

Leeds Bereavement Forum

Charity number 1194277

Annual Report and Financial Statements for the year ended 31 March 2023



**LEEDS
BEREAVEMENT
FORUM**

WYCAS

COMMUNITY ACCOUNTING
WEST YORKSHIRE

Leeds Bereavement Forum

Annual Report and Financial Statements for the year ended 31 March 2023

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Prepared by West Yorkshire Community Accountancy Service CIO

Leeds Bereavement Forum

Trustees' report for the year ended 31 March 2023

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:

Name	Position	Dates
Xina Gooding Broderick		
Satwant Kaur Rait		Resigned 7 December 2022
Joanne Dyson		
Simon Moran		
Emma Pickering		
Nadine Owens		
Hillary Wadsworth		

Charity number 1194277 Registered in England and Wales

Registered and principal address	Bankers
18a New Market Street	Co-operative bank plc
Leeds	PO Box 101
LS1 6DG	1 Balloon Street
	Manchester
	M60 4EP

Independent examiner

Katy Sargeant ACA

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

The charity is a Charitable Incorporated Organisation (CIO) association formed on 29 April 2021 and is governed by a constitution.

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 2023

Objectives and activities

The charity's objects

The objects of the association are 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.

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

From 1 April 2022 Leeds Bereavement Forum has been working under our new charitable incorporated organisation (CIO) charity number, in place of our previous unincorporated charity status. With staff continuing to work both from the office and from home, the majority of our meetings and training now take place in real life but we do continue to run work online where it is more practicable. Unfortunately, no additional funding was available this year from the NHS Leeds Clinical Commissioning Group (known as NHS West Yorkshire Integrated Care Board from 1 July 2022) so we are now working at 1.2 FTE staff levels, a reduction on the previous two years when we had capacity of 1.4 FTE staff.

Signposting

We continue to signpost individuals and organisations to the most appropriate bereavement service either locally or nationally. This year, we received 255 advice and information queries, a drop of 13 per cent on the previous financial year but still up 23 per cent on our pre-pandemic levels. We produced new leaflets and signposting cards in the autumn, thanks to funding from 'Five Ways to Wellbeing' fund, which were distributed widely across Leeds. Probably, due to this, we experienced our highest quarterly enquiry figure ever during Q4 of this year – 92 enquiries.

As we found last year, the queries we now receive are distinctly more complicated and time consuming than pre-pandemic; each referral can often involve several 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, this being the busiest year ever for our website.

Training

Training has been much quieter this year than previously, we believe that voluntary organisations probably have less money available in their budgets to pay for additional staff and volunteer training. Our two-year funding from Harnessing the Power of Communities, where we developed new training to support older people's organisations across Leeds to create their own peer bereavement support groups ended in September 2022. However, we continue to run our newly created Leeds Peer Bereavement Support Group Co-ordinators' Network meetings across the year to support staff and volunteers who run regular bereavement groups. Our Basic Bereavement Skills training for Leeds City Council has continued throughout the year, which is available free to Leeds City Council staff and voluntary and community organisations across the city.

Encouraging conversations about death and dying

Death Cafés are an international movement dedicated to encouraging discussion about death and dying in a relaxed environment. We held nine Death Cafes in total this year, both online and in partnership with Leeds City Libraries reaching over 50 people. Going forward we will continue to host a mixture of virtual and in real life Death Cafes.

We were very pleased to hold our annual conference again this year in May, for the first time since 2019, at Thackray Museum, focussing on the recent report of the Lancet Commission on: *The Value of Death: bringing death back into life*. Our conference partner this year was Full Circle Funerals. It was so lovely to be back doing events in real life again after a space of three years. The conference was very successful and we had our largest audience, 100 attendees, we have ever had.

Leeds Bereavement Forum

Trustees' report (continued) for the year ended 31 March 2023

Achievements and performance continued

We are very pleased to have been able to attend events again in person this year, including the Kirkgate Market Dying Matters event in May and community events across the city throughout the year.

Annual General Meeting

Our AGM this year took place online during National Grief Awareness Week, which ran from 2-8 December. Following our AGM business, Ellie Harrison from The Grief Series joined us to watch and discuss her film *These Four Walls : Grief in the pandemic*. These Four Walls is a short film that gives voice to all those who have been bereaved in the UK, drawing on national research exploring experiences of loss and grief during the pandemic to convey the reality of grieving at this unprecedented time. Our AGM was well attended and received very positive feedback

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, this year managing the delayed Dying Matters Week funding from 2020, which took place during Dying Matters Week in May 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 West Yorkshire Integrated Care Board; Leeds City Council; Leeds Teaching Hospital Trust and all our partners across Leeds has become more valuable than ever.

Financial review

The net receipts for the year were £29,505, including net receipts of £27,165 on unrestricted funds and net receipts of £2,340 on restricted funds.

Reserves policy

The charity's free reserves, at the year end were £27,165.

A formal policy on reserves was amended at the Leeds Bereavement Forum (LBF) meeting of the executive committee on 19 April 2023. It states the following requirements:

- Reserves to be maintained at a level which ensures that LBF's core activity could continue during a period of unforeseen difficulty
- Reserves to be maintained at a level that would cover any costs incurred if the charity was forced to close.
- Confirmation of minimum amount needed and maximum amount needed.

The trustees have agreed that reserves amounting to between 3 and 6 months running costs will be maintained, and based on the 2023/24 budget this equates to between £approx £13,000 and £26,500.

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 CIO for the year ended 31 March 2023, which are set out on pages 6 to 9.

Responsibilities and basis of report

As the charity trustees of the CIO 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 CIO'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 Charities Act;
- 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: Katy Sargeant ACA

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 2023

	Notes	2023	2023	2023	2022
		Unrestricted	Restricted	Total	Total
		funds	funds	funds	funds
		£	£	£	£
Receipts					
Grants and donations	(2)	42,772	9,484	52,256	-
Membership, training and conference fees		3,868	-	3,868	-
Bank interest		362	-	362	-
Transfer from Leeds Bereavement Forum charity		28,233	3,603	31,836	-
Sponsorship		250	-	250	-
Total receipts		75,485	13,087	88,572	-
Payments					
Staff costs		38,485	6,512	44,997	-
Travel expenses		65	70	135	-
Trainers fees and expenses		650	401	1,051	-
Training and development		324	-	324	-
Rent, rates, room hire and service charge		4,500	-	4,500	-
Photocopying and printing		1,026	952	1,978	-
Postage and stationery		(111)	152	41	-
Telephone and internet		603	-	603	-
Memberships and subscriptions		85	-	85	-
Insurance		634	-	634	-
Independent examination		420	-	420	-
Dying Matters grants		-	2,660	2,660	-
IT equipment, support, supplies and website		1,112	-	1,112	-
Refreshments		117	-	117	-
AGM costs		50	-	50	-
Professional fees		360	-	360	-
Total payments		48,320	10,747	59,067	-
Net receipts / (payments)		27,165	2,340	29,505	-
Fund balances brought forward		-	-	-	-
Fund balances carried forward	(3)	27,165	2,340	29,505	-

Leeds Bereavement Forum
Statement of assets and liabilities
as at 31 March 2023

	2023	2023	2023	2022
	Unrestricted	Restricted	Total	Total
	£	£	£	£
Cash funds				
Cash at bank	27,136	2,340	29,476	-
Cash in hand	29	-	29	-
Total cash funds	<u>27,165</u>	<u>2,340</u>	<u>29,505</u>	<u>-</u>

Debtors and prepayments

	2023
	£
Debtors	33
Prepayments	317
	<u>350</u>

Assets retained for the charity's own use

1 x Computer (desktop)
 3 x Laptop
 Projector

Liabilities

	2023
	£
Creditors	85
Accruals	441
	<u>526</u>

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 2023

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 2023

2 Grants and donations	2023	2023	2023	2022
	Unrestricted funds	Restricted funds	Total funds	Total funds
	£	£	£	£
NHS West Yorkshire Integrated Care Board	42,622	-	42,622	-
Leeds City Council (LCC)	-	4,500	4,500	-
Volition	-	4,984	4,984	-
Other donations	150	-	150	-
	<u>42,772</u>	<u>9,484</u>	<u>52,256</u>	<u>-</u>

3 Restricted funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
LCC Dying Matters	-	5,369	3,029	-	2,340
LCF Harnessing Power	-	2,734	2,734	-	-
Five Ways to Wellbeing	-	4,984	4,984	-	-
	<u>-</u>	<u>13,087</u>	<u>10,747</u>	<u>-</u>	<u>2,340</u>

Fund name

LCC Dying Matters

LCF Harnessing Power

Five Ways to Wellbeing

Purpose of restriction

Small grants to local organisations during Dying Matters Week 2023

To help staff and volunteers of Neighbourhood Network Scheme groups.

To create and distribute widely across Leeds, two new paper-based resources to help people feel supported around bereavement.

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.