



Chair's report to Friends of the Calvert Trust (Lake District) Annual General Meeting held Friday 21 November 2025

This report covers the period from 1 July 2024 to 30 June 2025.

THE FRIENDS OF THE CALVERT TRUST (LAKE DISTRICT) is established for the furtherance of the work of the registered charity "THE LAKE DISTRICT CALVERT TRUST 270923". Our purpose is to raise funds for the Trust with a return on investment that is as high as possible.

This year, with a smaller committee, we have once again held a number of excellent and well-received events. The fundraising landscape is tough and while we did not have the attendance we might have hoped for at some of our events, we had excellent feedback from attendees. Our members remain committed and generous and we are grateful for your continued support.

Huge thanks to my committee members Rebecca Brockbank, Dave McConnell-Coy, Alison Miles, John Miles, Carol Moreton and Jane Seymour for your commitment and hard work. I am delighted that Alison Miles joined the committee during the year. Dave's wife Liz also deserves a special mention as an extra pair of hands at many of our events!

The death of longstanding committee member Penny Harding in August 2024 was a shock to us all and she is greatly missed. David Brown stepped down from the committee in October 2024 and we thank him for his support and hard work during his time on the committee. Rebecca Brockbank has also decided to step down from the committee at this AGM, after many years of service to the Friends. We are so grateful to her for all her hard work, commitment and time.

In the 2024/25 financial year our income was £82,612.67, including a legacy of £68,098.84 which was transferred directly on receipt to the Trust. We distributed £5,000 to the Trust, plus £1,000 to continue our sponsorship of Mischief at Calvert Stables. We also pledged £3,650 through the Big Give matched fundraising campaign, and £1,388.66 was donated directly to the Trust following a Friends event at Rheged.

Our income was achieved through our members' subscriptions and donations plus Gift Aid, our collection boxes that are spread across the county and a collection by our volunteers at Cranstons Penrith, and our annual series of events:

- June 2024: talk from polar explorer Nick Cox at Rheged – thanks to Nick for giving his time
- August 2024: Outdoor play The Adventures of Dr Dolittle at Lowther Castle – thanks to Lowther Castle & Gardens for hosting the event and allowing our attendees free entrance
- December 2024: Christmas concert at Lingholm – our grateful thanks to the Seymour family for hosting the event and the team at the Lingholm Kitchen for the excellent refreshments, and to the members of KAOS (Keswick Amateur Operatics Society) for giving their time

Our grateful thanks also go to our brilliant sponsors who enable us to put on our events, covering some of the costs of the events which means ticket sales go directly to support the work of the Trust, and to the many local companies and individuals who provide us with excellent raffle prizes.

Hannah Richardson, Chair of Friends of the Calvert Trust

Report from the Calvert Trust for the Friends AGM

12 months on from the difficult but necessary decision to close our innovative Reconnections neuro-rehabilitation service, the Trust has had a successful year delivering life-changing experiences for people with disabilities. Both Calvert Lakes and Calvert Stables have adjusted well to their restructured teams and have maintained exceptional standards of delivery, despite the wider cost-of-living pressures which continue to impact the disabled community. Our Access Adventure Fund, which provides bursaries to subsidise residential stays, remains essential. Growing this fund will remain a key priority for the year ahead and this year's Big Give challenge during the first week of December will support this fund.

Our year to date in numbers:

- Almost 3,000 people have been supported through residential and activity programmes
- 8,000 sessions provided for the local community at the hydrotherapy pool, including the introduction of new clinically led specialist sessions
- Calvert Stables continues to grow, delivering over 2,600 participant sessions this year

These achievements reflect the dedication and skill of our remarkable staff team, who consistently go the extra mile for our guests.

There is more detail on our work in our latest impact report, which can be found on our website here: [Impact Report 2024](#)

Financially, we continue to make progress towards our growth plan which seeks to rebuild reserves, repay debt, and reinvest in our services and facilities. This year has been about laying strong foundations for future growth following last year's restructure. We've invested in new sales and marketing capacity and introduced improved digital systems to support fundraising. Last winter we completed a major volunteer led refurbishment of our Byres accommodation. This winter we will be bringing our Farmhouse accommodation up to the same high standard.

We continue to forecast a year-on-year increase in cash reserves and with a renewed sales focus on identifying and engaging with new organisations working in the disabled community, forward bookings for 2026 are approximately 10% ahead of last year with a strong pipeline of enquiries and activity. This is a very positive position as we look ahead to 2026 and gives us confidence in achieving our growth plan.

The Trust has leased the Old Windebrowe Tithebarn building the property to New Reflexions, who are developing it into an Ofsted-registered special school for children with learning disabilities. The school, which plans to open in the new year, will also provide residential services for pupils. This development not only brings a valuable new facility to the area but also provides the Trust with a regular and reliable income stream. The school's new Headteacher is already in discussions with us about also using the Trust's facilities, including the stables and hydrotherapy pool.

I hope you can join us for some of next year's events as we celebrate the Trust's 50th anniversary in 2026, a wonderful milestone for everyone involved. On Saturday 21 March 2026 we will be celebrating our 50th 'birthday' with open day event at Calvert Lakes and I very much hope you will be able to join us. See you there!

Sean Day, Chief Executive, Lake District Calvert Trust

Accounts

Friends of the Calvert Trust (Lake District) 1067899					
Receipts and Payments account: Year ending: 30th June 2025					
RECEIPTS			As at 30.06.2025		Previous year
Member's subscriptions				£945.00	£975.00
Member's donations				£2,470.00	£2,500.00
Other donations					
Legacy				£68,098.84	
Gift Aid reclaimed				£1,261.30	£1,655.67
Collection boxes				£836.00	£596.09
Building Society interest				£3.54	£3.57
Events and Activities	Receipts	Payments	Net		
Dr Dolittle	£5,768.00	£3,141.24	£2,626.76		
Nick Cox Rheged	£450.00		£450.00		
Lingholm	£2,677.50	£217.04	£2,460.46		
Cranston Bucket collection	£380.77		£380.77		
Pride and Prejudice	£2,020.00	£250.00	£1,770.00		
Wind in the Willows	£1,250.00		£1,250.00		
Ullswater Cruise	£60.00		£60.00		
Totals	£12,606.27	£3,608.28	£8,997.99	£8,997.99	£11,242.64
NET RECEIPTS				£82,612.67	£16,972.97
OPERATING EXPENDITURE					
Admin.				£50.00	
OPERATING SURPLUS/DEFICIT				£82,562.67	£16,972.97
CHARITABLE DONATIONS					
To Calvert Trust (Legacy)				£68,098.84	£19,000.00
To Calvert Trust (Big give)				£3,650.00	£1,000.00
To Calvert Trust				£5,000.00	
To Calvert Trust (Mischief)				£1,000.00	
TOTAL CHARITABLE DONATIONS				£77,748.84	£20,000.00
NET SURPLUS/DEFICIT				£4,813.83	-£3,027.03
Balance from previous year brought forward				£2,154.42	£5,181.45
RESULTANT BALANCE CARRIED FORWARD				£6,968.25	£2,154.42
ASSETS AND LIABILITIES STATEMENT					
Assets					
Barclays current account				£6,847.70	£2,037.41
Skipton BS account				£120.55	£117.01
Debtors					
Gross Assets				£6,968.25	£2,154.42
Liabilities					
Creditors					
Net Liabilities				£0.00	£0.00
NET FREE ASSETS				£6,968.25	£2,154.42
Note: Dr Dolittle total: £5626.76 (£3000 cr. In 2023-24 accounts)					
Note: Nick Cox total: £1987.53 (£1388.66 cr. directly to CT, plus £148.87 cr. In 2023-24 accounts)					
Note: Play sponsorship: Total £2750, however £250 was credited to the 'Friends' in error.					
Total sponsorship therefore £2500. I have allocated the two plays £1250 each.					
John Miles					
Treasurer					

Independent Examiner's Report to the Trustee of The Friends of the Calvert Trust (Lake District) for the year ended 30th June 2025

Registered Charity No. 1067899

I report to the Trustee on my examination of the accounts of the Friends of the Calvert Trust (Lake District) (the Trust) for the year ended 30th June 2025.

Responsibilities and basis of report

As the charity trustees of the Trust 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 Trust's accounts 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

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 Trust 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: 

Date: 20.11.25

David Shingler
Independent Examiner
2, Syke Road
Wigton
Cumbria