

# **Leeds Bereavement Forum**

Charity number 1093311

## **Annual Report and Financial Statements**

**for the year ended 31 March 2022**



# **Leeds Bereavement Forum**

## **Annual Report and Financial Statements**

**for the year ended 31 March 2022**

| <b>Contents</b>                     | <b>Page</b> |
|-------------------------------------|-------------|
| Trustees' report                    | 2 to 4      |
| Examiner's report                   | 5           |
| Receipts and payments account       | 6           |
| Statement of assets and liabilities | 7           |
| Notes to the accounts               | 8 to 9      |

**Prepared by West Yorkshire Community Accountancy Service CIO**

# **Leeds Bereavement Forum**

## **Trustees' report for the year ended 31 March 2022**

### **Reference and administrative details of the charity, its trustees and advisors**

The trustees during the financial year and up to and including the date the report was approved were:

| <b>Name</b>            | <b>Position</b> | <b>Dates</b>              |
|------------------------|-----------------|---------------------------|
| Xina Gooding Broderick | Chair           |                           |
| Satwant Kaur Rait      | Secretary       |                           |
| Joanne Dyson           | Treasurer       |                           |
| Simon Moran            |                 |                           |
| Emma Pickering         |                 |                           |
| Nadine Owens           |                 |                           |
| Hillary Wadsworth      |                 | Appointed 1 December 2021 |

|                       |         |                                 |
|-----------------------|---------|---------------------------------|
| <b>Charity number</b> | 1093311 | Registered in England and Wales |
|-----------------------|---------|---------------------------------|

### **Registered and principal address**

18A New Market Street  
Leeds  
LS1 6DG

### **Bankers**

|              |                            |                   |
|--------------|----------------------------|-------------------|
| HSBC plc     | CCLA Investment Management | Co-operative Bank |
| 4 Otley Road | COIF Charity Funds         | PO Box 250        |
| Headingley   | 80 Cheapside               | Skelmersdale      |
| Leeds        | London                     | WN8 6WT           |
| LS6 2DF      | EC2V 6DZ                   |                   |

### **Independent examiner**

Stephen Procter

### **West Yorkshire Community Accountancy Service CIO**

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW

### **Structure, governance and management**

The charity is governed by a constitution adopted on 16 July 2002, as amended on 18 November 2020.

### **Method of recruitment and appointment of trustees**

The trustees of the charity are appointed by the members at the AGM.

# **Leeds Bereavement Forum**

## **Trustees' report (continued) for the year ended 31 March 2022**

### **Objectives and activities**

#### **The charity's objects**

For the public benefit to advance education in all matters related to bereavement, in particular but not exclusively by the provision of information, advice and training with the object of relieving the suffering of those affected by death.

#### **The charity's main activities**

LBF is a small charity based in Leeds which works to develop and improve bereavement services in the city.

We signpost individuals to the most appropriate bereavement service either locally or nationally. You do not need to be referred to us, our service is free and open to all

We provide training, information, events and conferences to people who work in the area of bereavement to support their professional development. We work in partnership with organisations across the city to improve the provision of bereavement services.

We campaign to help people talk more openly about dying, death and bereavement and to make plans for the end of life. We work in partnership with Dying Matters nationally and locally.

#### **Public benefit statement**

In setting our objectives and planning our activities our trustees have given serious consideration to the Charity Commission's general guidance on public benefit.

#### **Achievements and performance**

2021 has been the year we have steadily returned to a more recognisable way of working. Thanks to additional funding from NHS Leeds Clinical Commissioning Group this year, we have been able to maintain our increased staff hours of the previous year and buy much needed hardware. Gradually we have reintroduced face-to-face meetings and training into our work as well as continuing to work virtually when appropriate. We returned to part-time office-based working in May 2021 following over 13 months of exclusively home-working.

#### **Signposting**

We continue to signpost individuals and organisations to the most appropriate bereavement service either locally or nationally. This year we received 293 advice and information queries, an increase of 18 per cent on the previous financial year and up 42 per cent on our pre-pandemic levels. The queries we now receive are distinctly more complicated and time consuming than pre-pandemic, each referral can often involve a number of phone calls and emails. We have found that people are experiencing multiple bereavements; complicated grieving patterns with many people being bereaved (often multiple times) under lockdown and have additional mental health struggles which are often long standing.

Our e-bulletin continues to go out monthly alongside information on Twitter and Facebook and visits to our website continue to do well, with Q2 and Q3 this year being the highest quarterly figures ever.

#### **Training**

Our training has gone from strength to strength, we have run 21 training courses over the year, our highest figure ever, re-introducing our first in-person training in March 2022. Training 194 people this year from the third sector as well as the statutory and commercial sector, we continue to provide our well respected 'Basic Bereavement Skills' course, 'Dying Matters Leeds' course and 'Supporting People with Learning Disabilities through a Bereavement' course. During the year, we have developed our new Bereavement and Loss Training course. Thanks to two-year funding in 2020 from Harnessing the Power of Communities, we have developed new training to support older people's organisations across Leeds to create their own peer bereavement support groups, which has been very successful. This training has led to the creation of several new peer bereavement groups across Leeds as well as a newly formed Peer Bereavement Groups in Leeds Co-ordinators regular meeting which we facilitate.

# **Leeds Bereavement Forum**

## **Trustees' report (continued) for the year ended 31 March 2022**

### **Achievements and performance (cont.)**

#### **Encouraging conversations about death and dying**

Death Cafés are an international movement dedicated to encouraging discussion about death and dying in a relaxed environment. As with our training, our Death Cafés moved online during the pandemic but we held our first in real life Death Café again in October 2021, as part of the Kinder Leeds Festival at Jamyang Buddhist Centre. We held ten Death Cafés in total this year, reaching 66 people. Going forward we will continue to host a mixture of virtual and in real life Death Cafés.

Sadly, our face-to-face events have not happened again this financial year, including our annual conference. We hope to be able to run some of those events later in 2022. However, we will continue to run some of our events online, as we have seen how this hybrid model can really work successfully for many people.

#### **Annual General Meeting**

Our AGM in December was kindly sponsored, for the third year, by Co-op Funeralcare and for the second time was held online. Following the official AGM business, we were joined by Mark A. Stancombe from Vicarious Traumatisation (VT) to understand more about Vicarious Traumatisation and what is needed to build resilience and well-being. The workshop was relevant to anyone who supports other people who are suffering, regardless of whether the suffering is physical, emotional or both. The focus of this session was to understand VT and how to notice and mitigate its impact through research-based self-care and resilience-building.

#### **Partnerships**

We remain a key partner in the Dying Matters Leeds Partnership, facilitated by Leeds City Council. We continue to administrate the Dying Matters Leeds Grant Funding and this year managed two grant schemes – the first delayed Dying Matters Week funding from 2020 to take place during Dying Matters Week 2022. The second is the autumn 2021 round of funding which took place between November 2021 and March 2022.

Our Citywide Bereavement Services Forum has gone from strength to strength in the last year. This networking group, chaired by LBF was established in 2015 and is made up of sixteen third sector and statutory bereavement organisations across Leeds who provide support to adults, children and young people. This year we met three times to share good practice; work in partnership and identify any gaps in bereavement provision across the city.

Supporting bereaved people has become even more important during this year and building on our partnership working with other third sector Leeds-based bereavement organisation; NHS Leeds Clinical Commissioning Group; Leeds City Council; Leeds Teaching Hospital Trust and all our partners across Leeds has become even more key than ever.

Jane Robinson, Manager

These are the last set of accounts for the LBF charity as a new CIO has been formed and the assets were transferred across on 1 April 2022.

#### **Financial review**

Net payments for the year were £8,166, including net payments of £6,942 on unrestricted funds and net payments of £1,224 on restricted funds.

#### **Reserves policy**

The charity's free reserves at the year end were £28,233.

The charity will attempt to maintain reserves equivalent to between 3 and 6 months running costs.

Approved by the board of trustees on .....

Signed: ..... (Trustee)

Name: .....

# **Leeds Bereavement Forum**

## **Independent examiner's report to the trustees of Leeds Bereavement Forum**

I report to the charity trustees on my examination of the accounts of the charity for the year ended 31 March 2022, which are set out on pages 6 to 9.

### **Responsibilities and basis of report**

As the charity 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 charity's accounts as carried out under section 145 of the 2011 Act. 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 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 accounts do not accord with those records.

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: ..... Name: Stephen Procter

Date: .....

### **West Yorkshire Community Accountancy Service CIO**

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW

**Leeds Bereavement Forum**  
**Receipts and payments account**  
**for the year ended 31 March 2022**

|   | Notes | 2022<br>Unrestricted<br>funds<br>£ | 2022<br>Restricted<br>funds<br>£ | 2022<br>Total<br>funds<br>£ | 2021<br>Total<br>funds<br>£ |
|---|-------|------------------------------------|----------------------------------|-----------------------------|-----------------------------|
| <b>Receipts</b>                             |       |                                    |                                  |                             |                             |
| Grants and donations                        | (2)   | 42,545                             | 10,290                           | 52,835                      | 68,225                      |
| Membership, training and conference fees    |       | 4,450                              | -                                | 4,450                       | 4,255                       |
| Bank interest                               |       | 9                                  | -                                | 9                           | 25                          |
| Sponsorship                                 |       | -                                  | -                                | -                           | 350                         |
| <b>Total receipts</b>                       |       | <b>47,004</b>                      | <b>10,290</b>                    | <b>57,294</b>               | <b>72,855</b>               |
| <b>Payments</b>                             |       |                                    |                                  |                             |                             |
| Staff costs                                 |       | 44,425                             | 3,907                            | 48,332                      | 46,350                      |
| Travel expenses                             |       | 45                                 | -                                | 45                          | 12                          |
| Trainers fees and expenses                  |       | 1,477                              | 1,038                            | 2,515                       | 3,905                       |
| Training and development                    |       | 403                                | -                                | 403                         | 174                         |
| Rent, rates, room hire and service charge   |       | 4,050                              | -                                | 4,050                       | 4,000                       |
| Photocopying and printing                   |       | 756                                | 146                              | 902                         | 884                         |
| Postage and stationery                      |       | 16                                 | -                                | 16                          | 31                          |
| Telephone and internet                      |       | 640                                | -                                | 640                         | 666                         |
| Memberships and subscriptions               |       | 85                                 | -                                | 85                          | 85                          |
| Insurance                                   |       | 567                                | -                                | 567                         | 1,254                       |
| Independent examination                     |       | 420                                | -                                | 420                         | 420                         |
| Dying Matters grants                        |       | -                                  | 6,247                            | 6,247                       | 338                         |
| HoPC project costs                          |       | -                                  | 176                              | 176                         | -                           |
| IT equipment, support, supplies and website |       | 749                                | -                                | 749                         | 2,617                       |
| Refreshments                                |       | 155                                | -                                | 155                         | -                           |
| AGM costs                                   |       | 150                                | -                                | 150                         | 250                         |
| Bank charges                                |       | 8                                  | -                                | 8                           | -                           |
| <b>Total payments</b>                       |       | <b>53,946</b>                      | <b>11,514</b>                    | <b>65,460</b>               | <b>60,986</b>               |
| <b>Net income / (expenditure)</b>           |       | <b>(6,942)</b>                     | <b>(1,224)</b>                   | <b>(8,166)</b>              | <b>11,869</b>               |
| <b>Fund balances brought forward</b>        |       | <b>35,175</b>                      | <b>4,827</b>                     | <b>40,002</b>               | <b>28,133</b>               |
| <b>Fund balances carried forward</b>        | (3)   | <b>28,233</b>                      | <b>3,603</b>                     | <b>31,836</b>               | <b>40,002</b>               |

**Leeds Bereavement Forum**  
**Statement of assets and liabilities**  
**as at 31 March 2022**

|                         | 2022          | 2022         | 2022          | 2021          |
|-------------------------|---------------|--------------|---------------|---------------|
|                         | Unrestricted  | Restricted   | Total         | Total         |
|                         | £             | £            | £             | £             |
| <b>Cash funds</b>       |               |              |               |               |
| Cash at bank            | 28,208        | 3,603        | 31,811        | 39,958        |
| Cash in hand            | 25            | -            | 25            | 44            |
| <b>Total cash funds</b> | <b>28,233</b> | <b>3,603</b> | <b>31,836</b> | <b>40,002</b> |

| <b>Amounts owed to the charity</b> | £          |
|------------------------------------|------------|
| Training fees                      | 650        |
| AGM sponsorship                    | 250        |
|                                    | <b>900</b> |

**Assets retained for the charity's own use**

1 x Computer (desktop)  
3 x Laptop  
Projector  
2 x screens  
2 x Lenovo Laptops (2021)

| <b>Liabilities</b>      | £            |
|-------------------------|--------------|
| Trainers fees           | 543          |
| Independent examination | 420          |
| Staff expenses          | 65           |
|                         | <b>1,028</b> |

The financial statements were approved by the board of trustees on .....

Signed: ..... (Trustee)

Name: .....

**Leeds Bereavement Forum**  
**Notes to the accounts**  
**for the year ended 31 March 2022**

**1 Accounting policies**

**Basis of accounting**

The trustees have taken advantage of section 133 of the Charities Act 2011 and have prepared the accounts on a receipts and payments basis.

There has been no change to the accounting policies since last year.

No changes have been made to the accounts for previous years.

**Taxation**

As a charity the organisation benefits from rates relief and is generally exempt from income tax and capital gains tax but not from VAT. Irrecoverable VAT is included in the cost of those items to which it relates.

**Fund accounting**

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of an appeal.

Further explanation of the nature and purpose of each fund is included in the notes to the accounts.

**Leeds Bereavement Forum**  
**Notes to the accounts continued**  
**for the year ended 31 March 2022**

| <b>2 Grants and donations</b>       | <b>2022</b>                | <b>2022</b>              | <b>2022</b>         | <b>2021</b>         |
|-------------------------------------|----------------------------|--------------------------|---------------------|---------------------|
|                                     | Unrestricted<br>funds<br>£ | Restricted<br>funds<br>£ | Total<br>funds<br>£ | Total<br>funds<br>£ |
| NHS Leeds CCG's                     | 41,770                     | -                        | 41,770              | 53,775              |
| Leeds City Council - Dying Matters  | -                          | 5,600                    | 5,600               | -                   |
| Leeds Harnessing Power of Community | -                          | 4,690                    | 4,690               | 4,690               |
| Leeds City Council                  | 400                        | -                        | 400                 | -                   |
| Leeds Community Foundation          | -                          | -                        | -                   | 9,260               |
| Sir George Martin                   | -                          | -                        | -                   | 500                 |
| Other donations                     | 375                        | -                        | 375                 | -                   |
|                                     | <b>42,545</b>              | <b>10,290</b>            | <b>52,835</b>       | <b>68,225</b>       |

| <b>3 Restricted funds</b>              | <b>Balance b/f</b> | <b>Receipts</b> | <b>Payments</b> | <b>Transfers</b> | <b>Balance c/f</b> |
|--|--------------------|-----------------|-----------------|------------------|--------------------|
|  | £                  | £               | £               | £                | £                  |
| LCC - Dying Matters                    | 1,662              | 5,600           | 6,393           | -                | 869                |
| Leeds Harnessing Power of<br>Community | 3,165              | 4,690           | 5,121           | -                | 2,734              |
|  | <b>4,827</b>       | <b>10,290</b>   | <b>11,514</b>   | <b>-</b>         | <b>3,603</b>       |

| <b>Fund name</b>                       | <b>Purpose of restriction</b>  |
|--|--|
| LCC Dying Matters                      | For the 'Dying Matters' small grants programme.                      |
| Leeds Harnessing Power of<br>Community | To help staff and volunteers of Neighbourhood Network Scheme groups. |

**4 Related party transactions**

**Trustee expenses**

No trustee received any expenses during this year or the previous year.

**Trustee remuneration and benefits**

No trustee received any remuneration or benefit during this or the previous year.