



CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From 1/07/2020

Period start date To 30/06/2021

Period end date

Charity name: Yarm District Lions Club (CIO)

Charity registration number: 1181191

## Objectives and Activities

|  | SORP reference     |   |
|--|--------------------|---|
| Summary of the purposes of the charity as set out in its governing document  | Para 1.17          | <ol style="list-style-type: none"><li>1. The advancement of citizenship</li><li>2. Promoting the voluntary sector for the public benefit</li><li>3. Promoting volunteering</li><li>4. The relief of poverty and the relief of those in need in particular by providing humanitarian aid and disaster relief</li><li>5. The advancement of health or the saving of lives</li><li>6. Promoting for the benefit of the public the conservation protection and improvement of the physical and natural environment</li><li>7. Promoting community participation in healthy recreation</li></ol>   |
| 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 members of Yarm District Lions Club are committed to serving their local community as well as those in need on a wider UK and world basis. Some of the services and activities undertaken by the club and its members are outlined below.</p> <p><b>Advancement of Citizenship:</b> The club and its members strive to form as many links as possible with Yarm Town Council, voluntary, community and faith groups in our geographical area. Pre Covid this included working with Town Council to organise an annual Charities Fair and providing a Santa and Sleigh for the Christmas lights switch on. Donations have been made to youth groups e.g. junior football teams and to Guides to allow them to attend community projects.</p> <p><b>Promotion of Volunteering:</b> All our club members are volunteers and make donations to Lions Clubs International to cover the clubs administration costs and charges for centrally provided services to help us carry out our activities. (e.g. to cover</p> |

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|  |  | <p>insurance, training and legal advice etc). It is a theme of Lions and of our club that every penny we raise from the public at large should be used to help support our service activities. Promoting volunteering is essential to our well being and to achieve the maximum public benefit. We encourage others to volunteer with us so that we can achieve more .Examples are those that help us organise Yarm Fun Run , marshal the run and man the water stations and finish area. We also sponsor youngsters raising funds so they can volunteer to help less fortunate people abroad.</p> <p><b>Relief of Poverty/those in need/humanitarian aid and disaster relief:</b> We make donations to our International Foundation which responds rapidly to environmental crisis e.g.earthquakes,floods, all over the world. We donate to several local specialist charities to help them provide help to those in need. We provided a caravan holiday for a needy group. We collect donated food from a local supermarket and deliver it to a local food bank. We have supported other Lions Clubs who have been providing assistance to those affected by flooding in their area.</p> <p><b>The advancement of health:</b> We distribute messages in a bottle (MIAB) free of charge to elderly and infirm people so their health condition and medication is readily available to the emergency services when called to assist. We also work closely with NE Ambulance service in advertising this service and distributing bottles. We keep a supply of bottles which other Lions Clubs can access if required. We provide lifts to hospital or doctor's appointments for those who require assistance with travel arrangements. We have two collection points for spectacles which we then recycle.</p> <p><b>Promoting the Conservation Protection and improvement of the Physical and Natural Environment:</b> Last November there was an initiative from the Lions Environmental Officer for each Lions Club to plant 10 trees per member. Unfortunately this project hasn't been followed though due to covid.</p> <p><b>Promoting participation in healthy recreation:</b> We organise and manage an annual Fun Run in Yarm ( A virtual run in 2020). Funds raised from this event are mainly used to help promote healthy recreation activity in local community e.g. supporting junior football teams.</p> |
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| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit | Para 1.18 | We confirm that the trustees take full and proper account of the guidance from The Charity Commission on public benefit when determining their responses to requests for assistance and arranging the clubs service activities. |

### **Additional information (optional)**

You may choose to include further statements where relevant about:

|  | SORP reference |  |
|--|----------------|--|
| Policy on grant making   | Para 1.38      |  |
| Policy on social investment including program related investment | Para 1.38      |  |
| Contribution made by volunteers                                  | Para 1.38      |  |
| 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>In July we normally organise Yarm Charities Fair which give several local charities a fund raising opportunity however this year this was cancelled due to covid. On the same day we normally organise Yarm Fun Run this year due to covid we organised a virtual run.</p> <p>In December we normally take Santas Sleigh to Yarm High Street, local shopping complex and local supermarket giving enjoyment to many children who came to see Santa and have their photo taken. This was not possible due to covid so we organised a virtual appeal the money raised was used to issue 120 food vouchers for local supermarkets to people in need. We also made several donations to local charities.</p> |

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|  |  | <p>Again due to covid we were unable to offer lifts so that sight impaired people could attend the local blind society for social contact and a good lunch. Lifts also provided to allow those in need to attend a luncheon club. Lifts provided so people could attend doctors and hospital appointments.</p> <p>A local supermarket has a collection box for groceries at the check outs, we collect these donations and deliver them to a local food bank. At Christmas we also used some of the money raised from virtual appeal to purchase Christmas puddings and stollens for the food bank.</p> <p>We made grants to many local charities and local community groups. This includes three local hospices. Also Lions youth appeals.</p> <p>We organised a caravan holiday in Filey Lions caravan for a deserving family.</p> <p>We collected and recycled 508 pairs of spectacles.</p> |
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#### **Additional information (optional)**

You may choose to include further statements where relevant about:

|  |           |  |
|--|-----------|--|
| Achievements against objectives set                          | Para 1.41 |  |
| Performance of fundraising activities against objectives set | Para 1.41 |  |
| Investment performance against objectives                    | Para 1.41 |  |
| Other  |           |  |

## Financial Review

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|--|-----------|---|
| Review of the charity's financial position at the end of the period              | Para 1.21 | The Charity is in good standing with £3,636 available to fund charitable causes including £300 restricted to specific ventures. This is considered a reasonable balance to cover cash flow and to give the club the capability to make a grant should the need arise. |
| Statement explaining the policy for holding reserves stating why they are held   | Para 1.22 | A reserve of funds is held which is sufficient to cover project liabilities should a project launched fail to generate income.  |
| Amount of reserves held  | Para 1.22 | Typically £2000, the amount is reviewed before making any grants or initiating any activity project.  |
| Reasons for holding zero reserves  | Para 1.22 |   |
| Details of fund materially in deficit  | Para 1.24 |   |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 |   |

### 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 main sources of funds are money collections at local supermarkets and entrance fees to fun runs. |
| Investment policy and objectives including any social investment policy adopted | Para 1.46 |  |
| A description of the principal risks facing the charity                         | Para 1.46 |  |
| Other   |           |  |

## Structure, Governance and Management

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| Description of charity's trusts:  |           |   |
| Type of governing document<br>(trust deed, royal charter)   | Para 1.25 | Constitution and Bylaws   |
| How is the charity constituted?<br>(e.g unincorporated association, CIO)  | Para 1.25 | CIO   |
| 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 | Trustees are appointed through election by Club Members. The procedures are specified in the Constitution and Bylaws documents. |

### 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 |  |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | Part of Lions Clubs International District 105N. |
| Relationship with any related parties   | Para 1.51 |  |
| Other   |           |  |

## Reference and Administrative details

|                             |  |
|-----------------------------|--|
| Charity name                | Yarm District Lions Club (CIO)         |
| Other name the charity uses |  |
| Registered charity number   | 1181191                                |
| Charity's principal address | 12 Goulton Close,<br>Yarm,<br>TS15 9RY |
|                             |  |

### **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  | Ian Fye             |                          |                                   | Yarm District Lions Club                                      |
| 2  | Stuart Hewerdine    |                          |                                   | Yarm District Lions Club                                      |
| 3  | John Millington     |                          |                                   | Yarm District Lions Club                                      |
| 4  | Michael Shepherd    | Treasurer                |                                   | Yarm District Lions Club                                      |
| 5  | Christopher Kendrew | Immediate Past President |                                   | Yarm District Lions Club                                      |
| 6  | Ian Gilg            | Secretary                |                                   | Yarm District Lions Club                                      |
| 7  |                     |                          |                                   |   |
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Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

## Funds held as custodian trustees on behalf of others

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|---|--|
| Description of the assets held in this capacity   |  |
| Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects |  |
| Details of arrangements for safe custody and segregation of such assets from the charity's own assets                         |  |

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
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|                 |      |         |
|                 |      |         |
|                 |      |         |

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

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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information

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## Declarations

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

Signed on behalf of the charity's trustees

|  |                          |  |
|--|--------------------------|--|
| Signature(s)                           | MW Shepherd              |  |
| Full name(s)                           | MICHAEL WILLIAM SHEPHERD |  |
| Position (eg Secretary,<br>Chair, etc) | TREASURER                |  |
| Date                                   | 20.02.2022               |  |