is a really beneficial service but logistically our most time consuming. This year we have had the support of an office volunteer to help run this service. This volunteer alone has given us 240 hours of support in 2024. We currently have around 21 transport volunteers with a core of 15 who are regular drivers.

Bespoke Personal Support is generally Operation Christmas and anything outside of our 'normal remit' it was delivered to 121 individuals.

Trips were three in number delivered to 37 unique clients again up on last year, and very popular with excellent feedback, included our beach trip and the local Christmas pantomime.

<b>Services</b>	<b>2024 delivery numbers</b>
Befriending	426
Transport	543
Signposting & informing	68
Transport to CM/LC/FDWD	98
Form Filling & Admin	30
Prescription Collection	28
Trips	3
Bespoke Personal Support	32

Regular social and well-being sessions have continued to run weekly and remained very popular. To sustain the quality and availability of these regular services even more volunteers have kindly stepped in through the year to help the groups and the office run smoothly and the Trustees wish to thank them for their time and dedication. Foot care sessions have increased from 16 to 23 through the year as this service becomes ever more popular. Overall the total number of group sessions was 244 an increase of 33 on last year. The attendance numbers for the year were as follows:

<b>Group sessions</b>	<b>Number of sessions</b>	<b>Average attendance</b>
Coffee morning	49 up	11
Walk & Talk	51 up	8
Lunch Club	47 up	26 up
Friendsday Wednesday	49 up	14 up
Compassionate café	25	5
Foot care	23 up	11
Trips	3	18 up

## Evaluation

Expected beneficiary outcomes are associated with each service and accumulate through the year each time the service is delivered. The totals are:

Outcome	Incidences in 2024
Reduced Isolation	4,650 up 33%
Improved health and emotional well being	4,867 up 34%
Increased choice and control	2,298 up 72%
Improved quality of life	4,902 up 33%
Freedom from discrimination and harassment	3,780 up 20%
Maintaining personal dignity	4,300 up 25%
Making a positive contribution	2,135 up 14%
Economic well being	2,827 up 26%

## Office Enquiry Statistics

The figures below are for the period January<sup>1</sup> to December 2024. Office footfall is significantly increased if compared to the previous years total of 2445 contacts, a 27.5% increase.

	No	Total by different type of contact
<b>Source of contact</b>		
Phone	1092	3116
Visit	1902	
Home visit & other	122	
<b>Of these...</b>		<b>Total Contacts</b>
New Faces	328	3116
Repeat	1713	
Volunteer	765	
Professional	213	
Trustees	97	

## Warm Space/The Hub Jan 24 -Dec 24

Total days recorded	Total users (visits)	Total volunteer sessions	Average daily users	Average volunteer per day
252 up	2716 up	521 down	10	2 down

The Hub is open from 9:30 –12:30 weekdays and hosts a number of activities and also functions as an open space for connection and a cuppa. The above includes Walk and Talk, Coffee Morning and Compassionate Café as groups using The Hub, they are counted in earlier figures. To see the other Hub users outside of those groups, the stripped back figure of total user visits are 1756, which is still a significant number of visits. This year saw a shift from

<sup>1</sup> Statistics had been collated to meet trustee meeting reporting periods, and so for 2024 an average figure has been taken for the period from 1st Jan until the first trustee meeting (23rd Feb) as the original reporting period stretched back to November 2023.

volunteers assisting all week as a warm space/hub to mostly for organised sessions. Taking off the Compassionate Café, Coffee Morning and Walk and Talk volunteer sessions leaves 57 volunteer sessions that are purely supporting The Hub.

## **Governance**

The Care Services Co-ordinator reports six times a year to the Management Committee and four times a year to the Trustee board. Two Trustees sit on the Management Committee, one of which is the Chairman of the committee.

Susanne Archard as Care Services Coordinator and Lucy Jonas as Operations Manager have remained in their roles throughout the year.

During the financial period and subsequently to date the following Trustees held office:

- Jennie Hazell
- Carolyn Hedges (Resigned 21<sup>st</sup> November 2024)
- James Hill
- Elaine Musgrave (Elected 21<sup>st</sup> November 2024)
- John Rawlinson
- Graham Royle (Acting Chairman)
- David Schura
- Lindsey Stewart

No Trustee expenses were claimed during the year.

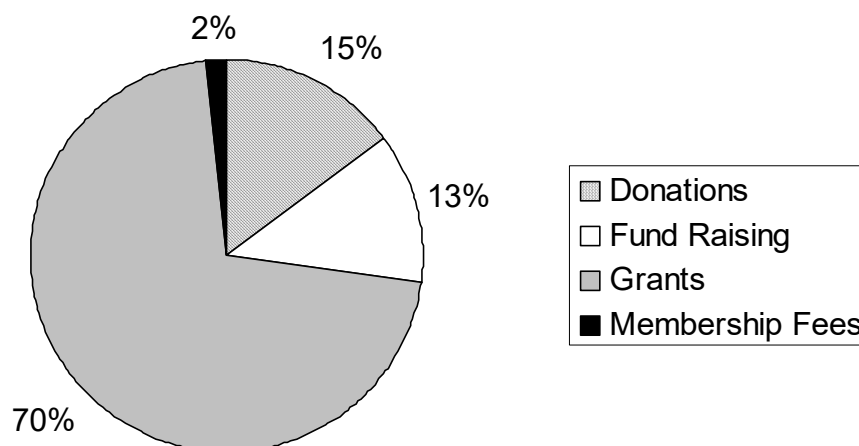
The Charity has become noticeably busier and new volunteers have risen to the challenge, the Trustees have also agreed to increase paid support workers hours. In 2023 contracted hours amounted to 1.33 equivalent full time (EFT) workers in 2024 this rose to 1.46 EFT and in 2025 it is expected to rise to 1.65 EFT.

## **Principal Funding Sources**

During the financial period grant funding has been gratefully received from

Studd Charitable Trust, The Freemasons: Dartmoor Lodge, South Brent Feoffees (specifically for the residents of South Brent Parish), South Brent Parish Council, Devon Community Car Forum, Sustainable South Brent, Livewell Foundation, Garfield Weston Foundation, Soundart Radio and National Lottery Awards for All England. The Trustees wish to express their sincere gratitude for this funding and the support and recognition given to the work the Charity undertakes.

The chart on the next page shows the four main sources of revenue.



The Trustees acknowledge and thank the many private individuals who donate so generously through regular giving. Not only is this an enormous help to the sustainability of the Charity but a tangible appreciation of the benefit South Brent & District Caring delivers to the local community.

### Reserves policy

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a minimum level of four months and a maximum of twelve months of unrestricted expenditure. At the end of the financial period the Trustees estimate the Charity holds 10 months operating costs in unrestricted reserves.

### Risk review

The Trustees continue to review risk scoring and mapping the Charity's exposure based on the following risk appetite profile:

- Operational Risk - Minimal
- Conduct Risk - Cautious
- Regulatory Risk - Minimal
- Solvency Risk - Minimal

The Trustees continue to manage risk and review exposure to changes in the operating environment.

### Responsibilities of the Trustees

All new Trustees are vetted and receive the latest version of "The Essential Trustee" CC3, the Deed of Trust and an outline of their responsibilities.

Signed on behalf of the Board

  
 .....  
 Graham Royle (Acting Chairman)

Dated... 5/7/2025 .....

## **Independent Examiner's Report to the Trustees of South Brent & District Caring**

I report on the accounts of the Charity for the year ended 31<sup>st</sup> December 2024 set out on pages 8 to 9.

### **Respective responsibilities of Trustees and Examiner**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act
- to state whether particular matters have come to my attention.

### **Basis of independent examiner's statement**

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the next statement.

### **Independent examiner's statement**

In connection with my examination, no matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

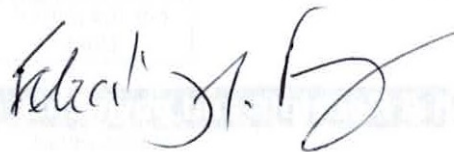
- to keep accounting records in accordance with section 130 of the 2011 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name: Mrs Felicity M Ferry

Signed:

A handwritten signature in black ink, appearing to read 'Felicity M. Ferry', written over a faint blue rectangular stamp.

Date:

8 August 2025

Relevant professional qualification or body: ACA

Address: Oakmeade  
Exeter Road  
South Brent  
TQ10 9JP



CHARITY COMMISSION  
FOR ENGLAND AND WALES

South Brent & District Caring

1204911

## Receipts and payments accounts

CC16a

For the period  
from

25 Sep 2023

To


31 Dec 2024

### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Incoming resources from generated funds	-	-	-	-	-
Voluntary income	24,887	-	-	24,887	-
Activities for generating funds	600	-	-	600	-
Investment income	-	-	-	-	-
Incoming resources from charitable activities	-	-	-	-	-
Transport	298	-	-	298	-
Client activities & services	165	-	-	165	-
Miscellaneous	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>25,950</b>	<b>-</b>	<b>-</b>	<b>25,950</b>	<b>-</b>
<b>A2 Asset and investment sales, (see table).</b>					
Merger asset transfer	77,763	-	-	77,763	-
	-	-	-	-	-
<b>Sub total</b>	<b>77,763</b>	<b>-</b>	<b>-</b>	<b>77,763.00</b>	<b>-</b>
<b>Total receipts</b>	<b>103,713</b>	<b>-</b>	<b>-</b>	<b>103,713</b>	<b>-</b>
<b>A3 Payments</b>					
Costs of Generating Funds					
Fundraising costs	210	-	-	210	-
Charitable activities					
Client activities & service expenses	5,108	-	-	5,108	-
Transport	292	-	-	292	-
Care coordination & admin services	32,828	-	-	32,828	-
Office	3,242	-	-	3,242	-
Volunteer support	1,187	-	-	1,187	-
Other resources expended					
Office equipment	36	-	-	36	-
Miscellaneous	3	-	-	3	-
<b>Sub total</b>	<b>42,906</b>	<b>-</b>	<b>-</b>	<b>42,906</b>	<b>-</b>
<b>A4 Asset and investment purchases. (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>42,906</b>	<b>-</b>	<b>-</b>	<b>42,906</b>	<b>-</b>
<b>Net of receipts/(payments)</b>	<b>60,807</b>	<b>-</b>	<b>-</b>	<b>60,807</b>	<b>-</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Cash funds this year end</b>	<b>60,807</b>	<b>-</b>	<b>-</b>	<b>60,807</b>	<b>-</b>



## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Current Account	5,807	-	-
	Savings account	55,000	-	-
	Petty Cash	-	-	-
	<b>Total cash funds</b>	<b>60,807</b>	<b>-</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
<b>B2 Other monetary assets</b>	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
			G. E. ROYLE	5/7/25