



**Trustees' Annual Report for the period  
1<sup>st</sup> January 2023 - 31<sup>st</sup> December 2023**

Elsie Ever After – CIO - Charitable Incorporated Organisation

Registered Charity Number – 1177173

### **Reference and Administration Details**

#### **Elsie Ever After**

**Registered charity number: 1177173**

**Registered public address:**

Elsie Ever After,  
Innovas, Unit 18,  
Blakemere Village,  
Chester Road,  
Sandiway,  
Northwich,  
CW8 2EB

**Names of charity trustees who manage the charity:**

Helen Lyons	Founder, Chief Executive officer and trustee	From 1 <sup>st</sup> Jan 2018
Gemma Gerrish	Signatory and trustee	From 1 <sup>st</sup> Jan 2018
Victoria Wright	trustee	From 1 <sup>st</sup> Jan 2018
Rebekah Tittle	Chief Financial officer and trustee	From 1 <sup>st</sup> Jan 2018
Jennifer Robinson	trustee	Resigned 15/10/23

**Solicitors who advised on application and constitution:**

Jack Farrer and William Beverley, Weightmans LLP, The Plaza, 100 Old Hall Street, Liverpool, L3 9QJ

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

**Type of governing document:** CIO Foundation Constitution

**How charity is constituted:** CIO – Charitable Incorporated Organisation

**Trustee selection methods:** Appointed by trustees.

**Additional governance:** The charity was formally incorporated on 15<sup>th</sup> February 2018, however prior to this, the charitable activities were conducted under the registered charity Storehouse Church charity number 1088755. Where we refer to prior years’ figures within the report, these relate to charitable activities undertaken during incubation under Storehouse charity and trustees.

New trustees will be given the constitution, latest Trustees’ Annual Report, Statement of accounts and a copy of all policies including safeguarding, privacy and finance.

## **Objectives and Activities**

### **Objects of charity:**

Our charity’s purposes as set out in our constitution are:

- a) To promote the advancement of mental wellbeing to those who have suffered bereavement through the provision of: bereavement counselling, financial support and the provision of access and referral to national bereavement organisations.
- b) To raise public awareness of the needs of bereaved people through delivering bereavement courses.

These come under the charity commission classifications of ‘advancing health or saving of lives’ and ‘Education, training and research’.

### **Ensuring our work delivers these objects:**

We review our objectives and activities each year. This review looks at what we achieved and the outcomes of our work in the previous 12 months. The review looks at the success of each key activity and the benefits they have brought to those groups of people we are set up to help. The review also helps us ensure our objectives and activities remained focused on our stated purposes. We have referred to the guidance contained in the Charity Commission’s general guidance on public benefit when reviewing our objectives and in planning our future activities. In particular, the trustees consider how planned activities will contribute to the objectives they have set.

### **The focus of our work:**

Our main objectives of the year focussed on providing advice and support to bereaved people. We did this by working alongside existing bereavement services and referring families to them wherever possible. If the bereaved person could not get help from existing organisations, then we offered support. This may have taken the form of counselling or financial help to be able to access support; providing books about bereavement; and offering a range of approaches to support, such as creative therapies. Additionally, we signposted professionals to bereavement training and gave advice on supporting people through loss. Our social media also signposts people to bereavement support by posting links to organisations such as the Samaritans during the Christmas season. We also provide advice via social media by linking to articles written by organisations such as Child Bereavement UK and Winston’s Wish. This year, we focussed on a large fundraising event to mark the 10 year anniversary since Elsie died. We also purchased books to make 250 primary bereavement packs. We restocked a range of additional bereavement books by purchasing them ourselves and asking our supporters to ‘gift’ these books to us using an Amazon wish list tool.

### **How our activities deliver public benefit:**

Our vision is that everyone, regardless of location or circumstance, can access bereavement support of their choice. Our main activities and who we have helped are outlined below. These activities are all focussed on promoting the advancement of mental wellbeing to those who have suffered bereavement and are undertaken to further our charitable purposes for the public benefit.

### **Who used and benefitted from our services?**

We provide guidance for any bereaved person – referrals can be made through any means, including self-referral. We mainly work within the Cheshire area, but we have no boundary of support and therefore, will aim to support anyone who contacts us.

This year, we received 56 referrals for individual families (Table 1). We also received an additional 10 referrals from organisations requesting support (see table 2).

Table 1 - Family referrals: 536 in total since beginning in 2014.

Year	No.
2014	30
2015	29
2016	42
2017	32
2018	47
2019	70
2020	84
2021	69
2022	77
2023	56

Table 2 - Organisation referrals: 73 in total since beginning in 2014.

Year	No.
2014	5
2015	4
2016	4
2017	20
2018	6
2019	2
2020	8
2021	10
2022	4
2023	10

This means the total number of people helped via direct referrals over the last 10 years is 2,351 comprising of 456 bereaved adults, 1,645 bereaved children and 250 professionals.

Individual referrals have been made by:

	Family member	Community	Professional	Self-referral
	No.	No.	No.	No.
Over last 10 years	95	88	309	44
2023	17	4	32	3

Organisation referrals over the last 10 years have been made by:

- |                            |                                       |
|----------------------------|---------------------------------------|
| Learning mentors           | Hospitals                             |
| CAMHS                      | Schools                               |
| Community paediatricians   | Churches                              |
| Family intervention worker | Educational psychologists             |
| Mental health team         | Doctor surgeries                      |
| School nurses              | Hospices                              |
| Children’s centre          | Crisis intervention teams             |
| Psychotherapists           | Emotional Literacy Support Assistants |
| Social Care Services       | Universities                          |
| Crematoriums               | Brake charity                         |

The tables below show the different types of relationships people had to the deceased person.

Relationship to deceased: Bereaved adults

	Husband	Wife	Parent	Son or Daughter	Sibling	Wider family member	Friend
	No.	No.	No.	No.	No.	No.	No.
Over last 10 years	58	136	138	97	14	11	2
2023	6	14	22	10	4	1	0

Relationship to deceased: Bereaved children

	Son or Daughter	Sibling	Wider family member	Friend	Unknown
	No.	No.	No.	No.	No.
Over last 10 years	386	124	190	109	657
2023	34	15	26	86	23

Main causes of death over the last 10 years were:

	Accident	Long Term Illness	Murder	Military	Neonatal	SIDS	Sudden Death	Suicide	Unknown	Covid 19
	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
Over last 10 years	28	156	4	1	27	8	99	54	258	12
2023	3	20	0	0	6	1	15	11	15	0

What services were provided?

Types of support we have offered to bereaved people via individual referrals:

	Bereavement pack	Additional books	Signposting to organisations	Counselling	Creative therapies – art / dance	Financial support	Advice
	No.	No.	No.	No.	No.	No.	No.
Over last 10 years	405	212	208	48	22	12	180
2023	43	37	21	3	1	0	24

Types of support we have offered through organisation referrals over the last 10 years:

- Speaking to professionals at courses
- Financial support to host remembering days for bereaved children
- Advice
- Signposting
- Bereavement packs
- Creative dance
- Art therapy
- Counselling
- Leaflets
- Additional bereavement books
- Advising on the design of a remembrance garden at a crematorium

We have provided resources and advice for professionals such as: educational psychologists, psychotherapists, professionals involved with safeguarding, crematoriums, funeral directors, healthcare professionals, learning mentors, Social workers, headteachers, counsellors and Education welfare officers.

- Bereavement packs

On request, we have sent out bereavement packs for children which comprise of a bereavement workbook and a story book about grief. We have 2 types of pack: one for primary aged children and one for secondary aged children. We have additional books for children to address specific circumstances such as explaining suicide, manslaughter, military deaths and when a loved one has a terminal illness. We also offer schools and professionals advice and materials on how to support bereaved young people.

In 2023, we gave away 39 primary packs and 11 secondary packs which is a total of 50 bereavement packs for individual referrals. Additionally, organisations such as schools requested 36 primary packs and 11 secondary packs, totalling an extra 47 packs. Therefore, in total during 2023, we supplied 97 bereavement packs for children. Over the last 10 years, we have given out 967 primary packs and 436 secondary packs to those who have contacted us via individual referrals and from organisations. Over the last 10 years, additional packs were given out to schools, children’s centres, doctors and professionals as part of our big pack giveaways which total over 3,400 packs altogether.

- Creative and talking therapies

Over the last 10 years, 334.5 hours of therapies have been given.

Type of therapy And Number of hours of therapy	Creative therapies – such as dance, music, art therapy.	Talking therapy - counselling	Total therapies provided
Over last 10 years	171	163.5	334.5
2023	50	1.5	51.5

- Speaking at events

The founder, Helen Lyons, has continued working full time hours as a teacher, and therefore, the public work of the charity has had to be scaled down slightly as it is a completely voluntary charity which is run in evenings and weekends outside normal working hours. Therefore, attending events and promoting the work of the charity has been reduced. The priority has been ensuring referrals are responded to in a timely manner and ensuring bereaved people are supported. Helen spoke at the 10 year anniversary event – informing supporters of everything they have helped achieve over the 10 years and discussing the importance of continued support for the future.

Over the last 10 years, Elsie Ever After has spoken to:

Antoinette Sandbach MP, Ian Lucas MP, ITV Granada Reports after receiving a Points of Light Award from the Prime Minister, Reuben’s Retreat charity, Blackpool Clinical Commissioning Group, Directory of services lead for Cheshire, Chester Voluntary Action, Storehouse Church Cheshire, Hospice of the Good Shepherd, St Luke’s Hospice, Alder Centre Liverpool, St Rocco’s Hospice, Child Bereavement UK, A Child of Mine charity, Storehouse Church Shropshire, Children’s centres, Trinity Church, Crisis Intervention Team meeting, Chester University students, Compassionate Communities group, Learning mentors in Ellesmere Port schools, Hope Hospice, Cheshire chord company choir fundraiser, Living Well Dying Well group, Mr and Mrs Theatre company, Link Up Cheshire, Smarties Nursery fundraising events, Safeguarding event for Cheshire West and Chester, Uniting Church coffee morning, Deo Gratias Choir concert fundraising event, Handbag of Harmonies fundraising event, The Joshua Tree charity, Hartford School, Waitrose community green coin event, SANDS, Cheshire West Clinical Commissioning Group and Cheshire Wirral Partnership, Haylo Theatre Company, Young Person’s conference delegates, Northwich Crematorium, Co-op community fund team and Sheriff of Chester events as her chosen charity of the year.

## **Financial Review**

During 2023, the charity received income of £11,128 incurred costs of £8,617 giving a surplus in the year of £2,511. The opening funds were £19,428 and the closing funds were £21,939. The charity’s plan for the year was to utilise opening reserves to provide more bereavement support in line with our charity reserves policy and to replace the bereavement packs by purchasing more books for these. In addition, as it was the charity’s 10 year anniversary, a special fundraising event was held to raise additional awareness and funds.

Income of £11,128 consisted of: Donations of £3,901; 10<sup>th</sup> anniversary fundraising event income of £5,218; donation of merchandise £489, sale of merchandise of £457 and a prior year gift aid reclaim from HMRC of £1,063.

Cost of sales included: bereavement purchases of £4,666, merchandise purchases of £699, Fundraising event costs of £2,912 and a stock movement of £1,319. We started the year with bereavement stock of £7,391, a full stocktake was carried out at the year end to the value of £9,199. Stock is made up of 266 primary packs (approximately £4,123) and 107 secondary packs (approximately £1,772). The remainder relates to bereavement books (£539) and merchandise. Other costs incurred were: insurance £860; website and IT £373; office, postage and stationery costs £426. Opening cash was £12,037 and we closed the year with £12,740. There were no debtors or creditors at the year end.

The overall profit made on the 10 year anniversary fundraising event was £2,306, the operating surplus without this one off event is £205. The extra funds raised will be used in future years to fund the charitable goals.

During 2023, we purchased 81 additional bereavement books to the ones we normally have in stock as well as 476 books to make 250 more bereavement packs. In addition, we were gifted another 54 books. We gave out 97 bereavement packs from individual family referrals and local organisation referrals. In 2024, our opening funds will be used to support bereaved families in line with our policy below. Next year, we anticipate using the remainder of our available funds to restock our bereavement packs when needed, provide bereavement books, counselling and creative therapies and to support bereavement days and services in line with our objectives and vision.



**Financial Statements:**

	£	£
<b>Income</b>		
Grants	0	
Donations	3,901	
Fundraising event	5,218	
Gift aid received relating to prior years	1,063	
Merchandise donated	489	
Sale of Merchandise	457	
		11,128
<b>Cost of Sales</b>		
Movement in Bereavement Stock	(1,319)	
fundraising event costs	2,912	
Bereavement Support Purchases	4,666	
Bereavement Merchandise Purchases	699	
<b>Cost of Bereavement Support</b>		6,958
<b>Gross Surplus/(Deficit)</b>		4,170
<b>Other Expenditure</b>		
Insurance	860	
Website & IT	373	
Office, Stationery & Postage	426	
Travel costs	0	
		1,659
<b>Net Movement in Funds</b>		<b>2,511</b>
Opening Funds:		19,428
Closing Funds:		21,939
<b>Statement of assets and Liabilities 31 December 2023</b>		
Cash		12,740
Stock		9,199
Closing Reserves		21,939

## **Finance policies:**

### **BEREAVEMENT SUPPORT FOR INDIVIDUALS**

- Governing Criteria for support: Support may be offered to anyone who is bereaved under any circumstances in any location. The core team of Trustees must all agree that the grant will improve the mental health of bereaved people and could otherwise not be available.
- The maximum amount that will be spent on bereavement support for any one individual will not exceed £500.
- This limit will be reviewed at least annually by the Board of Trustees.

### **DONATIONS TO OTHER CHARITIES**

- Donations may be made to other Charities whereby the receiving Charity complies with EEA’s vision and objectives.
- All donations to other charities will require prior authorisation by all Trustees.

### **INCOME RECOGNITION**

#### Donations

- The regular donations come from individuals who are known to the trustees, and such donations do not have any conditions attached to them. These donations will be recognised on a cash received basis.
- One off donations through fund raising will be recognised on a cash receipt basis.

#### Trading Income

- Trading income includes all goods and services provided for a fee and can include charitable activities where fees are charged, as well as those trading activities whose trading activities that raise funds for the Charity.
- Turnover is recognised at the fair value of the consideration received or receivable for goods and services provided in the normal course of the charity and is shown net of VAT and other sales related taxes.

#### Grant Income

- Grants will be recognised on a cash received except when they have attached terms and conditions that must be met in order to retain the income.
- Grants with conditions will be held on the balance sheet as deferred income and only recognised when formal notice that the conditions have been met has been received from the awarding body.

### **RESERVES POLICY**

- The Charity will not seek to retain reserves but will look to use the reserves to support the Charitable purpose at all times.
- The Charity however will retain reserves of at least £1,000 at all times. This will safeguard against any drops in income and unforeseen liabilities.
- Any other reserves for specific purposes will be set aside from the Charities general reserves and accounted for separately.
- This reserves policy will be reviewed on an annual basis to ensure that it remains current and appropriate.

**FIXED ASSETS AND DEPRECIATION**

- Tangible fixed assets over £500 will be capitalised and initially recognised at cost and depreciated over the expected Useful Economic Life.
- Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following basis;

Computer Equipment                      3 years straight line

**Declaration**

The trustees declare that they have approved the trustees’ report above.  
Signed on behalf of the charity’s trustees.

Signature

Full name: Helen Lyons

Position: Founder, Chief Executive officer and trustee

Date:

Signature

Full name: Rebekah Tittle

Position: Chief Financial officer and trustee

Date:

Signature

Full name: Gemma Gerrish

Position: Signatory and trustee

Date:

Signature

Full name: Victoria Wright

Position: Trustee

Date:

Approved electronically January 2024. See minutes- meeting 4e.