



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From May 2022
Period end date

Period start date To 30 April 2023

Charity name: The Caroline Walker Trust

Charity registration number:

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Caroline Walker Trust promotes public health and, in doing so, protects the quality of food for public health.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>The main activities of the trust this year have included.</p> <ul style="list-style-type: none">- An Award Scheme held annually to promote public benefit by means of good food and nutrition.- Lectures on subjects related to the object of the charity (held online due to COVID-19).- The provision of resources, articles, and publications to provide evidence on food, nutrition, diet, and health continue to be produced by the Caroline Walker Trust. These include the;<ul style="list-style-type: none">o Eating Well guides.o Afternoon tea and snacks recipe bookso Resources for our dedicated afternoon tea website for various audiences. These include icons, articles, factsheets, infographics, menus, podcasts, research, FQA's, and top tips.- Collection and library of afternoon tea and snack recipes and photos online.- Food and cookery Demonstrations to vulnerable groups this year included healthy eating for snacks and afternoon tea as part of our World's Healthiest Afternoon Tea series.- The Fundraising Afternoon Tea event is held annually. Unfortunately, this event has been postponed due to Covid.- Undertaking research and compiling information on nutrition, diet and consumption. A Diversity research project (funded by a grant) to evaluate and compile information concerning nutrition, diet and consumption within diverse communities in Birmingham commenced in March 2023.- Research for the publication of our books and promotion of our annual awards was undertaken

		by students.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have complied with the duty in Section 4 of the Charities Act 2006 to have due regard to the public benefit guidance published by the Charity Commission in determining the activities undertaken by the charity.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant-making	Para 1.38	The trust did not make any grants to other organisations or individuals between May 2022 and April 2023
Policy on social investment, including program-related investment	Para 1.38	Not applicable
Contribution made by volunteers	Para 1.38	<p>The volunteers of the Trust included the following.</p> <ul style="list-style-type: none"> - Trustees - Committee members - Annual Award judging panels - Student interns - Summer student placements - Consumer Testers <p>They have all contributed enormous amounts of time to drive the charity forward per its objectives.</p>
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>Over the past year...</p> <p>Updating publications The charity has begun updating the foremost Eating Well series to the new health guidelines and NICE standards, starting with the Eating Well: First Year of Life Practical Guide. These have included; The Eating Well First Year of Life Practical Guide is used by families, child carers, children's centres, community food workers, health visitors, social workers, registered nutritionists, dietitians, paediatricians, and other health professionals. The revision of this guide is near completion and will be loaded onto the CWT website and Amazon to allow customers to download it as a PDF or purchase a hard copy. The Eating Well: Children and Adults with Learning Disabilities is currently being considered for revision. An initial exploratory review found that a more</p>

		<p>extensive rewrite would be needed to update this since it was first published 15 years ago. This Eating Well Guide is aimed at carers to support nutrition in an evidence-based manner whilst acknowledging the challenges associated with nutrition and disability. People with an LD experience poorer health than the general population and have more complex nutrition needs, with higher levels of obesity, undernutrition, disordered eating and dysphagia. There needs to be more tailored, evidence-based information which enables people to understand the foods that improve their health. Educating individuals on their specific health needs causes healthier food choices, thus improving dietary quality and health outcomes. Instructing people on a healthy diet allows them freedom in their choice of meals/snacks, improving mealtime satisfaction, which is often lacking for some individuals, e.g., with dysphagia. This publication will positively benefit the health of over 100,000 individuals with a disability. CWT will work with the BDA learning disabilities subgroup and other leading experts to revise the publication.</p> <p>Online Lecturers</p> <p>The first online lecture was held in June 2022. The theme was plant-based diets for children, and the speaker was Paula Hallam, a specialist Paediatric Dietitian. Over 20 health professionals and carers attended the lecture online. Providing valuable information on plant-based eating comes at the forefront of many families' move towards reduced meat and dairy consumption, particularly during a cost-of-living crisis. Protecting children's health by informing them of potential nutritional inadequacies and providing solutions to avoid malnutrition is vital in filling the gap between ethos and practical implementation.</p> <p>World's Healthiest Afternoon Tea</p> <p>CWT has a dedicated committee which works to combat malnutrition for children after school. The World's Healthiest Afternoon Tea aims to raise funds to support afterschool, youth and sports clubs providing and promoting healthier food after school. Snacks after school can contribute to at least 20% of children's daily intake. For many children living in poverty, afterschool snacks might also be their last 'meal' of the day. The WHAT programme aims to provide resources and food-based activities for afterschool clubs to highlight the need for a nutrient-dense, healthier snack.</p> <p>This year, we have</p> <ul style="list-style-type: none"> - Piloted several demonstrations and workshops at the St Andrews Youth Club, the oldest after-school youth club in the UK. - Mentored 10 nutrition and dietetic degree students from UK universities from 2022 to 2023 to support the publication of various resources, research and recipes. - Our student interns in our World's Healthiest Afternoon Tea mentoring programme have
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		<p>produced hundreds of recipes and resources on healthier snacks for various vulnerable groups which are downloadable from a dedicated website.</p> <ul style="list-style-type: none"> - The WHAT programme included students from the University College of Dublin, Galway-Mayo Institute of Technology, Winchester and London Metropolitan. We also received students this year for a summer placement from Bath Spa University, the University of Westminster, and the University of Chester. <p>Annual Awards</p> <ul style="list-style-type: none"> - Since 1990, the CWT Awards have recognised and celebrated distinctive and outstanding work in promoting public health that maintains and advances food and nutrition standards. - Every year, CWT sees up to 40 nominations for several award categories. . - The theme chosen for the 2022 awards was Sustainable Food, emphasising food and nutrition projects that help sustain our health and environment. - Nominations for the following categories were open on the 23 September 2022. <ul style="list-style-type: none"> o Charity Food Campaigner of the Year 2022 o Nutritionist of the Year o Freelance Nutritionist of the Year o Lecturer of the Year - Nominations were received from around the country, with a short-list announced in March 2023. - Attendance to the Annual Awards each year is in excess of 60 attendees. <p>Work Commissioned by Birmingham City Council</p> <ul style="list-style-type: none"> - The CWT was successful in winning a bid from the Birmingham City Council to enhance the current Eatwell guidance for its diverse population. - Work commenced in March 2022 - Birmingham's increasing population of over 1.14 million has one of the highest ethnic minority percentages in the UK (51%). - The CWT received a grant of £24,750 to research the development of healthy eating resources that celebrate the city's diversity, support education and catalyse healthy eating amongst the different cultural groups.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against the objectives set	Para 1.41	<ul style="list-style-type: none"> - Annual Awards remained affected by Covid. However, over 60 were expected to return to the Annual Awards 2022 Reception. - Over 25 attendees registered for the first CWT online lecture. - Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its
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		<p>beneficiaries and any wider benefits to society as a whole.</p> <ul style="list-style-type: none"> - Recipes and resource production exceeds 500. - Student interns exceeded the expected target of 8 students. - Public engagement increased through our social media channels, now reaching circa 5,000 followers. - Nominations for this year's awards increased the Trust's position as a leading voice for promoting initiatives which enhance our food and improve public health. - Revenue increased tenfold.
Performance of fundraising activities against objectives set	Para 1.41	<p>The following fundraising activities took place between May 2022 and April 2023</p> <ul style="list-style-type: none"> - Overall funding increased tenfold, comprising... - CWT application to the Birmingham City Council for a grant of £24,750 - Online donations via Just Giving, CAF, Amazon Smile, and Go cardless payments. Resulting is an increase from previous years. - Annual awards received sponsorship from the Nutrition Society of £750. - The Charity removed the nomination fee for Annual Award nominations due to the cost of living crisis, enabling more nominations. - The World's Healthiest Afternoon tea did not take place this year due to Covid -
Investment performance against objectives	Para 1.41	No investment made
Other		

Financial Review

<p>Review of the charity's financial position at the end of the period</p>	<p>Para 1.21</p>	<p>Total income in the year until 30th April 2023 amounted to £26,808, an increase of £24,672 on the previous year. Expenditure increased from £3,850 to £5,531 in the previous year. This is mainly due to WHAT project costs with the increase in student interns, which is offset by HEE tariff payments. The financial statements show net income and expenditure for the year being £21,276, with a reduction in the general reserves for the year of £3,474.</p> <p>The primary source of income (£24,750) was restricted grant funding from Birmingham City Council. Other income streams included HEE Dietetic student mentoring, donations, online lectures and sponsorship.</p> <p>The remaining old stock (printed literature) was written off (£637) through annual depreciation. Trustees continue their strategy to economically review and update these resources electronically so as to reinstate passive revenue streams by the placement onto Amazon using the just-in-time printing for self-publishers. This would eliminate the outlay for a print run and monthly storage costs. The publications will continue to be made available on the CWT website.</p> <p>Other assets include the trademark for the World's Healthiest Afternoon Tea. This is currently valued at the original purchase price.</p> <p>Total annual reserves are £31,577, of which £6,827 are general purposes funds. The yearly running costs were £3,365, excluding project costs and stock). Funds held on account would, therefore, cover a minimum of 2 years of running costs.</p> <p>The Trustees continue to pursue both restricted and unrestricted funds in the next financial year via HEE Dietetic student mentoring, events, development and revision of resources, fundraising events and grant funding.</p>
<p>Statement explaining the policy for holding reserves and stating why they are held.</p>	<p>Para 1.22</p>	<p>Finances are regularly reviewed at and between the Trustee's bimonthly meetings. The reserves are satisfactory, which the trustees consider will provide sufficient funds to maintain CWT as a going concern.</p> <p>The balance held as unrestricted funds as of 30th April 2023 was £6,827. This represents a reserve of at least 2 years running costs. The current reserves are higher than the minimum needed. However, the charity expects increased financial commitments in the next financial year. Firstly, running expenses such as administrative costs to support project management of upcoming grant-funded work. Secondly, our annual awards will be held face-to-face in May 2023, and due to the uncertainties of numbers attending in-person events post-COVID, the event is anticipated to run at a loss. Given the event's historical importance in</p>

		<p>increasing the profile of and gaining support for the charity, and due to significant unrestricted reserves being held, Trustees have agreed for the event to go ahead at an expected loss.</p> <p>The BCC research project funds (£24,750) were paid in advance at the end of the CWT financial year and are expected to be spent in the next financial year.</p>
Amount of reserves held	Para 1.22	Total reserves are £31,577, comprising £6,827 for general purposes and £24,750 of BCC project funds.
Reasons for holding zero reserves	Para 1.22	Not applicable
Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Not applicable

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	The principal funding sources include sponsorship, just-giving donations, publication sales, publication pre-sales, student mentoring, grant applications, photographic licensing, event tickets, and event fundraising.
Investment policy and objectives, including any social investment policy adopted	Para 1.46	Not applicable
A description of the principal risks facing the charity	Para 1.46	<p>The biggest risk to CWT is the continuance or resurgence of COVID-19, which would continue to affect fundraising events and attendance at annual award events severely.</p> <p>CWT has limited human resources, i.e. Trustees have limited time in addition to governance. Regular recruitment of volunteers and trustees is vital for CWT's success.</p> <p>The Trustees actively regularly review the charity's major risks and believe that maintaining the above-stated reserves, combined with the annual review, will provide sufficient financial resources for CWT to continue as a going concern in the event of adverse conditions.</p> <p>Another potential risk facing the charity is drawing upon unrestricted revenue without increasing passive revenue streams in future years. Trustees are seeking to source both restricted and unrestricted revenue.</p> <p>Financial risks also include delays in HEE payments to make good the funds spent for the employment of student interns, such as photographic materials, ingredients, and contract dietetic mentoring.</p>

		Further risks also potentially include contractors' failure to deliver in part of the contractual requirements of grant-funded projects. This is offset by trustee input, having a team contributing parts of the project and tight project management expertise.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	The governing document for the trust is a trust deed.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	The Caroline Walker Trust is an unincorporated entity.
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	The board appoints all trustees. External advertising at trustee vacancy websites is made along with online posts of trustee vacancies. Each applicant must supply their CV and two references and attend an interview. Due diligence regarding trustees' past experience is checked at companies' houses and the charity commission databases. Conflict of interest forms must be returned prior to the appointment. All trustees received Governance training from the NCVO and an induction pack prior to joining the Board discussions.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<p>Each trust will receive an induction pack with copies of the following</p> <ul style="list-style-type: none"> - Governing document - Deeds of variation - Essential Trustee CC3 - It's Your decision CC27 - Trustee Welcome Pack - Current financial position - Year-end accounts - Last two board meeting minutes - Insurance policies - Trust policies - Committee TOR's - Resource pack - Market research <p>Each trustee attends the NVC Governance training sessions.</p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	All trustees attend the main board, subcommittees run any projects and are made up wholly of volunteers. There are no employed staff.
Relationship with any related parties	Para 1.51	<p>The Caroline Walker Trust works well with other professional bodies and charities. These include The Nutrition Society, Association for Nutritionists, British Dietetic Association, SENSE, Sustain, The Obesity Alliance, and Consensus Action on Salt and Sugar Health.</p> <p>It also works with universities supporting student placements through mentoring programmes. Universities during the Year</p>

		have included the University of Winchester, University College Dublin, Galway-Mayo Institute of Technology, London Metropolitan University
Other		

Reference and Administrative details

Charity name	The Caroline Walker Trust
Other name the charity uses	CWT
Registered charity number	328580
Charity's principal address	83 Woodford Road South Woodford London E18 2EA

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Kathy Lewis	Acting Chair/Vice Chair		
2	Salam Aazam	Hon. Secretary	Retired 29 March 2023	
3	Shawn McLaren			
4	Carly Atkinson			
5	Kathryn Styles		Joined 21 April 2022	
6	Rana Conway		Joined 08 May 2022	
7	Alex Mswaka		Joined 31 October 2022	
8	Rebecca Stevens		Joined 06 January 2023	
9				
10	Preetpal Kainth		Retired 22 March 2023	
11	Melissa Roche Saint Hill		Retired July 2022	
12	Maxime Guirauton		Retired 14 September 2022	
13	Edwina Revel		Retired 01 January 2023	
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Corporate trustees' names or the directors at the date the report was approved		
Director name		
Kathy Lewis		
Carly Atkinson		
Kathryn Styles		
Rana Conway		
Rebecca Stevens		

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Publication stock The trade mark for the World's Healthiest Afternoon Tea Photo stock
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	<p>7.1 To prepare and print or otherwise produce and circulate or otherwise publish reports, surveys, books, articles, brochures, pamphlets, films, and programmes for radio, television and all communications media on any matter relative to the object of the charity.</p> <p>7.2 To establish and maintain a collection of documents and a directory of institutions and persons involved in public health, food and nutrition matters, circulars, magazines, books and other publications with reference to public health, nutrition, diet, public health, food production, distribution, retailing, catering, cooking and consumption.</p> <p>7.5 to purchase, take on lease or in exchange, hire, or otherwise acquire any real or personal property or any rights or privileges which the Trustees may think necessary or convenient for the promotion of the object of the Charity and to construct, maintain and alter any buildings or erections necessary for the work of the charity.</p> <p>7.6 Subject to such consent as may be required by law to sell, let, mortgage, or dispose of our turn to account all or any other property or assets of the charity as necessary with a view to the promotion of its objects.</p>
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	The registered trademark is registered with IPO. The publication is currently held at the registered address, with original copies housed on the trust's secure Google Drive, on the trust website and on Amazon. The Photo stock is currently being loaded onto the Trust's secure website and Google Drive.

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
External Examiner	Richard Parker	

Name of chief executive or names of senior staff members (Optional information)

N/A

Exemptions from disclosure

Reason for non-disclosure of key personnel details

None


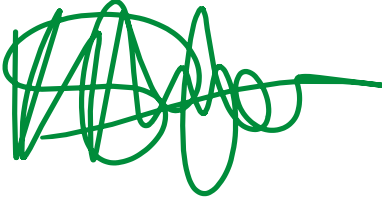
Other optional information

None

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Kathy Lewis	Kathryn Styles
Position (eg Secretary, Chair, etc)	Acting Chair	Treasurer
Date	19/02/2024	26/02/2024

The Caroline Walker Trust

Registered Charity No. 328580

Income and Expenditure

Income

	12 Months to 30th-April- 2023	12 Months to 30th-April- 2022
	Total GBP	Total GBP
Activities and Events	844	750
Birmingham City Project	24,750	
University of Winchester	831	
Donations and Gift Aid	351	461
Publications		25
Interest	14	1
Refunds	18	898
	<u>26,808</u>	<u>2,136</u>

Expenditure

Publication Expenses	(241)	(500)
Websites and Online	(2,183)	(1,188)
Insurance	(534)	(521)
Administration Expenses	(25)	(350)
Activities and Events	(1,512)	(35)
Trustee Meetings and Expenses	(98)	(1,067)
Bank Charges	(18)	(62)
Stock write off	(637)	
Sundry Expenses	(284)	(126)
	<u>(5,531)</u>	<u>(3,850)</u>

Net Income and expenditure

<u>21,276</u>	<u>(1,714)</u>
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Analysed as:

<u>Restricted Funds</u>	24,750	
<u>General Reerves for the year</u>	(3,474)	(1,714)

Check = 0

The Caroline Walker Trust

Registered Charity No. 328580

Balance Sheet

	As at 30th- April-2023	As at 30th- April-2022
	<u>Total GBP</u>	<u>Total GBP</u>
<u>Assets retained for Society's own use</u>		
Trade mark	350	350
<u>Current assets</u>		
<u>Cash Funds</u>		
Cash at Bank	5,445	537
Cash on Deposit	25,782	8,743
	<u>31,227</u>	<u>9,280</u>
<u>Other Current Assets</u>		
Gift Aid		34
Stock at Cost		637
	<u>31,227</u>	<u>9,951</u>
<u>Total Current assets</u>		
	<u>31,227</u>	<u>9,951</u>
<u>Total Assets</u>	<u>31,577</u>	<u>10,301</u>
<u>Liabilities</u>		
General reserves brought forward	10,301	12,015
Current Year General Reserves	(3,474)	(1,714)
General Reserves carried forward	<u>6,827</u>	<u>10,301</u>
Restricted funds	24,750	
<u>Total Reserves</u>	<u>31,577</u>	<u>10,301</u>

Prepared by



Kathy Lewis
Chair of Trustees

Examined by



Richard Parker



Section A

Independent Examiner's Report

Report to the trustees	The Caroline Walker Trust		
On accounts for the year ended	30 th April 2023	Charity no (if any)	328580
Set out on pages	1 & 2		

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 27/07/2023

Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:

Date:

19 February 23

Name:

Richard H Parker

Relevant professional qualification(s) or body (if any):

FCA

Address:

Cromwell cottage

6, Cromwell Gardens

Marlow, SL7 1BG

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

No issues to report