Energize Shropshire Telford and Wrekin

Annual Report and Statutory Accounts 2025/26

For the year ended 31 March 2026

Supporting healthier, more active communities across Shropshire, Telford and Wrekin

Company number 08066413 | Charity number 1147861









At a Glance

A year of development and evolution for Energize Shropshire Telford and Wrekin, marked by team growth, new place-based investment, and continued delivery across the county.

This document combines our annual narrative report with the statutory financial statements. It is structured to provide a clear overview of governance, performance and financial stewardship while retaining the full underlying statutory content.

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Reference and Administrative Details

Trustees:

Linda Ann Collins-Izquierdo (Chair)

Paul Havenhand (Former Chair. Retired from Board July 2025)

Liza Freudmann (Senior Independent Director)

Robin Pritchard (retired from the Board April 2026)

Sarah Evans

Victoria Sugden

Kalpna Ahir-Parkash (retired from the Board June 2026)

Tim Smith

Fiona Jones

Sue Wells

Company Secretary: H Madden

Chief Executive: P Ezard

Senior Leadership: H Cade

J Bradbury

S O'Shea

Company Registration Number:	08066413
Charity Registration Number:	1147861
Principal Registered Office:	Darwin House, 2 The Mount, Shrewsbury SY3 8HQ

Auditor: Independent Auditors LLP, Shrewsbury Business Park, Shrewsbury SY2 6LG

Bankers: CAF Bank Ltd, 25 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4AQ

Virgin Money, Jubilee House, Newcastle Upon Tyne, NE3 4PL

Flagstone Savings Investment Platform, 1st Floor, Clareville House, 26-27 Oxendon Street, London SW1Y 4EL

Comments from the Chair

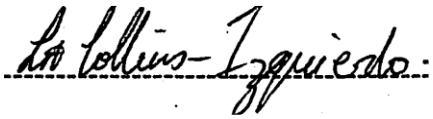
As a long-standing Trustee and previous Senior Independent Director (SID), I am privileged to have been appointed to the role of Chair for Energize STW.

Firstly, I echo the CEO's comments in recognising the contribution to the Board of the previous Chair Paul Havenhand between 1st April and August 2025.

I would also like to recognise and commend the drive and commitment of all the members of the team and my fellow trustees who, continue to ensure we deliver on our vision: "To one day eliminate inactivity so that everyone can enjoy the benefits of an active lifestyle."

We recognise that achieving sustained impact and positive outcomes alongside addressing the wider challenges associated with inactivity, can be accomplished by working closely with partners across health and social care, education, and local communities. This has been strengthened across Telford & Wrekin and Shropshire in 2025 by significant investment from Sport England. This continues to be instrumental in supporting the systematic development of place-based working.

Energize STW remains exceptionally well placed not only financially, but also through its well-earned reputation and outstanding staff to make an even greater impact in 2026/27.



Linda Collins-Izquierdo
Chair

Comments from the Chief Executive Officer

This year has been one of development and evolution for Energize Shropshire Telford and Wrekin, as we welcomed a new Chair, grew our team and celebrated two significant Sport England Place investments to support more targeted work across the county

After a year in post, we sadly had to say goodbye to our then Chair, Paul Havenhand. Paul had brought a new perspective to the organisation bringing his strategic and governance skills to the fore. We thank Paul for his positive impact on Energize STW and wish him well in the future.

In his place we appointed from within and following eight years as a Trustee, we welcomed Linda Izqueirdo as our new Chair. This has been a great appointment for the organisation and Linda is already having a positive impact by implementing change across our governance structures and bringing the Board and Team closer together.

Our team has grown in the last twelve months. We have appointed a Programme Manager for Active Communities with a particular focus on our place-based work in Donnington and a Programme Manager for Children and Young People to continue working on our Creating Active Schools programme. Through our Place investment we have appointed an Apprentice Business Administrator and a Strategic Lead for Place. All of them have brought new energy and ideas to Energize and we look forward to seeing their growth and impact in the future.

Significantly, we have received additional investment to implement place-based approaches when addressing inequalities and physical inactivity across both Shropshire and Telford & Wrekin local authority areas. Not only will this increase opportunities for people to be more active, but we will be able to work more systemically with key partners across public, health and voluntary sectors to create the conditions for healthier more active lifestyles.

I would like to thank both the Board and the team for the outstanding commitment to the ambitions of the organisation and the positive impact we are having on individuals and communities across Shropshire, Telford and Wrekin.



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Pete Ezard
Chief Executive Officer

Trustees' Report

Objectives and Activities

The purposes of the charity as set out in its governing document.

The Objects of the Charity (as stated in the Articles of Association) are for the benefit of the inhabitants of Shropshire, Telford and Wrekin and the surrounding area to preserve and protect good health including but not exclusively through raising awareness of and promoting, opportunities for participation in physical activity, sport and recreation.

1. Relieve those in need by reason of age, ill health, disability, financial or other disadvantage, including but not exclusively through promoting the provision of facilities, services and infrastructure, and award grants to facilitate participation in physical activity, sport and recreation.

2. to advance education in the subjects of sport, physical activity and recreation; including but not exclusively by carrying out and publishing insight and research and through providing training programs, courses, and the development of resources; and

3. to promote community participation in healthy recreation through the facilitation of community participation in physical activity and recreation, including but not exclusively by the coordination of sporting, recreational and physical activities capable of promoting good health.

The main activities undertaken in relation to those purposes.

The main focus for Energize over the last 12 months has been to continue shifting our work from transactional projects and programmes to transformational work to change cultures and embed sustainable changes into education, health and social care and wider community systems and networks.

The evidence base for everyone moving more on a daily basis to support good physical and mental health, is huge and unchallenged. One of the core priorities of the NHS 10-year plan is prevention and again, as documented by the Chief Medical Officer, there is no better way to prevent ill health than physical activity.

So, in theory, with the huge evidence base and alignment with the NHS strategy, it would appear straightforward to embed moving more as a concept into all the organisations, policies and practices required to make a fundamental difference to those who need it most across Shropshire, Telford & Wrekin. Sadly, this is not the case, and this is the reason for our continued work to influence everywhere we can.

During 2025/6, we have been able to secure significant additional Place Partnership funding from Sport England to focus on the places which need the most support and aim to create long-term systemic change through collaboration with local authorities, voluntary and community sector organisations, and the NHS. The funding has allowed us the capacity to bring together people from these different perspectives to work on local priorities aligned to Sport England's four outcomes of increasing activity, reducing inactivity, positive experiences for children & young people and tackling inequalities.

These place-based partnerships, particularly in Telford & Wrekin, which started in 2025, are already seeing the benefits of bringing together people from health, active travel, planning, data & insight, and the voluntary sector to focus on creating positive change in the borough. It is still very early but this different approach, moving away from projects and short-termism to a strategic discussion on where the barriers are and how we can break them down, already feels, no matter how challenging, the best way forward.

Across the whole team we are now working out how to connect existing projects or programmes into place-based work so that we gradually move away from a single focus area and move towards joined-up approaches, working collaboratively with other organisations to create change and ultimately see the numbers of inactive people decreasing.

Our aims, including details of the issues we seek to tackle and the changes or differences we seek to make through our activities and how that will further our legal purposes.

As stated in our 2022-27 Strategy, our purpose is to improve quality of life through the benefits of physical activity. Our ambition is to eliminate inactivity, first focusing on those who are inactive, as this is where we can gain the greatest positive impact.

The change we seek is a reduction in the number of people in Shropshire, Telford & Wrekin who are regarded as inactive.

Our strategies for achieving our stated aims and objectives.

For the remainder of our 5-year Sport England funding period, from 2022-2027, we have three strategic goals:

- **To tackle inequalities** | Focusing our efforts and resources on those who need it most.
- **To embed & sustain** | Supporting relevant organisations to embed physical activity into their culture, policies and futureproofing through workforce education.
- **To influence system change** | Sharing our learning to develop relationships and create opportunities to influence and ultimately change local systems.

The criteria or measures we use to assess success in the reporting period.

We have a series of processes which we use to measure progress and success.

All staff have monthly one-to-one meetings with their line manager. These meetings focus on the individual's health and wellbeing, progress, achievements, challenges, and development needs. Longer-term goals are reviewed quarterly, and the operational plan is updated accordingly.

Secondly, the operational plan. All members of the team have goals recorded in the operational plan which is updated quarterly with a rating from 1 to 10 to reflect progress against that individual goal from '1-3' slow progress to '10' complete.

Thirdly, the summary of the operational plan along with updates from all team members on the impact, what is going well and any learning from all our different projects, programmes and areas of work is added to the quarterly progress report. This report is shared with the Board of Trustees each quarter ahead of their board meeting.

Fourthly, we use our marketing and CRM platform – HubSpot, to manage and track stakeholder relationships both at an individual level and for specific sectors. On a quarterly basis we assess progress from emerging and developing to thriving relationships with all our stakeholders.

Finally, on a six-monthly basis we complete a very detailed report for Sport England to update on changes that have happened in the organisation or to our policies that have helped achieve our

goals, how we have worked more collaboratively, met the needs of our local communities, contributed towards changing conditions for more people to be active and supported the outcomes of Sport England's strategy 'Uniting the Movement'.

Achievements and performance

The main achievements of the charity including achievements against objectives set

The fourth year of our current strategy has seen significant progress against our overall objectives. We have many examples now of how we have influenced policy change through relationship building, collaboration and co-production. These examples are included below. However, as usual in our annual reports, we like to start with an update on our most important asset, our people.

Our People

On the Board of Trustees, following the resignation of Paul Havenhand, Linda Collins-Izquierdo was appointed as Chair in January 2026. Robin Pritchard resigned at the end of his term with us in April 2026.

There were no resignations from the team during the year however we were sad to lose Anna Martin as her part-time contract as part of the green social prescribing project with Shropshire Wildlife Trust came to an end in December 2025.

It has been fantastic to welcome two new members to the team, who both joined in September 2025. Firstly, Sam Ostermeyer has joined as our new Active Schools Manager and secondly, Charlotte Davies was recruited into a new role as Apprentice Business Administrator to primarily support our place-based work in Telford & Wrekin. They have both integrated into the team quickly and easily.

It has also been great to welcome back Amy Griffiths to the team, following her maternity leave. Amy returns in a new role, as Strategic Lead for Place.

We are also very well supported by our independent consultant Fran Taylor as our Finance Lead. In total this means we now have 15 employees plus Fran.

Within our People Plan, launched in April 2023 and reviewed on an annual basis, we have four key areas of focus to ensure we do everything we can do to have a happy and engaged team. Here are the highlights under each of these areas.

Recruit

Over the last year, we have built on our inclusive recruitment practices and added to our processes to continually improve how we do this. The aim is to make it as easy as possible for as many people as possible to see any job vacancies we have, to apply and be part of an Energize recruitment process. Examples of recent improvements include using the Hemingway readability checker to ensure we are using accessible language, explaining to interview candidates that they can dress casually with no need for expensive formal wear, can be paid for transport to the interview and bring any notes along with them to help answer questions, which we share in advance.

Understand

The monthly 1-to-1s are a consistent way of ensuring we listen to and understand all team members. In addition, our subscription to *Workleap Officevibe* gives us the tools for sharing positive feedback between team members, fortnightly staff engagement surveys and a report on overall satisfaction based on all this data.

Every year we also take part in the annual Active Partnerships network wide people survey. This is incredibly comprehensive and gives us a great insight into the areas to focus on for our team.

Although not solely about understanding the needs of our team, the weekly online catch ups, monthly in person team meetings and our quarterly away days, all give a chance for listening, sharing and gaining greater insight into what is going well and where we need greater focus as a team.

Retain

Working with an Active Partnership recommended HR partner, Lanes HR, we have conducted a thorough job evaluation of all roles within the organisation. This provides us with clarity on exactly why each role sits at the level it does and gives us a framework for conversations about the criteria for a more senior role. This information will work well in conjunction with the review of competencies from the Personal Development Reviews (PDRs) allowing us to see where someone is at from a competency perspective but also if their roles and responsibilities are relevant for their contracted role when we look at the evaluation criteria.

This is important, as clarity on all of the above was one of the key pieces of feedback from the team in the 2025 and 2026 annual Active Partnership People surveys.

We continually review our staff terms and benefits and this year we have added the opportunity for everyone to take up to two volunteer days each year to encourage and support employees who wish to become or who are already involved in volunteering and to recognise the contribution that they make.

We were also able to award all staff a 3% pay rise in recognition of achievements across the team and in support of continued cost of living challenges.

A large part of our success in retaining the talent within our team, is down to the less formal opportunities which we continue to have every month. From team day activities like table tennis, tennis or cycling, festive nights out, to picnic lunches in the summer and maybe our most fun yet, from January to March 2026 we played our very own game of The Traitors which many people felt really helped get the year off to a great start.

Develop

In January 2026, we launched a new annual Personal Development Review (PDR) process with a focus on understanding where everyone is against standard Energize competencies. This has given us a benchmark to help us create development plans and also to review in January 2027 to see progress individually and as a team.

We have a generous training budget which is available for team-wide and individual development plans. Based on feedback from the team, this year the team-wide focus is on place-based working and system leadership. We will hopefully work with the Sport England Leading the Movement team to deliver the latter. In addition, we still invest in the Charity Learning Consortium online platform for our essential training needs.

We are also supporting two members of the team with Level 3 apprenticeships through Sports Structures, and another team member finished their apprenticeship and received a distinction in their level 5 in leadership and management in February 2026.

Finally, there have been two promotions in the team. Firstly, our Marketing & Communications Officer has been promoted to Programme Manager Marketing & Communications and secondly, one of our Empowering Communities Managers has been successfully seconded to a new position as Strategic Lead for Place aligned with our Place Partnership investment.

Other key achievements

Overall organisational achievements.

- The last year has been one of significant change for Energize STW. Change that will potentially shape the culture and focus of the organisation in the years ahead.

  Through being able to provide evidence of our capability and knowledge of our County, we have been successful in gaining Sport England funding to support place-based work in both Telford & Wrekin and Shropshire. The funding received to date almost doubles our income; although the amount towards increased capacity in our team only accounts for a small percentage of the total.

  Since the first funding for place partnership work in Telford & Wrekin was approved in Autumn 2025, huge strides have been made to drive this work forward. This has included creating and leading the strategic oversight group, developing action plans for the key themes of work, recruiting people into shared and new roles to work as part of a collaborative, cross-sector team and onboarding an evaluation and learning partner.

  Place-based working is a relatively new concept for Energize and until 2025, only one team member was operating in this way, focused on Donnington in Telford. Now with funding for Shropshire in addition to Telford & Wrekin, the last quarter of 2025/6 has been utilised to engage the whole Energize team and help integrate existing work programmes into a more 'whole system approach' way of thinking. This practical and cultural shift away from working individually on projects and programmes to a more transformative approach is in the very early days, but good progress has already been made.
  Going forward we anticipate a greater focus on delivering work across themes
  in specific places, but for this year's report, it is important to capture the achievements of all our individual areas of work.

- Building on our Creating Active Schools framework we are now sharing further information with schools' networks via improved, targeted and planned communications. This includes developing our existing work with two Multi Academy Trusts (MATs), through the creation of half-termly communities of learning that bring school stakeholders together in person.

  Relationships are being developed with Headteachers and Executive Board members across more Academy Trusts and local authority schools. This is enabling us to influence key decision makers in the system and demonstrate the use of physical activity more broadly across teaching and learning. As an example of this the Empower Trust have adopted CAS across three new schools and through that process have also identified a CAS Champion to further influence schools and teachers across the Trust.

- Over the past year, the School Games programme has continued to create positive opportunities for children and young people across Shropshire, with a strong focus on inclusion, engagement, and increasing physical activity levels. More than 500 young people participated in School Games and Virtual School activities in the final quarter alone, while throughout the year hundreds more took part in county finals, inclusion events, fishing sessions, This Girl Can events, and place-based activities. In Donnington, targeted work with local primary schools has delivered particularly strong impact, including a 20% increase in pupil activity levels over 12 months. New after-school boxing and squash clubs were established, averaging 14 pupils per session, alongside staff training and equipment provision to help schools sustain activity opportunities during PE, lunchtimes, and after-school provision. The programme has also supported young leadership development through

training and hands-on experience, with 22 Young Leaders helping deliver events across the county.

Alongside direct delivery, significant progress has been made in strengthening partnerships and improving the long-term sustainability of physical activity opportunities for children and young people. New sponsors have been secured to support School Games events, new schools and senior leaders have joined county alliance groups, and continued collaboration with local providers such as Donnington Boxing Club and Shropshire Squash has expanded the extracurricular offer available to pupils. Inclusive opportunities have also grown through the return of Sportsability events and specialist sessions delivered at the Cavalier Centre. Despite ongoing uncertainty around the national School Games review, the programme has maintained strong momentum locally, continuing to support schools, build staff confidence, and provide more children and young people with enjoyable, accessible, and positive experiences to be active.

- Over the past year, the Virtual Schools programme has continued to provide valuable opportunities for looked after children and young people to access new experiences, develop confidence, and build positive relationships through physical activity. A wide range of activities were delivered across the year, including skiing and ice-skating trips, paddleboarding and canoeing sessions, trampoline activities, and planned cricket development sessions, enabling many children to try activities for the first time in supportive environments. Partnership work with Shrewsbury Town Foundation also created opportunities for young people to complete the Gamechangers coaching award, helping them develop leadership and coaching skills that can support future education, employment, and confidence-building. Strong feedback from children, carers, and staff highlighted the positive impact these experiences had on wellbeing, enjoyment, and participation. Importantly, a new two-year SLA agreement has now been secured, providing greater stability and allowing the programme to focus on longer-term, sustainable engagement rather than one-off activities, while increased collaboration with local authority Virtual School teams and a stronger focus on youth voice will help shape future opportunities for looked after children across the county.

- Elevate our strength and balance classes for those 60+ in Shropshire have now been going for nearly eight years. Over the past year, the Elevate programme has continued to provide vital strength and balance support for older adults across Shropshire, helping local people improve confidence, mobility, wellbeing, and social connection while reducing isolation and supporting independent living. Despite ongoing uncertainty around future funding and system changes, the programme has maintained strong demand and continued to receive increasing referrals from both primary and secondary care. Elevate has also expanded its focus beyond traditional falls prevention, developing new pathways linked to frailty, deconditioning, cardiac rehabilitation, and long-term health conditions. Work with hospital teams and wider health partners has helped shape community-based support for people transitioning out of hospital care, with a particular emphasis on rebuilding strength, confidence, and reducing avoidable decline after discharge. Alongside this, investment in instructor development has created a highly skilled workforce with specialist qualifications in long-term conditions, helping ensure local residents can access safe, evidence-based support within their communities.

  The programme has also made significant progress in influencing the wider health system and positioning community-based physical activity as an important part of preventative healthcare. Elevate has become increasingly involved in strategic conversations around prevention, ageing well, frailty, and falls pathways, while contributing to neighbourhood meetings, Shropshire Integrated Place Partnership (ShIPP) development work, and ongoing discussions with cardiac rehabilitation teams and other health partners. New referral pathways are being developed to improve continuity of care between clinical services and community provision, helping bridge gaps in support once formal rehabilitation ends. The

programme's preventative approach strongly aligns with NHS priorities around reducing hospital admissions, supporting long-term condition management, and delivering more integrated care closer to home. Although system uncertainty and funding challenges remain, Elevate has built strong credibility across the health sector, demonstrated the value of community-led prevention, and laid important foundations for future innovation and partnership working across health and care services.

- The Green spaces project aimed to encourage people to access outdoor spaces and move more in nature and improve their overall health and well-being. As well as creating many engaging resources and videos to support the whole sector to continue this focus, two Green Network events collaborating with 36 different organisations took place in 2025. The project has now ended although the Green Network has now been taken on by Shropshire Wildlife Trust to continue the connectivity with green providers, in addition several recommendations have been made following end point evaluation and data captured from surveys. These include focusing on building sustainable capacity in the green sector, exploring investment into permanent project officers, improving administrative processes to maximise funding impact, building flexibility into funding governance structures and empowering green providers to feel equal contributors.

- The All-in Short Breaks provision for special educational needs and disabilities (SEND) children and young people and their families contracted and supported 15 providers to deliver sessions during the last year. After being the lead organisation in a consortium contracted to deliver the Shropshire All In Short Breaks programme for SEND children, young people and their Parent Carers over the last 5 years, we made the difficult decision to not apply for the future contract from April 2026. Although it connected with a key demographic for us, the commission was very transactional and did not align to our system thinking. To provide some legacy we explored options to access training for providers, utilising their feedback and available funds to support them to continue to develop opportunities for SEND children and young people. Actio has contracted with 27 providers since April 2021, generating£734,177.40 in match funding.

- Over the past year, the Sport Welfare offer has continued to strengthen support for local clubs and groups, helping them create safer, more inclusive, and better-supported environments for participants and volunteers. Engagement with clubs and National Governing Bodies of sport has grown steadily, with support ranging from light-touch advice to intensive development work across ten clubs, two NGBs, and a county body. Practical support has included welfare officer training, governance guidance, safeguarding support, youth voice work, policy reviews, and club visits. Strong progress was seen through partnerships with organisations such as Telford Netball Club and Donnington Runners, helping clubs improve welfare structures, strengthen volunteer confidence, and develop more sustainable and inclusive approaches. Clubs have increasingly engaged with topics such as neurodiversity, participant voice, and culture change, recognising that welfare extends beyond policies and compliance into everyday experiences for members and volunteers.

  Alongside direct club support, the programme has successfully delivered and developed a range of partnership-based workshops and forums covering safeguarding, DBS processes, active bystander awareness, neurodiversity, and inclusive practice. Collaborative work with organisations including Disability Rights UK and Activity Alliance has expanded opportunities for clubs to improve accessibility and inclusion, while regional and national recognition of the work has continued to grow through presentations, case studies, and wider sharing of effective practice. The development of resources, welfare packs, and ongoing peer support has helped volunteers feel more visible, connected, and supported in their roles. Although challenges remain around club capacity, volunteer time, and funding pressures, the Sport Welfare offer has built stronger relationships across the local sport sector and helped clubs

create more positive, welcoming, and sustainable environments for local people to take part in sport and physical activity.

- Throughout the year, work in Donnington has built strong foundations for long-term community improvement through increased partnership working, resident engagement, and opportunities for children and families. More than 400 school children were introduced to local activity providers through School Games events, leading to new after-school boxing and squash opportunities in local schools. Community wellbeing events brought together over 100 residents and 20 stakeholders, helping families access support services, physical activity, and social opportunities in a welcoming environment. The launch of Family Hubs, development of LiveWell Hubs, and creation of the Activity Provider Network have strengthened local support systems and improved coordination between organisations. Significant progress was also made in establishing "Donnington Together", giving residents a stronger collective voice and clearer identity for future community-led action.

  Over the course of the year, engagement and communication across Donnington continued to grow, with over 200 community surveys completed, more than 1,000 Parish Post copies distributed, and high levels of stakeholder involvement maintained through regular meetings and workshops. Feedback gathered from residents, schools, and partners has helped shape priorities around community safety, youth provision, healthcare access, and better local communication. The successful recruitment of a Community Navigator hosted within a local VCSE organisation, marks an important step forward in strengthening local connections and helping residents access opportunities and support more easily. While challenges remain around awareness of community provision and participation, there is clear momentum, growing trust, and strong commitment from local partners and residents to continue building a more connected, informed, and active community in Donnington.

- Over the past year, the Get Yourself Active (GYA) work has made significant progress in embedding physical activity within the adult social care system across Shropshire and Telford & Wrekin. Strong partnerships have been developed through steering groups, subgroups, and collaboration with national organisations including Disability Rights UK, Activity Alliance, Moving Social Work, and Durham University. The programme has successfully engaged a wide range of professionals and people with lived experience, with 246 social workers, 30 carers, and 16 physical activity providers completing GYA training, alongside growing participation in workshops and co-production activity. The work has also strengthened regional and national connections, opened doors to new sectors and departments, and established a robust evaluation framework to capture system change and long-term impact.

  A key achievement has been the growing recognition of the importance of movement and physical activity within social care practice. Movement-based questions are now being embedded into care assessments delivered through social workers, a huge step forward into changing systems and the culture around physical activity and movement. In addition to this, targeted awareness campaigns and test-and-learn pilots have been funded, and resources are being co-produced to support professionals and residents alike. The Being Active survey generated 796 responses, providing valuable insight into barriers, opportunities, and the need for greater awareness of accessible activities, the full report is due to be shared in Summer'26. Positive feedback from training and workshops highlighted the value of practical, achievable approaches to movement, particularly the message that "small movements count." Despite challenges around capacity and engagement, the programme has created strong momentum, increased collaboration across sectors, and laid important foundations for long-term cultural change that can improve health, wellbeing, and inclusion for disabled people and those accessing social care support.

- Over the past year, the work focusing on Severe Mental Illness (SMI) has continued to build positive and sustainable opportunities for people living with SMI through regular, community-based activity sessions. AFC Telford sessions consistently engaged 6–10 participants each week, with attendance and confidence growing over time alongside strong feedback about the positive impact on wellbeing, social connection, and routine. The programme has also supported pathways into wider activities, volunteering opportunities, and additional social elements, helping participants build longer-term connections within their community. Providers have developed increased confidence and skills in supporting people with SMI, with this work receiving wider recognition through award nomination opportunities, while successful funding secured for AFC Telford means sessions can continue for at least another year. Although challenges remain around long-term funding, awareness, and measuring system-wide impact, the work has created meaningful progress in reducing isolation, improving wellbeing, and strengthening inclusive opportunities for vulnerable residents. As a result of this opportunity one of the AFC Telford Coaches was nominated for an award through Telford Mental Health Forum and Telford and Wrekin Council for 'Going the Extra Mile', a testament to the great work they delivered supporting people with SMI to engage in their community setting.

- Community Group Support. Over the past year, support provided to community groups, clubs, and organisations has helped strengthen local opportunities for people to be active, particularly for under-represented communities and people living with Parkinson's. Continued partnership work with Parkinson's UK has enabled organisations to access guidance, build confidence, and develop stronger applications for the Parkinson's UK Physical Activity Grant. Targeted support was provided through meetings, application reviews, and connections with local Parkinson's communities, helping organisations such as Tai Chi Friends and The New Saints Foundation progress their plans. At the same time, Parkinson's activity sessions have continued to develop locally, with ongoing promotion and stronger referral pathways being explored to increase participation and long-term impact for people living with Parkinson's.

  Alongside this, extensive support for community clubs and groups has helped organisations improve sustainability, strengthen delivery, and secure new funding opportunities. More than 50 organisational enquiries were supported each quarter through tailored advice, funding guidance, and development support, resulting in successes including £9,360 secured through the Sport England Movement Fund for Noors Women's Interfaith Group and all three supported Parkinson's Physical Activity Fund applications being successful. Additional support through the WMCA Triage Project, mentoring opportunities, and ongoing partnership working has helped organisations build skills, increase resilience, and better engage local communities. This work has strengthened local networks, improved access to inclusive physical activity opportunities, and created stronger foundations for community groups to continue supporting residents in the future.

Future Plans

At the end of 2025/6 it feels as if we are at a really pivotal time for Energize. The funding period for most of our work comes to an end in March 2027 and we are awaiting the new 5-year plan from Sport England to hear more about funding from 2027 onwards. Once we understand more about the role for Active Partnerships from next year, we will need to review and assess the skills, resources and capacity we require to deliver it from 2027 onwards.

The change in ways of working from a project or programme approach to a more collaborative place-based, whole system approach is still relatively new for us. As we work through 2026/7 we will explore how best to lead the team on this journey, how to navigate the complex and changing systems and partners we need to work with, whilst still meeting our existing goals. It is going to be a challenging year.

We also have to meet the Code for Sport Governance Tier 3 requirements which now include having a plan in place for Environmental Sustainability and ensure these principles are embedded into all our work internally and externally.

Finally, our new Chair and the Board have agreed to implement changes to the way we operate and in Q2 of 2026/7 we will have a change to board champion roles and to how our sub-committees operate and report. This will need us to reflect on internal approaches to ways of working and reporting, to support the overall organisational governance.

Finance Review

Reserves Policy

The Board continually review Energize STW's Reserve Policy. The Charity SORP describes "reserves" as the part of the charity's unrestricted funds that is freely available to spend on its charitable purposes. It has been identified that reserves should be held for the following reasons:

- To provide a buffer in relation to income streams that are particularly volatile;
- To fund restricted cashflow deficits which arise at certain points during the year;
- To cover other operational commitments, notably staffing costs which are not fully funded through grants received;
- To offer the ability to seize unexpected new initiatives; and
- To give some shelter from unplanned adverse events.

Financial resources required to respond to these factors have been calculated between £250,000 and £300,000. Free reserves at the end of March 2026 were £301,091 which is only slightly in excess of this range.

Going Concern

As a System Partner within the Active Partnership network, Energize STW has secure funding to 31st March 2027 from Sport England. (Further funding from April 2027 is anticipated and details will follow in the summer of 2026). This coupled with the continued support from local strategic commissioners enables the Trustees to have a reasonable expectation that adequate resources are available to continue in operational existence up until that point. They have reviewed budgets and cash flow forecasts for a period of more than twelve months from the finalisation of these financial statements and for these reasons the going concern basis continues to be adopted in preparing the financial statements.

Structure, Governance and Management

Energize Shropshire, Telford and Wrekin (Energize STW) is a Company Limited by Guarantee; the registration numbers are shown within the footer on this document. Energize STW was incorporated on May 11th 2012 and registered as a Charity on 27th June 2012. Energize STW is governed by its Memorandum and Articles of Association, as amended in September 2012, October 2015, November 2017, November 2018, November 2020 and currently under review in 2026.

During the year ended 31st March 2026, Energize STW continued to be governed by a Board of Trustees, as listed above. Energize STW Trustees also act as the Directors for the purposes of Company Law. The Board of Trustees meets at least every quarter to discuss the strategic direction and financial condition of the charity, ensure its core aims and objectives are met in the most efficient way and to take account of any risks to the charity and to make sure that all legal obligations are satisfied. Additionally, the following sub-committees meet on a quarterly basis to discuss specific areas of performance or compliance, which is then fed back to the wider board for their full understanding and approval. Terms of reference are available upon request for the following:

- Audit Committee
- People Committee
- Remuneration Committee
- Nominations Committee

Additionally, we have working groups and champions from the Board in areas of Safeguarding, Welfare & Safety and Equity Diversity and Inclusion.

Copies of our Diversity Policy and Diversity and Inclusion Action Plan can be viewed on our website at www.energizestw.org.uk.

Energize STW is an equal opportunity employer who seeks to recruit a workforce with diverse backgrounds and skills. Energize STW makes its services available to all and will go out of its way to educate its staff in order to maintain these values and open up opportunities to all. Energize STW records and publicly documents the ethnicity, gender and other key characteristics of its Board and staff.

The Champion Roles for each Trustee and the Terms of Reference for each sub-committee are regularly reviewed and approved at Board level. A Nominations Committee meets as required to act upon trustee recruitment and will when required call upon assistance from external consultants to ensure the Board consists of trustees that meet required skill sets and who represent the values of Energize STW.

In the year ended 31st March 2026, our former Chair P Havenhand stepped down and was replaced by L Collins-Izquierdo initially as interim chair from July 2025 and then unanimously and formally appointed as Board Chair from October 2025. Two Trustees were formally reappointed for a second term also in the October 2025 Board meeting and an Associate Director was advanced to become a full Trustee.

All our Trustees offer their services voluntarily and they are not remunerated for their time or efforts other than the reimbursement of out-of-pocket expenses. None of the Trustees has a personal pecuniary beneficial interest in the company. All of the Trustees are members of the company and guarantee to contribute £1 in the event of a winding up of the company.

In addition to the Trustees there are nominated Observers (with no voting rights) from both Shropshire Council and Telford and Wrekin Council. Sport England's representative also has an open invitation to observe Board meetings.

Decision making within the organisation is undertaken in accordance with the Board's Delegations of Authority.

Quarterly Board Meetings:

Meetings of the Trustee Board are conducted quarterly and Minutes recorded at each meeting.

Compliance and Strategy:

Upon appointment, all Trustees sign an Engagement Agreement that sets out the duties and commitment expected of a Trustee during their period of appointment. Separate agreements are signed by the Chair and each Board Champion. Furthermore, each Trustee is asked to sign a Conflicts of Interest document each year and to update this at each quarterly Board meeting and is also required to sign and adhere to a Directors Code of Good Conduct.

Energize STW can confirm that there have been no significant declarations of conflicts of interest during the past year.

The Company does not recognise any individual Director as a person of 'Significant Influence or Control'.

The Board is supported by Energize STW's Chief Executive, Its Company Secretary, Directors and operational staff team, who conduct day to day business.

As a Charity and Company Ltd by Guarantee, Energize STW aims to achieve high standards of Governance and we ensure that this happens in the following ways:

- We can evidence how we meet the criteria detailed with the UK Governance Code for Sport. Where further work for compliance is required, we have recorded this as part of an action plan and this is agreed with our Board. We regularly review our compliance with the Code and any failure to comply is identified as a risk needing mitigating action on a risk register stored within the RiskMate platform.

  We recognise that all organisations operate within a risk environment associated with their strategic and operational objectives. The Board is confident that Energize STW operates within the risk appetite of the Trustees and recognises that those relating to maintaining good governance, robust financial management and effective engagement with our partners and other stakeholders are fundamental.

- Policy and procedure documents are regularly reviewed and approved in rotation, including Financial Procedures, which are overseen by our Financial Management Consultant, annually Audited and approved at full Board level. Policies and procedures are captured for efficiency within a workbook each for Finance, Governance and Administration.

- Terms of Reference for sub-committees are reviewed and approved at Board level at least every other year and sometimes more frequently as the need arises.

- Energize STW publicly displays, through its website, copies of our key financial accounts; strategy; governance structure; Articles of Association; Equity & Diversity policy and diversity review. Together with details of our pledges toward inclusion and the environment.

- We have established a Nominations Committee to further develop Board and Chair recruitment. The Nominations Committee is Chaired by either the Board Chair or the Senior Independent Director depending upon the role to be recruited. We base our

recruitment of trustees upon a regularly reviewed skills matrix and in accordance with our equity, diversity and inclusion policy.

- We use the expertise of our People Committee to review staff satisfaction, motivation, wellbeing and human resource policies. We continually monitor staff satisfaction through Officevibe questionnaires, one-to-one meetings and engage in the Active Partnerships annual satisfaction survey to benchmark our results with similar organisations.

- We review Trustee and staff skills and regularly conduct review and development meetings with both Trustees and staff.

- Systems of Internal Control are reviewed, and Risk Management Policy and procedure are overseen at Audit Committee and presented to the wider Board for approval. Ongoing review of risk is carried out at Director level and mitigation reviewed by the Audit Committee and presented to the wider board along with an overview of other areas for consideration within board papers.

- The Trustee Board has oversight of and approves the Energize STW Strategy, which links directly to team and individual goals and workplans.

- Energize STW requires all Trustees, Company Secretary and staff to undertake induction and continuing professional development to familiarise themselves with the funding and the environment in which the company operates; to set out their respective roles and responsibilities; and to ensure accountability and compliance with statutory Charity and Company Law. Opportunities to attend training sessions to further enhance understanding and compliance are offered to both Trustees and the operational team.

Energize STW can show defined purpose, mission and values, which are reviewed and developed through consultation with both Trustees and staff.

Quality and Control:

Energize STW adhere to strategic goals which are detailed in a progress report presented at each quarterly Board meeting.

We adhere to internal and external control processes, including those which effectively monitor financial control. Independent Auditors were re-appointed by the Board as our external Auditors for the year. The appointment of Auditors is approved annually and reviewed regularly. Financial Statements are reviewed at monthly management accounts level with the Chief Executive Officer. Directors review financial progress quarterly and, reports are communicated and discussed with the Audit Committee and the wider Board.

Annually our external Auditors review our financial statement. Annual financial reports are approved by the wider Board of Trustees.

There were no significant lapses in data security during the reported year.

Energize STW are an Active Partnership, membership of which helps us both to share experiences and insight and also learn from others as well as working collaboratively when required. However, it does not interfere with the organisation’s independence.

Key Risks

Energize STW continues to use a real-time risk reporting system. Strategic risks are identified and assessed, and systems, controls or procedures are put in place to manage them.

From the latest review, the highest risks were as follows

- Safeguarding incident/concern related to poor practice
- Reduction in Funding
- Cyber Security

Working to support vulnerable children and adults continues to expose Energize to safeguarding issues and concerns. Regardless of mitigation the Board recognise the importance of maintaining Safeguarding as a high-level risk which needs constant scrutiny. As such, policies and practices are continually reviewed and monitored through Directors, Safeguarding Groups and Board Champion for Safeguarding.

Trustees' Responsibilities Statement

The Trustees (who are also directors of Energize Shropshire, Telford and Wrekin) are responsible for preparing the Trustees' Annual Report, including the strategic report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice). Company law requires the trustees to prepare financial statements for each financial year. Under company law the trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles of the Charities SORP 2019 (FRS 102)
- Make judgements and estimates that are reasonable and prudent
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- There is no relevant audit information of which the charitable company's auditor is unaware; and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

The Trustees' Report is approved and authorised for issue by the Trustees and signed on their behalf by:

L Collins-Izquierdo

6th August 2026

Linda Collins-Izquierdo
Chair

.....

Date

Independent Auditors Report

Energize Shropshire Telford and Wrekin Audit Report Unqualified

Independent Auditor's Report to the Members of Energize Shropshire Telford and Wrekin

Opinion

We have audited the accounts of Energize Shropshire Telford and Wrekin (the 'charitable company') for the year ended 31 March 2026 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and the Notes to the Accounts, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' (United Kingdom Generally Accepted Accounting Practice).

In our opinion the accounts:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2026 and of its profit/loss for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with international Standard on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the accounts section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the accounts in the UK, including the FRC's Ethical Standard, and the provisions available for small entities, in the circumstances set out below, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.
Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees' report and accounts, other than the accounts and our auditor's report thereon. The trustees are responsible for the other information.

Our opinion on the accounts does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the accounts, our responsibility is to read the other information and, in doing so consider whether the other information is materially inconsistent with the accounts or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the accounts or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinion on other matters prescribed by the Companies Act 2006

In our opinion, based upon the work undertaken in the course of the audit:

- the information given in the trustees' report for the financial year for which the accounts are prepared is consistent with the accounts; and
- the trustees' report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate and proper accounting records have not been kept, or returns adequate for the audit have not been received from branches not visited by us; or
- the accounts are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the accounts in accordance with the small companies regime and take advantage of the small companies' exemptions in preparing the trustees' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement found in the trustees' report, the trustees (who are also the directors of the charitable company for the purpose of company law) are responsible for the preparation of the accounts and for being satisfied that they give a

true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of accounts that are free from material misstatement, whether due to fraud or error.

In preparing the accounts, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the accounts

We have been appointed under section 145 of the Charities Act 2011 and report in accordance with the Act and relevant regulations made or having effect thereunder.
Our objectives are to obtain reasonable assurance about whether the accounts as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that the audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these accounts.
A further description of our responsibilities for the audit of the accounts is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of this report

This report is made solely to the company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state of the company's members those matters we are required to state to them in an auditors' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charity's members as a body, for our audit work, for this report, or for the opinions we have formed.

Independent Auditors LLP
Signed: ……
For and on behalf of Independent Auditors LLP, Chartered Accountants and Statutory Auditors
Emstrey House North
Shrewsbury Business Park
Shrewsbury
Shropshire
SY2 6LG

19th August 2026
Date: ……

Statutory Financial Statements

The following pages present the audited statutory accounts for the year ended 31 March 2026, including the primary statements and supporting notes.

Statement of Financial Activities

(Incorporating Income and Expenditure Account)

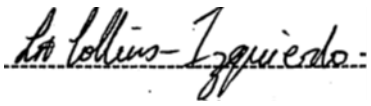
	Note	Unrestricted funds	Restricted funds	Total year ended 31 March	Total year ended 31 March
		2026	2026	2026	2025
		£	£	£	£
Income:					
Donations and legacies	2	1,250	515,000	**516,250**	559,450
Charitable activities	3	226,275	236,908	**463,183**	444,016
Other trading activities	4	20,536	-	**20,536**	23,296
Investments		21,106	-	**21,106**	22,614
Total income		**269,167**	**751,908**	**1,021,075**	**1,049,376**
Expenditure:					
Charitable activities	5, 6	236,723	793,155	**1,029,878**	922,971
Total expenditure		**236,723**	**793,155**	**1,029,878**	**922,971**
Net income/(expenditure) before transfers		32,444	(41,247)	**(8,803)**	126,405
Transfer between funds	15	26,494	(26,494)	-	-
Net income/(expenditure) and net movement in funds		**58,938**	**(67,741)**	**(8,803)**	126,405
Reconciliation of funds:					
Total funds brought forward		393,436	194,084	**587,520**	461,115
Total funds carried forward	15	**452,374**	**126,343**	**578,717**	**587,520**

Balance Sheet

	Notes	2026	2025
		£	£
Fixed Assets			
Tangible assets	11	**1,285**	**3,359**
Current Assets			
Debtors	12	76,415	84,290
Cash at bank and in hand		603,852	655,887
		680,267	**740,177**
Current Liabilities			
Creditors: amounts falling due within one year	13	(102,835)	(156,016)
Net current assets		**577,432**	**584,161**
Total assets less current liabilities		**578,717**	**587,520**
Net assets excluding pension asset or liability		**578,717**	**587,520**
Defined benefit pension scheme liability	14	-	-
Net assets		**578,717**	**587,520**
Funds of the charity			
Restricted funds			
Restricted income funds		126,341	194,084
	15	126,341	194,084
Unrestricted funds			
Designated funds	15	150,000	150,000
General funds	15	302,376	243,436
Total charity funds		**578,717**	**587,520**

Registered Company number: 08066413
The entity was entitled to exemption from audit under section 477 of the Companies Act 2006. The members have not required the entity to obtain an audit for the year in question in accordance with section 476 of the Companies Act 2006. However, an audit is required in accordance with section 144 of the Charities Act 2011.
The Trustees acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of financial statements. The financial statements have been prepared in accordance with the provisions applicable to entities subject to the small companies regime.

The financial statements were approved and authorised for issue by the Trustees and signed on their behalf
by:



17th August 2026

…… ……

Linda Collins-Izquierdo, Chair **Date**

Statement of Cashflows

For the Year Ended 31 March 2026

	2026 £	2025 £
Cash flows from operating activities		
Net income per Statement of Financial Activities	(8,803)	126,405
Adjustments for:		
Depreciation of property, plant and equipment	2,074	3,537
Decrease/(Increase) in trade and other receivables	25,375	(40,554)
(Decrease)/Increase in trade and other payables	(70,681)	88,437
Net cash provided by operating activities	**(52,035)**	**177,825**
Cash flows from investing activities		
Payments for property, plant and equipment	-	(1,941)
Net cash used in investing activities	**-**	**(1,941)**
Net increase in cash and cash equivalents	**(52,035)**	**175,884**
Cash and cash equivalents at the beginning of the year	**655,887**	**480,003**
Cash and cash equivalents at the end of the year	**603,852**	**655,887**
Components of cash and cash equivalents		
Cash and bank balances	603,852	655,887
	603,852	**655,887**

The notes on the following pages form part of these financial statements

Notes to the Financial Statements

For the Year Ended 31 March 2026

1. ACCOUNTING POLICIES

1.1. Basis of preparation

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

Energize Shropshire Telford and Wrekin meets the definition of a public benefit entity under FRS 102.

Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

The financial statements are prepared in sterling, which is the functional currency of the entity and rounded to the nearest £.

1.2. Change in basis of accounting or to previous accounts

There has been no change to the accounting policies (valuation rules and method of accounting) since last year and no changes have been made to accounts for previous years.

1.3. Judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

1.4. Going concern

Having considered future plans and forecast financial budgets, the Trustees confirm that they are not aware of any material uncertainties with regard to the Charitable Company's ability to continue as a going concern for the foreseeable future and therefore have prepared these financial statements on the going concern basis.

1.5. Fund accounting

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

Designated funds These are unrestricted funds earmarked by the trustees for particular purposes.

Revaluation funds These are unrestricted funds which include a revaluation reserve representing the restatement of investment assets at their market values.

Restricted funds These are available for use subject to restrictions imposed by the donor or through terms of an appeal.

1.6 Income

Recognition of income	Income is included in the Statement of Financial Activities (SoFA) when the charity becomes entitled to, and virtually certain to receive, the income and the amount of the income can be measured with sufficient reliability. Where income is received in advance of entitlement of receipt, its recognition is deferred and included in creditors as deferred income. Where entitlement occurs before income is received, the income is accrued.
Income with related expenditure	Where income has related expenditure the income and related expenditure is reported gross in the SoFA.
Donations and legacies	Voluntary income received by way of grants, donations and gifts is included in the SoFA when receivable and only when the Charity has unconditional entitlement to the income. In relation to grants, the balance of income received for specific purposes but not expended during the period is shown in the relevant funds on the Balance sheet.
Donated services and facilities	These are only included in income (with an equivalent amount in expenditure) where the benefit to the Charity is reasonably quantifiable, measurable and material. On receipt, donated services and facilities are recognised on the basis of the value of the gift to the Charitable Company which is the amount it would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognised in expenditure in the period of receipt.
Volunteer help	The value of any volunteer help received is not included in the accounts.
Investment income	This is included in the accounts when receivable.

1.7 Expenditure

Recognition of expenditure	Expenditure is recognised on an accruals basis. Expenditure includes any VAT which cannot be fully recovered and is reported as part of the expenditure to which it relates.
Expenditure on charitable activities	These comprise the costs incurred by the Charity in the delivery of its activities and services in the furtherance of its objects, including the making of grants and governance costs.
Grants payable	All grant expenditure is accounted for on an actual paid basis plus an accrual for grants that have been approved by the trustees at the end of the year but not yet paid.
Governance costs	These include those costs associated with meeting the constitutional and statutory requirements of the Charity, including any audit fees, costs linked to the strategic management of the Charity, together with a share of other administration costs.

1.8 **Taxation**

The charity is exempt from corporation tax on its charitable activities.

1.9 **Tangible fixed assets and depreciation**

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life:

Computer equipment 33% Straight line

1.10 **Trade and other debtors**

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

1.11 **Cash and cash equivalents**

Cash and cash equivalents comprise cash at bank and on hand, demand deposits with banks and other short-term highly liquid investments with original maturities of three months or less.

1.12 **Trade and other creditors**

Short term creditors are measured at the transaction price. Other creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

1.13 **Financial instruments**

The Charitable Company only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are recognised as amortised cost using the effective interest method.

1.14 **Pension costs**

Defined contribution plan

The Charitable Company operates a defined contribution plan for its employees. A defined contribution plan is a pension plan under which the company pays fixed contributions into a separate entity. Once the contributions have been paid the company has no further payments obligations. The contributions are recognised as expenses when they fall due. Amounts not paid are shown in accruals in the balance sheet. The assets of the plan are held separately from the company in independently administered funds.

1.15 **Company status**

Energize Shropshire, Telford and Wrekin is a company limited by guarantee registered in England and Wales and consequently does not have share capital.

Notes 2 Income from Donations and Legacies:

	Unrestricted 2026 £	Restricted 2026 £	Total 2026 £	Total 2025 £
Grants and donations	-	515,000	**515,000**	550,700
Donated services and facilities	1,250	-	**1,250**	8,750
	1,250	515,000	**516,250**	**559,450**

	Unrestricted 2025 £	Restricted 2025 £	Total 2025 £
Grants and donations	-	550,700	**550,700**
Donated services and facilities	8,750	-	**8,750**
	8,750	550,700	**559,450**

Donated goods, facilities and services received	Total 2026 £	Total 2025 £
Office premises	**-**	7,500
IT subscription (see note 19)	**1,250**	1,250
	1,250	**8,750**

Note 3 Income From Charitable Activities:-

	Unrestricted 2026 £	Restricted 2026 £	Total 2026 £	Total 2025 £
Grants	-	236,908	**236,908**	247,257
Strategic commissioning	226,275	-	**226,275**	196,759
	226,275	236,908	**463,183**	**444,016**

	Unrestricted 2025 £	Restricted 2025 £		Total 2025 £
Grants	-	247,257		**247,257**
Strategic commissioning	196,759	-		**196,759**
	196,759	247,257		**444,016**

Note 4 Income From Other Trading Activities:

	Unrestricted 2025 £	Restricted 2026 £	Total 2026 £	2025 £
Sponsorship and advertising	6,000	-	**6,000**	8,000
Other income	14,536	-	**14,536**	15,296
	20,536	-	**20,536**	**23,296**

	Unrestricted 2025 £	Restricted 2025 £	Total 2025 £
Sponsorship and advertising	8,000	-	**8,000**
Other income	15,296	-	**15,296**
	23,296	-	**23,296**

Note 5 Analysis Of Expenditure By Activities

	Unrestricted	Restricted	Total	Total
	2026	2026	2026	2025
	£	£	£	£
Expenditure on charitable activities				
Direct programme expenditure	189,502	132,218	**321,720**	256,191
Direct staff costs	43,299	210,259	**253,558**	238,457
Grants made	-	8,926	**8,926**	-
	232,801	351,403	**584,204**	**494,648**
Support and governance costs				
Support staff costs	-	303,081	**303,081**	274,035
Premises expenses	-	29,655	**29,655**	20,196
Legal & professional fees	180	50,758	**50,938**	45,479
Subscriptions	-	4,311	**4,311**	30,460
Other office costs	665	20,390	**21,055**	20,944
Advertising and marketing	42	17,444	**17,486**	15,228
Staff training	-	3,342	**3,342**	7,282
Travelling	-	4,808	**4,808**	4,280
Sundry expenses	961	1,424	**2,385**	772
Depreciation	2,074	-	**2,074**	3,537
Governance costs	-	6,539	**6,539**	6,110
	3,922	441,752	**445,674**	**428,323**
Total expenditure 2026	236,723	793,155	**1,029,878**	
Total expenditure 2025	191,132	731,839		**922,971**

Note 6 Analysis of Income and Expenditure By Fund Provider

	Sport England	Local Authority	Other public sector income	Non public income	Total
	£	£	£	£	£
Income					
Revenue grants	709,106	-	42,802	-	**751,908**
Commissioning	-	226,275	-	8,133	**234,408**
Sponsorship	-	-	-	6,000	**6,000**
Other	-	-	-	28,759	**28,759**
Expenditure					
Direct programme expenditure	(92,816)	(186,219)	(39,144)	(3,541)	**(321,720)**
Staff costs	(509,796)	(43,299)	(3,544)	-	**(556,639)**
Grants made	-	(8,750)	-	(176)	**(8,926)**
Premises expenses	(29,655)	-	-	-	**(29,655)**
Legal & professional fees	(50,758)	-	-	(180)	**(50,938)**
Subscriptions	(4,311)	-	-	-	**(4,311)**
Other office costs	(20,277)	(850)	(114)	187	**(21,054)**
Advertising and marketing	(17,444)	-	-	(42)	**(17,486)**
Staff training	(3,342)	-	-	-	**(3,342)**
Travelling	(4,808)	-	-	-	**(4,808)**
Sundry expenses	(1,424)	(379)	-	(581)	**(2,384)**
Capital expenditure	-	-	-	(2,074)	**(2,074)**
Governance costs	(6,539)	-	-	-	**(6,539)**
Total surplus/(deficit) 2026	**(32,064)**	**(13,222)**	**-**	**36,485**	**(8,801)**
Total surplus/(deficit) 2025	59,477	25,321	5,464	36,143	126,405

Note 7 Analysis of Grant Provided

Activity or programme	Grants to Institutions	Total	Total
	2026	**2026**	**2025**
	£	**£**	**£**
Telford Workforce	176	**176**	-
SIP Data & Insight	8,750	**8,750**	-
	8,926	**8,926**	**-**

Note 8 Net Income Before Transfers

	2026	2025
This is stated after charging:	**£**	£
Auditors' remuneration	**6,438**	6,040

Note 9 Trustee Remuneration and Expenses

	2026	2025
	Number	Number
Number of trustees paid expenses	2	2
	£	£
Total expenses reimbursed to trustees	101	71

The nature of the reimbursed expenses related to travel. No charity trustee was paid or received any remuneration or other benefits in the year.

Note 10 Staff Costs:

	2026	2025
	£	£
Salaries	**477,083**	450,892
National Insurance	**55,145**	40,616
Pension costs	**24,411**	20,984
Total	**556,639**	512,492

	2026	2025
	£	£
Total employee benefits received by key management personnel	**219,017**	204,153

	2026	2025
	Number	Number
Average headcount	14	13

Note 11 Tangible Fixed Assets:-

	Computer equipment
	£
Cost	
At beginning of year	45,442
Additions	-
At end of year	45,442
Depreciation	
At beginning of year	42,083
Charge for the year	2,074
At end of year	44,157
Net Book Value	
At 31 March 2026	**1,285**
At 31 March 2025	3,359

Note 12 Debtors

	2026	2025
	£	£
Trade debtors	**50,158**	58,987
Prepayments and accrued income	**26,257**	25,303
	76,415	84,290

Note 13 Creditors

	2026	2025
	£	£
Trade creditors	**44,578**	4,128
Other taxes and social security	**14,548**	22,979
Other creditors	**3,863**	2,845
Accruals and deferred income	**39,846**	126,064
	102,835	156,016

	2026	2025
	£	£
At beginning of year	**118,060**	40,271
Released to income in year	**(118,060)**	(40,271)
Deferred in year	**26,785**	118,060
At end of year	**26,785**	118,060

Note 14 Pension Commitments

Pension Commitments

Defined contribution plans

The Charitable Company operates a defined contributions pension scheme. The assets of the scheme are held separately from those of the Charitable Company in an independently administered fund

Note 15 Movement in Funds – Year Ending 31 March 2026

2026	Balance at beginning of year	Income	Expenditure	Transfers	Balance at end of year
	£	£	£	£	£
Restricted funds					
Sport England - Systemic Partner	135,937	515,000	(572,467)	(21,731)	**56,739**
Sport England - Delivery Partner	3,181	49,050	(52,859)	-	**(628)**
Sport England - Sport Welfare	31,459	38,508	(58,323)	-	**11,644**
Sport England - Place-Based Expansion	-	106,548	(50,522)	-	**56,026**
Green Social Prescribing	4,763	42,802	(42,802)	(4,763)	**-**
SIP Data & Insight	17,567	-	(15,750)	-	**1,817**
Other restricted grants	1,177	-	(434)	-	**743**
	194,084	751,908	(793,157)	(26,494)	**126,341**
Unrestricted funds					
General fund	243,436	42,892	(5,974)	22,022	**302,376**
Designated funds:					
Local authority work	-	226,275	(230,747)	4,472	**-**
Sustainability project (investment in people)	150,000	-	-	-	**150,000**
	393,436	269,167	(236,721)	26,494	**452,376**
Total funds	**587,520**	**1,021,075**	**(1,029,878)**	**-**	**578,717**

Restricted funds:

Sport England – Systemic and Delivery Partner

Prior to April 2022, Sport England ran an invited investment process as part of their 10 year Uniting the Movement strategy to establish a portfolio of system partners to develop and create opportunities for all people to take part in sport and physical activity. Energize STW was selected to join this portfolio to deliver a series of projects designed to achieve a set of defined goals. In addition to funding agreed support and infrastructure costs, a particular focus has been agreed in relation to insight and learning. The delivery element funds school games and active lives survey costs. The programme commenced 1st April 2022 and runs until 31st March 2027. The transfers between funds relate to reallocation of capacity costs to better reflect activity during the period.

Sport England – Sport Welfare

Funding gained from Sport England linked to a new national network of 'Sport Welfare Officers' (SWOs). Our Sport Welfare Officer leads on the delivery of a range of welfare and safeguarding related functions. Providing National Governing Bodies of sport and sports clubs with Shropshire, Telford & Wrekin with appropriate support, advice and guidance to ensure good welfare practices and safer club environments for all participants.

Sport England – Place Based Expansion

Funded through Sport England for Telford and Wrekin and more recently Shropshire also, Place-based working has been progressed to engage the whole Energize team and integrate existing work programmes into a more 'whole system approach' way of thinking. This practical and cultural shift away from working individually on projects and programmes to a more transformative approach is in the very early days, but good progress has already been made.

Going forward we anticipate a greater focus on delivering work across themes
in specific places, but for this year's report, it is important to capture the achievements of all our individual areas of work.

Green Social Prescribing

Project in partnership with Shropshire Wildlife Trust funded predominantly by Shropshire County Council UKSPF. To support more accessible, appealing and safe green activities to help people get outside, finding the right kind of activities to benefit people's individual needs and the raising of awareness of existing activities with development of opportunities for diverse groups and those with mental health difficulties.

SIP Data & Insight

A project funded by Shropshire County Council and delivered in partnership with Community Resource, Hands together Ludlow, Shropshire youth Association and Qube, with Energize as the host organisation.

Other Restricted Grants

Any legacy funds or new funds with a value of less than £5,000.

Designated Funds

Sustainability Project – The total fund at the year end was £150,000. This fund is yet to be drawn on but it is anticipated that this will be utilised in year ending 31st March 2027.

Local Authority and Commissioning Work

The organisation undertakes a number of projects which are commissioned by local authorities and other public bodies. Whilst these are not restricted funds, due to the public nature of the activities the charity is keen to ensure transparent and clear reporting of the relevant financial transactions. The transfers represent support costs required and agreed for the delivery of the projects.

2025	Balance at beginning of year	Income	Expenditure	Transfers	Balance at end of year
	£	£	£	£	£
Restricted funds					
Sport England - Systemic Partner	101,045	550,700	(513,867)	(1,941)	**135,937**
Sport England - Delivery Partner	(5,841)	73,348	(64,326)	-	**3,181**
Sport England - Sport Welfare	17,136	53,251	(38,928)	-	**31,459**
Sport England - Moving Communities	-	26,400	(26,400)	-	**-**
Green Social Prescribing	-	60,970	(56,207)	-	**4,763**
SIP Data & Insight	17,567	-	-	-	**17,567**
Falls Prevention	-	20,925	(20,925)	-	**-**
Patient Flow Capacity		5,311	(5,311)	-	**-**
Other restricted grants	-	7,052	(5,875)	-	**1,177**
	129,907	797,957	(731,839)	(1,941)	**194,084**
Unrestricted funds					
General fund	181,208	69,553	(16,803)	9,478	**243,436**
Designated funds:					
Local authority work	-	181,866	(174,329)	(7,537)	**-**
Sustainability project (investment in people)	150,000	-	-	-	**150,000**
	331,208	251,419	(191,132)	1,941	**393,436**
Total funds	**461,115**	**1,049,376**	**(922,971)**	**-**	**587,520**

Note 16 Analysis of Net Assets Between Funds

2026	Unrestricted	Restricted	Total
	£	£	
Fixed assets	1,285	-	**1,285**
Debtors	70,732	5,683	**76,415**
Cash at bank and in hand	435,682	168,170	**603,852**
Creditors	(55,323)	(47,512)	**(102,835)**
Defined benefit pension scheme liability	-	-	**-**
Funds	**452,376**	**126,341**	**578,717**

2025	Unrestricted	Restricted	Total
	£	£	£
Fixed assets	3,359	-	**3,359**
Debtors	52,686	31,604	**84,290**
Cash at bank and in hand	458,280	197,607	**655,887**
Creditors	(120,889)	(35,127)	**(156,016)**
Funds	**393,436**	**194,084**	**587,520**

Note 17 Reconciliation of Net Debt

	At 1 April 2025	Cash flows	At 31 March 2026
	£	£	£
Cash and cash equivalents	655,887	(52,035)	**603,852**
Net debt	**655,887**	**(52,035)**	**603,852**

Note 18 Commitments

The total future minimum least payments under non-cancellable operating leases are as follows:

	2026	2025
	£	£
Not later than 1 year	13,715	13,715
Later than 1 year and not later than 5 years	1,000	14,715
	14,715	28,430

Note 19 Related Party Disclosures

During the year, one Trustee made available at no cost the use of risk management software. The value of this was £1250.

There were no other related party transactions during the year.

The Charitable Company is limited by guarantee and has no share capital, thus no single party controls the Charitable Company.