CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 April 2025 To 31 March 2026

Charity name: The Josephine Sara Charity for Dementia Wellbeing

Charity registration number: 1178209

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The relief of elderly people with dementia by building and operating a care home or by providing such facilities as are deemed appropriate for their care.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	Continuing our aim to enhance Wirral care home gardens we have now completed 2 garden "Hugs" which give residents in both care homes a private and calm place to sit and enjoy fresh air and sensory planting. We are working on the final episode of our podcast, "Remember, design with dementia in mind" We are now going to plan the next podcast.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.13	We have taken the Charity Commissions public benefit guidance into account when making any decisions it is relevant to.

Additional information (optional)
You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The garden Hug which we have designed in 2 Wirral care home gardens is a bespoke sitting area, designed specifically for the space available although the idea is adaptable to any outside space. This demonstrates that even a small or shady or awkward area can provide a much needed outside sitting facility, so important to well being and health for people with dementia as well as staff. We are promoting this idea and reinforcing the fact that it is replicable and doesn't need to be expensive to put together.

Additional information (optional)
You may choose to include further statements where relevant about:

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

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Accounts are attached. There has been little financial activity in the past 12 months.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Reserves are presently low as we have not actively sought funds, a policy will be developed once we are active.
Amount of reserves held	Para 1.22	

Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

Additional information (optional)
You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution dated 24 April 2018
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Appointed by Trustees by resolution

Additional information (optional)
You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The organisational structure comprises the 3 trustees plus 2 additional team members.
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	The Josephine Sara Charity for Dementia Wellbeing
Other name the charity uses	
Registered charity number	1178209
Charity's principal address	35 Caldy Road West Kirby Wirral CH48 2HF

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Antonia Sara Kelly	Chair		
2	Margaret Scott	Treasurer		
3	Sally Whelan	Secretary		
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Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

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

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

Exemptions from disclosure

Reason for non-disclosure of key personnel details

Other optional information

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)	
Full name(s)	ANTONIA SARA-KELLY
Position (eg Secretary, Chair, etc)	CHAIR
Date	29 June 2026