



Dartmouth Caring Supporting Our Community

ANNUAL REPORT

April 2019- March 2020



What we did in 2019-20 and what it looks like in practice?

All these services can be accessed by anyone living in the area at no cost - except where stated otherwise.

8 days before our year end we were faced with the imposition of Lockdown, due to the Coronavirus. We reacted early and had already adjusted our services with effect from the 16th March. This report, therefore deals almost exclusively with pre-Covid-19 times.



Trained staff help local people get the benefits they need – every year these staff assist members of the community make claims for benefits linked to disability, pension credit, Universal credit, etc.

Memory Cafés every Tuesday at the Baptist Church in Ivatt Road – supporting those with memory issues and their carers. In 2018 we introduced our nurse led Dementia Liaison service. Due to Lockdown this service was suspended until it is safe to resume. In its place colleagues make regular contact and visits to clients, provide meals on wheels. Some of these clients are amongst the most vulnerable we support.



Our volunteer drivers take local people to health appointments at outpatients in hospital, the GP practice and others. They wait then bring them home. This service was stopped during Lockdown. **We ask for a donation to cover the driver's running costs only.**

Nurse, Andie Day has now been running our Palliative & Cancer Care Liaison service for 2 years - in that time she has helped 91 people through this difficult time in their lives. Her support and advice is for those with the diagnosis and for their family.



Our lunch clubs provide a regular time during the week for over 55s to meet, socialise and enjoy a wholesome home-made meal, with pudding, tea, coffee and biscuits. **We charge £5 per meal.** This service was replaced by Meals on Wheels at the end of the year when Lockdown came in.

We have 4 volunteer counsellors who between them support 12 clients at a time with their issues. Each client can access a bespoke 10 week programme to help them through their issues. This became a telephone only service but has continued since March 2020.

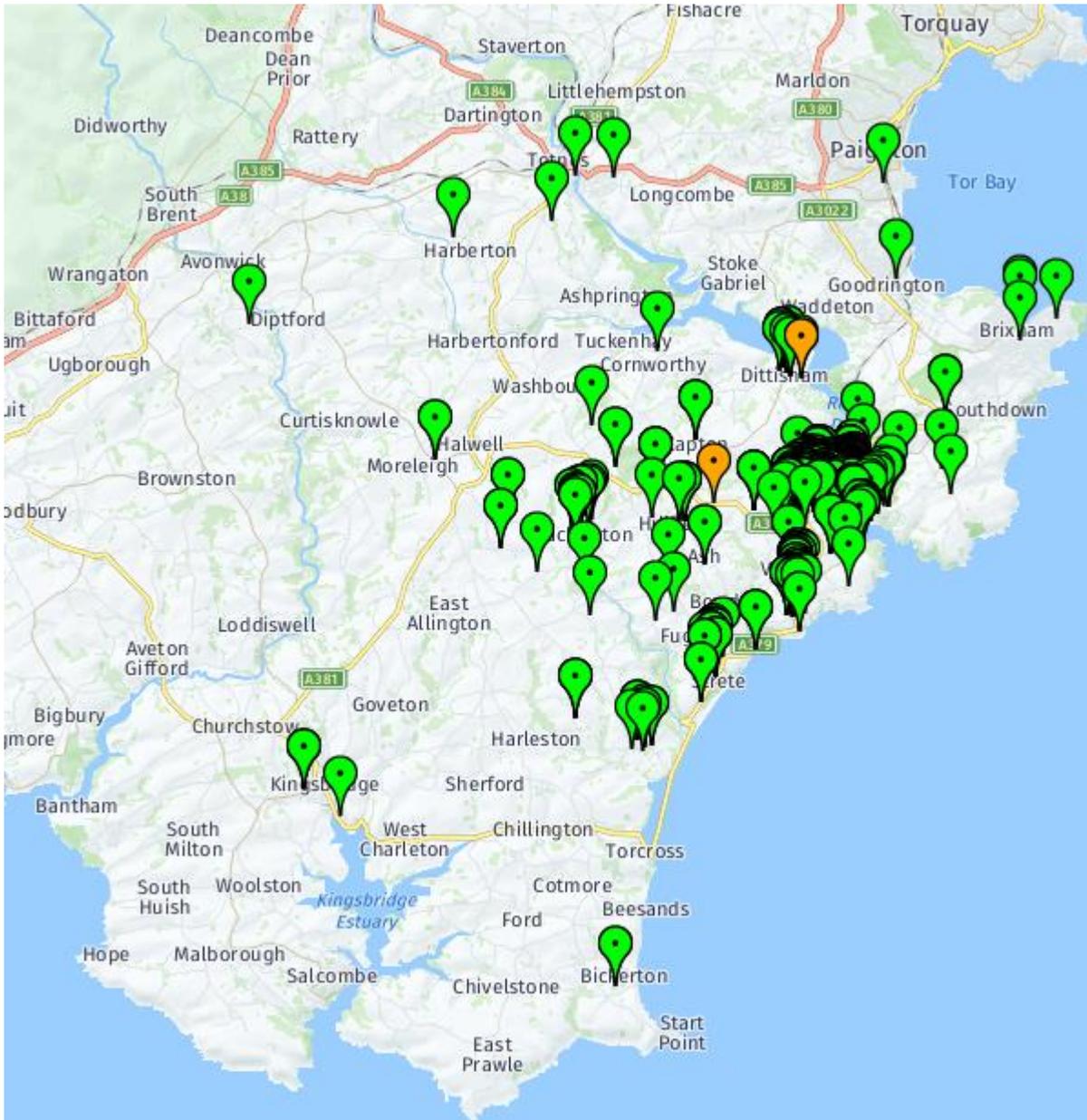


We liaise closely with the NHS to support over 60s with their discharge from hospital. This involve shopping, collecting prescriptions, speaking to clients about their needs and ensuring they have the support they need.

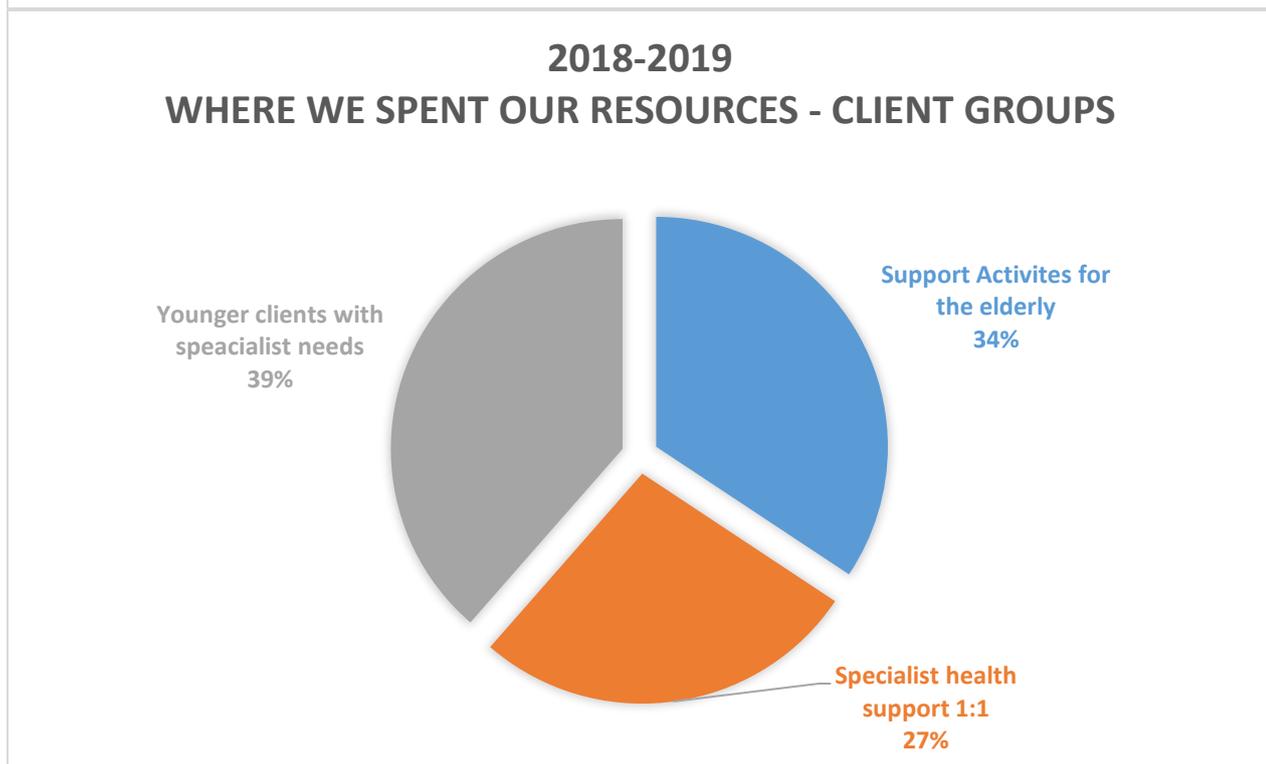
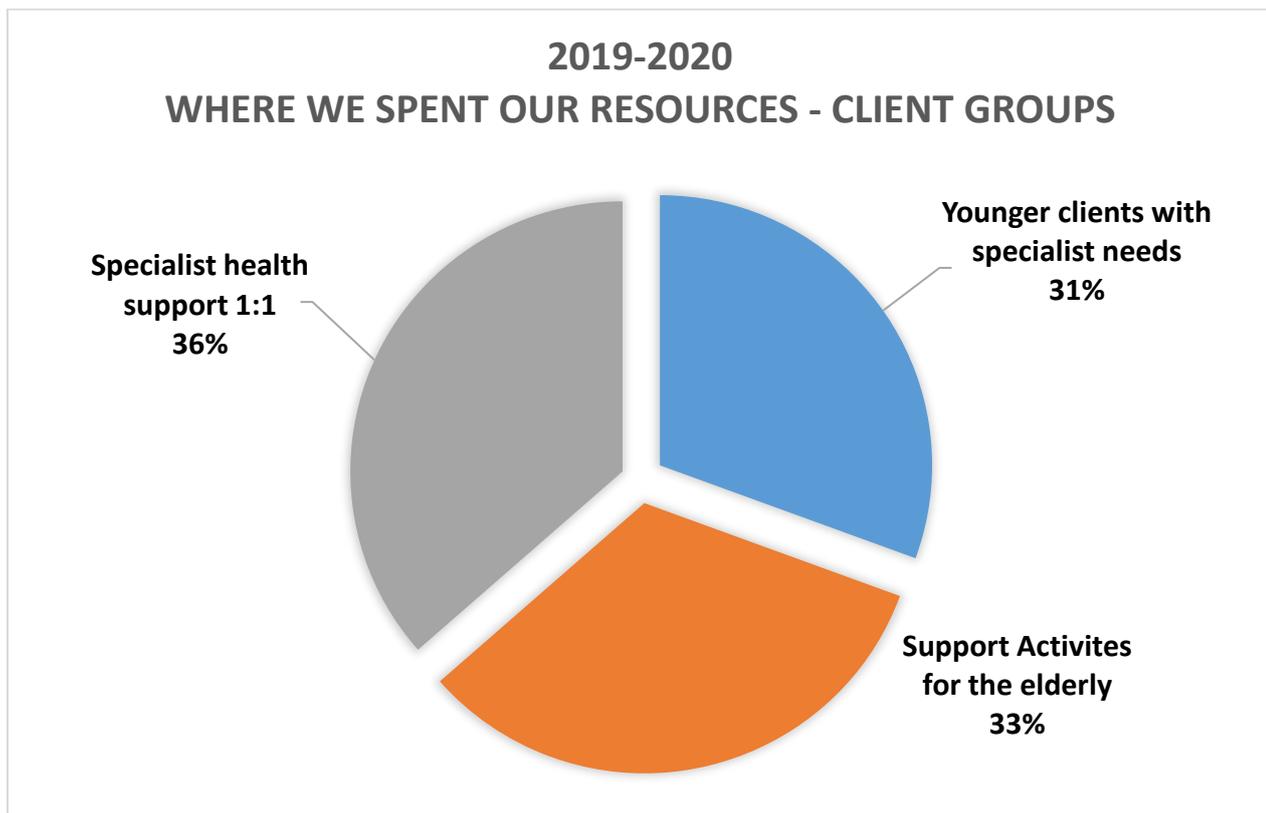
We also work with young people at the Academy adding to the support the school is able to offer their students. This programme is now in its 9th year.



WHERE OUR CLIENTS LIVE



WHERE WE SPEND OUR RESOURCES



Major benefactors:

<ul style="list-style-type: none"> • Dartmouth United Charities • Claire Milne Trust • Hadley Trust 	<ul style="list-style-type: none"> • The National Lottery • James Tudor Foundation
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Chair's remarks – 2019-20

I cannot believe the last year we have had. In January Trustees and staff were looking forward to another year supporting our community and developing our services for this all to change.

At the end of March 2020 we were in total lockdown as a country due to the COVID-19 virus. As a charity we had a preparation meeting on the 16th March where Nick, Sarah, Andie, and I had a morning discussing the strategy for the charity in the soon to be announced lockdown.

We changed the normal working practices of the charity cancelling the social clubs and events Memory Café, Visually Impaired Reading Group, and both lunch clubs. With the Academy closing the Young Dartmouth was also put on hold.

Staff working practices had to change to allow social distancing and home working. All this was boosted by the wonderful support of our community which saw an influx of new volunteers to bolster those already engaged. I am so grateful to all who have helped us and in doing so helped their community.

Two days after the planning meeting and the cancellation of group activities we had identified the 200 most vulnerable clients, allocated staff to be the weekly contact for each of them, and set up a meals on wheels service from scratch. I have to say that early discussion and the measures taken prepared us for those lockdown months.

Looking at the year before lockdown we continued to develop and grow and the staff continued to work hard to support clients with medical, financial, and mental health issues. As Chair of the charity I was grateful to the staff and volunteers as we continued to work in partnership with other organisations in Dartmouth.

Going forward to 2020-2021 we continue to be very cautious about the future and I believe will continue until the vaccine is available to our community I am so grateful to the staff and volunteers of Dartmouth Caring and all the lovely people and organisations who have supported the charity over the years. We now have a very strong and supportive board of Trustees and I personally thank them for their help and advice as to the future of Dartmouth Caring.

We will continue to develop and grow and with the support of all I believe the charity will be stronger.

I thank you all because without your support Dartmouth Caring would not be the vibrant charity it is today.

Dee Nutt, MBE - Chair of Trustees

All charities have aims, ours are:

“to support those in need in Dartmouth and the surrounding villages”.

Detailed breakdown of key activities:

	2017-18	2018-19	2019-20
Support activities	Client interactions		
Memory Cafés	484	606	1275
Lunch Clubs	2197	2218	2350
Other	313	309	194
Befriending	380	547	492
Shopping	47	580	421
Transport	1876	1598	1187
Total	5297	5858	5919

	2017-18	2018-19	2019-20
Specialist support activity with individuals	Client interactions		
Palliative and Cancer Care Liaison Service	132	1151	2741
Dementia liaison service	0	228	1185
Dartmouth Caring Counsellors	110	190	220
DC home help service	0	10	512
Total	242	1579	4658

	2017-18	2018-19	2019-20
Support activity with individuals	Client interactions		
Client info from Virtual Ward	34	19	57
Telephone Befriending	8	40	235
One off email	68	564	4274
Phone Call	945	1770	
One off Post	13	26	
Visited client	395	766	1541
Client visited the Office	163	225	
Personal Contact	27	29	
Home from Hospital contact	364	407	393
Other	218	203	68
MDT meeting	6	27	81
Total contacts	4093	4463	6649

Total interactions with clients	9643	12929	17226
Percentage increase		34.00%	33.24%

KEY

CLIENTS

ACTIONS

Help for
individuals

450

- SPECIALIST SUPPORT - three quarters of referrals need this
- MINOR SUPPORT AND ADVICE – other quarter of referrals

GROUP
ACTIVITIES

125

- 3600 GROUP ATTENDANCES

TRANSPORT

225

- 300 CLIENTS
- 1200 ROUND TRIP JOURNEYS,
 - 24/WEEK

OVERALL

ACTIVITIES

RESOURCES

WHAT IS IT?

- Staff time equal to four full timers
- 4 trained volunteers

- Nurse led dementia support and palliative and oncology care and support
- Liaison and advocacy for clients with care and health services
- Carers
- Support with hospital discharge

- Supporting people with officialdom:
 - Benefits
 - Housing
 - Disability
 - Utilities
 - Home Help service



- 30 Volunteers
- Staff time equivalent to one full time

- Lunch Club
- Memory Café
- ViP reading group



- 35 Volunteers
- Staff Co-ordinator

- 1200 hospital visits
- 300 local health visits



**13,000 INTERACTIONS WITH
OVER 750 DIFFERENT CLIENTS**

Treasurer's Report and reserve policy - 2019-20

Thanks to the continued generous support of our benefactors Dartmouth Caring remains in a strong financial position. Services were once more expanded, with total expenditure rising 6% to £258,000.

During this year our income totalled £255,000, fractionally less than our spend, with the balance being met from reserves.

Our sources of income are varied, but the majority is naturally irregular in nature. We thus have to maintain reserves to enable activities to continue through what can be months of modest income. In the event that income reduces and continues at a lower level the reserves give a period of grace in which to adjust our activities without unduly disturbing services to clients.

Our policy is to aim to hold undesignated reserves of between 60% and 80% of annual expenditure. The level of reserves is only indirectly in the Trustees control – we are able to increase services as the reserves rise, but equally have to reduce services if the reserves become uncomfortably low.

At the year end the undesignated reserves stood at 63% of annual expenditure. The reserves comprise some £14,000 restricted to specified activities, and some £146,000 general reserves.

These reserves will help us sustain services through the uncertainties of the pandemic,

The trustees are very grateful for the continued support of our donors, large and small.

A handwritten signature in black ink, appearing to read 'D Flowerday', with a long, sweeping flourish extending to the right.

David Flowerday - Treasurer

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards.

The trustees are required to prepare financial statements which give a true and fair view of charity and of the incoming resources and application of resources of the charity. In preparing these financial statements the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy the financial position of the charity and enable them to ensure that the financial statements comply with legislation. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

On behalf of the board:

A handwritten signature in black ink that reads "D Flowerday". The signature is written in a cursive style with a long, sweeping tail.

David Flowerday Treasurer & Trustee

November 2020

Dartmouth Caring

Independent Examiner's Report to the Trustees of Dartmouth Caring

Year ended 31 March 2020

I report to the trustees on my examination of the financial statements of Dartmouth Caring ('the charity') for the year ended 31 March 2020.

Responsibilities and basis of report

As the trustees of the charity you are responsible for the preparation of the financial statements in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's financial statements 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

Since the charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales (ICAEW), which is one of the listed bodies.

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

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the financial statements do not accord with those records; or
3. the financial statements do 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.

Subject to the matter referred to in the paragraph below 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.

In accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102), the Charities SORP (FRS 102) and the Charities Act 2011 the charity's accounting policies should be presented at the beginning of the notes to the financial statements in order to reflect the importance attached to these policies. The trustees have chosen to present their accounting policies at the end of the notes to the financial statements in order to make the financial statements more user friendly.

.....
S R Smith (FCA)

Thomas Westcott

Chartered Accountants

Independent Examiner

Petitor House

Nicholson Road

Torquay, Devon, TQ2 7TD

Dartmouth Caring
Statement of Financial Activities
Year ended 31 March 2020

		2020			2019
		Unrestricted funds	Restricted funds	Total funds	Total funds
Note	£	£	£	£	£
Income and endowments					
Donations and legacies	3	123,030	80,731	203,761	211,658
Charitable activities	4	43,442	–	43,442	25,112
Fundraising income		6,479	–	6,479	8,362
Investment income	5	1,584	–	1,584	1,905
		—————	—————	—————	—————
Total income		174,535	80,731	255,266	247,037
		=====	=====	=====	=====
Expenditure					
Expenditure on fundraising		3,181	–	3,181	7,796
Expenditure on charitable activities	6	188,279	66,546	254,825	236,406
		—————	—————	—————	—————
Total expenditure		191,460	66,546	258,006	244,202
		=====	=====	=====	=====
		—————	—————	—————	—————
Net (expenditure)/income and net movement in funds		(16,925)	14,185	(2,740)	2,835
		=====	=====	=====	=====
Reconciliation of funds					
Total funds brought forward		163,235	–	163,235	160,400
		—————	—————	—————	—————
Total funds carried forward		146,310	14,185	160,495	163,235
		=====	=====	=====	=====

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

Dartmouth Caring
Statement of Financial Position
Year ended 31 March 2020

		2020	2019
	Note	£	£
Fixed assets			
Tangible fixed assets	10	1,650	5,100
Current assets			
Debtors	11	6,298	6,379
Investments	12	79,069	85,995
Cash at bank and in hand		93,509	96,958
		-----	-----
		178,876	189,332
Creditors: amounts falling due within one year	13	20,031	31,197
		-----	-----
Net current assets		158,845	158,135
		-----	-----
Total assets less current liabilities		160,495	163,235
		-----	-----
Net assets		160,495	163,235
		=====	=====
Funds of the charity			
Restricted funds		14,185	-
Unrestricted funds		146,310	163,235
		-----	-----
Total charity funds	16	160,495	163,235
		=====	=====

These financial statements were approved by the board of trustees and authorised for issue on December 3rd 2020, and are signed on behalf of the board by:

Dee Nutt

David Flowerday

Trustee

Trustee

LEGAL AND ADMINISTRATIVE

CHARITY NUMBER: 900226

BUSINESS ADDRESS: 35 VICTORIA ROAD
DARTMOUTH
DEVON TQ6 9RT

President	Iris Pritchard (Non-trustee)
Chair Trustee	Dee Nutt
Treasurer Trustee	David Flowerday
Vice Chair Trustee	Charles Sutherland
Trustee	Peter Adolphus
Trustee	Martin McGowan-Scanlon
Appointed October 2019	
Trustee	Caroline Martin
Trustee	Dr. Frances Davidson

INDEPENDENT EXAMINER: SEAN SMITH (FCA)
THOMAS WESTCOTT CHARTERED ACCOUNTANTS
PETITOR HOUSE
NICHOLSON HOUSE
TORQUAY
DEVON

KEY PERSONNEL NICK HINDMARSH
MANAGER

BANKERS: LLOYDS BANK
31 FORE STREET
TOTNES
DEVON
TQ9 5HH

STRUCTURE, GOVERNANCE & MANAGEMENT

- Dartmouth Caring is an unincorporated standard registered charity.
- It is governed by its Constitution adopted on 17 July 1989 and amended 17 October 2013, as registered with the Charity Commission in October 2013.

The election of officers and other trustees is to take place in General Meetings:

- Each trustee shall retire with effect at the following Annual General Meeting after his appointment but shall be eligible for re-election at that Annual General Meeting.
- No one may be elected a trustee or an officer at any Annual General Meeting unless before the meeting the charity is given notice that is signed by a member entitled to vote at the meeting, states the member's intention to propose the appointment of a person as a trustee or as an officer and is signed by the person who is to be proposed to show his willingness to be appointed.
- The maximum number of trustees is fixed at 12 and the trustees may not appoint a person to be an officer if the person has already been elected or appointed to that office and has not yet vacated the office.

OBJECTIVES & ACTIVITIES FOR THE PUBLIC BENEFIT

- The Charity's objectives are to undertake voluntary work in education, health & welfare, social services and similar support activities amongst those in need.
- Dartmouth Caring will serve the geographical area around Dartmouth, Stoke Fleming, Strete, Blackawton, Dittisham; served by Torbay Hospital, Derriford Hospital, Royal Devon & Exeter Hospital and the Dartmouth Medical Practice and any successors thereto.
- We have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing our aims and objectives and in planning our future activities.

RECRUITMENT AND INDUCTION OF NEW TRUSTEES

- The Trust Board is always mindful of the need to review its skills set and the capacity of the Board to discharge its role.
- When a need to recruit new trustees arises an external advertisement is placed in the local press and on social media. If a wider search is needed then other channels will be explored.
- Potential trustees need to apply for the role. Those short listed are interviewed by the Chair and one other trustee, with the Manager.
- On appointment the Manager spends time with new trustees ensuring they are aware of their roles and responsibilities and current issues facing the charity; this includes discussing Safeguarding and completion of DBS checks. An induction pack is used to assist this process.