

SHEFFIELD FAMILY HOLIDAY FUND

Annual Report for 2023

Chairman's Update for 2023

I am pleased to report that the Sheffield Family Holiday Fund has raised £25,080 this year. Our charity would struggle to exist without the unstinting support of local trusts and foundations. Our core trust and foundation supporters contributed £21,850 a slight decrease from £23,750 in 2022. I am extremely grateful to these organisations for believing in our cause and giving Sheffield families a helping hand. I am delighted to bring the Charles and Elsie Sykes Trusts on board for the first time this year.

Having lost a few of our individual donors during 2023, we have also gained some new supporters that I hope will continue to support the SFHF moving forward. A special mention must go to Mr and Mrs Ferretti for hosting their open garden event and selling the most wonderful cakes and bakes to visitors.

During 2023, the charity purchased shares in the JPMorgan Claverhouse Investment Trust. Due to the timing of the purchase this has had a small impact on our dividends increasing them to £2,585 this year from £2,449 in the previous one. The three investment trust holdings we have including the City of London Investment Trust and Merchants Trust are ensuring a steady income for the charity to guarantee holidays for families year on year.

In 2023, I am delighted to report that 381 individuals have had their lives positively impacted by the SFHF. 109 children and 85 adults benefited from a holiday. 114 children and 73 adults had the opportunity to experience a day trip. All the families are from the Sheffield postcode region and you can see a full breakdown of the postcodes in the Impact Report. Families now have the opportunity to work closely with their referrer and the Family Holiday Charity (FHC) to choose the location of their break and they have a choice of accommodation for their holiday. Many families chose traditional caravan holidays to the east coast, in and around Skegness and Scarborough. Other families took the opportunity to stay in log cabins or to travel further afield to the west coast to visit Morecambe or Cockerham Sands.

Please read Emma's story in the Impact Report to gain an insight and understanding of just what a break can mean to a family.

With additional funding from the SFHF, the FHC arranged for three different groups to enjoy a day trip. The families were referred to the FHC via the Sheffield Community Partnership, a primary school and the Sheffield Council Special Guardianship Service. They all attended the pantomime at the Sheffield Lyceum Theatre. All of the families had never experienced the pantomime before and many had never even set foot within a theatre. All the feedback has been outstanding from the referring organisations and the families. It is pleasing to know that at a very difficult time for many families, the SFHF were able to give them the opportunity to escape the rigours of everyday life and enjoy time together.

Providing these holidays and day trips all comes at a cost. And at present, costs are rising rapidly. The cost of a holiday has doubled. The FHC also supports all families with additional funds to cover their travel, entertainment and food expenses. Providing this additional support takes stress away from families and truly enables them to relax during their breaks. The focus very much for the SFHF and the FHC is to provide a quality holiday for families. It is important for families to have a positive experience and create memories

that will last a lifetime. The FHC reported that 93% of families said their holiday had a positive impact on their family's mental health and wellbeing.

Our focus for 2024 is to aim to raise £30,000 that will continue to provide holidays and day trips for Sheffield families. The demand for holidays continues to surge and more families are being plunged into poverty during the current recession and cost of living crisis. I call on all our trustees and supporters to help us spread the word about our charity in 2024 and encourage people to donate or raise money to help our cause.

I'd like to thank the staff at the FHC for all their support and advice throughout the year and for doing such a wonderful job in allocating our holidays and short breaks to people within our region. A special mention must go to Mags Rivett and Kat Lee for their ongoing support and advice. I am grateful for the quality of reporting they have sent to us from the families and I am looking forward to working with them in 2024.

Thank you also to James Parker and Ellie Ford at Investec. Ellie joined the SFHF as a trustee in October last year. Investec's support is invaluable, providing us with advice whilst also a regular meeting space and refreshments. James will be leaving Investec but staying on as a trustee.

I'd like to go on record to make a special mention of one of our trustees Jim Fulton. Jim has now completed his challenge of walking every street in Sheffield. Plotting his progress over 5 years on City Strides, Jim walked over 1,200 miles covering 6,388 streets. Congratulations Jim.

It's a pleasure to be able to chair this charity moving forward and thank you to all of my fellow trustees for their support in publicising the good work that our charity provides for families in the Sheffield region.

David Meadows, Chair of Trustees, March 2024

A thank you to John Hopkins

It was through his connection with the Freshgate Trust that John Hopkins first heard about the Sheffield Family Holiday Fund. John joined as a trustee around 30 years ago. Recently, John has stepped down as Chairman after 23 years in the hot seat taking the charity through its 30th and 40th anniversary celebrations. I'd like to take this opportunity on behalf of all the trustees to thank John for all the efforts he has made to ensure that SFHF has grown into the charity it is today.

John has personally raised well over £6,000 for the charity in recent years. He has taken part in a number of fundraising events including long distance bike rides all raising money for families. The proceeds from the book written about one of his bike rides has also provided much needed funds.

His eagle eyed passion for a good investment has now helped the SFHF to have investments valued at over £41,000 that will yield at least £3,000 per year moving forward. These funds guarantee that at least 5-6 families will benefit from a break every year.

Thank you for your service John and we all look forward to continuing working with you as a trustee.

Minutes of the 47th Annual General Meeting
Tuesday 14th March 2023, 12:30pm
Investec Offices, Beech House, 61 Napier St, Sheffield S11 8HA

In attendance: John Hopkins, June Blower, Nick Bolton, Jim Fulton, Rachel Hopkins, Mags Rivett, Dave Meadows, James Parker, Stephen Allen, Sara Gowan and Les Tomlinson

1. Apologies for absence.
 - Apologies were given for Liz Murray, Lady Anne Neill, Richard Kettleborough, Alison Gardner, Peter Jackson and Alex Ritchie
2. Minutes of the last AGM via Zoom
 - John Hopkins took the attendees through the minutes of the last meeting and all agreed they were accurate.
3. Annual Accounts and Annual Report, 2022
 - John Hopkins went through the annual accounts and annual report and they were agreed to be accurate
Proposer - Steven Allen and Seconder - Nick Bolton
4. Appointment of Independent Examiner.
Proposer - Rachel Hopkins and Seconder - James Parker
5. Election of Trustees.
 - John Hopkins, Stephen Allen and Jim Fulton retire by rotation and offer themselves for re-election.
Proposer - Nick Bolton and Seconder - June Blower
 - Nick Bolton confirmed that he will be stepping down as a trustee. John Hopkins thanked Nick for his many years of service to the charity.
6. Update from the Family Holiday Charity (FHC) by Mags Rivett, Director of Income and Engagement.
 - Mags Rivett provided an update of the work of the Family Holiday Charity in 2022. Holidays have returned to normal after the pandemic. However the cost of holidays is still higher than previous years. Families as standard are now issued food vouchers and travel vouchers to support them during their breaks. In 2022, the FHC supported 68 family holidays funded by the SFHF. This included 161 children and 121 adults. In total the FHC supported 1,854 individuals with a holiday or short break. 834 of which were from the Sheffield postcode region. Mags reported that the highest number of referrals comes from the Sheffield City Council. 49% of people awarded holidays in 2022 had never been on holiday before. Families are now given a voucher for them to choose their holiday from a partner travel provider. This enables families to feel they can choose a part of the country they would like to visit and to provide a choice of coastal and inland destinations.
 - Mags updated attendees on plans for 2023 including an additional grant of £325,000 from Visit England to be spent on holidays in 2023. Also, the FHC will continue to receive feedback from

referring organisations and families to help them improve their processes and to build a strong case for support of why holidays are still needed.

7. Any other business

- Sara Gowen provided an update from the Sheffield Young Carers (SYC) organisation. The second largest referring organisation for Sheffield holidays. The SYC are currently fundraising to try and provide additional counselling support for young people. NHS waiting lists are as long as 18 months. Sara updated that families hugely value a holiday and they can have a positive impact on families physical and mental health.
- John Hopkins reminded trustees that the charity's 50th anniversary is approaching in 2026 and to start thinking of ideas how the milestone year can be celebrated especially in the local media.
- John Hopkins thanked all the trustees for their support of the Sheffield Family Holiday Fund over the last year and encouraged trustees to share the brochure far and wide.

SHEFFIELD FAMILY HOLIDAY FUND
Financial Accounts

INCOME AND EXPENDITURE ACCOUNT- YEAR ENDED 31ST DEC 2023

| INCOME | 2023 | 2022 |
|---|---------------|---------------|
| | £ | £ |
| Donations from Charitable Trusts, Organisations and Individuals | 25,080 | 30,256 |
| Dividend Income | 2,585 | 2,449 |
| Bank Interest | 235 | 73 |
| Total Income | 27,900 | 32,778 |
| Less sundry expenses including Investec nominee fees | 1,058 | 1,683 |
| | | |
| NET INCOME FOR THE YEAR | 26,842 | 31,095 |

BALANCE SHEET AT 31ST DECEMBER 2023

| | 2023 | 2022 |
|--|---------------|---------------|
| | £ | £ |
| FIXED ASSETS | | |
| Quoted Investments at cost (Note 2) | 33,352 | 25,325 |
| Capital Fund cash balance (Note 3) | 467 | 5,321 |
| | 33,819 | 30,646 |
| CURRENT ASSETS | | |
| Cash at Bank and with fund manager | 12,757 | 18,695 |
| Debtors | 2,437 | 330 |
| | 15,194 | 19,025 |
| Less Creditors | 0 | 0 |
| Net Current Assets | 15,194 | 19,025 |
| | | |
| NET ASSETS | 49,013 | 49,671 |
| | | |
| Represented by: | | |
| ACCUMULATED FUND | | |
| Balance B/fwd | 49,671 | 48,076 |
| Add: Excess of Income over Expenditure | 26,842 | 31,095 |
| | 76,513 | 79,171 |
| Less: Transfer to Family Holiday Charity | 27,500 | 29,500 |
| | | |
| ACCUMULATED FUND at 31.12.2023 (2022) | 49,013 | 49,671 |

NOTE 1

HOLIDAY ARRANGEMENTS FOR 2024

The Sheffield Family Holiday Fund (SFHF) has agreed with the Family Holiday Charity (FHC) that the direct arrangements for holidays in 2024 for disadvantaged Sheffield families will be continued by the FHC. SFHF will continue to raise funds for the provision of holidays and has agreed to transfer money to FHC in advance to finance the holidays.

NOTE 2

The Quoted Investments had a market value of £41,280 at 31st December 2023 (£33,197 – 2022)

NOTE 3

Capital Fund

2023 Balance £467 (2022 - £5,321)

NOTE 4

SUMMARY OF FUNDS TRANSFERRED TO FAMILY HOLIDAY ASSOCIATION

| | 2023 | 2022 |
|---|---------------|---------------|
| | £ | £ |
| Funds held by FHC b/fwd | 15,096 | 34,181 |
| Payments made for holidays | 27,500 | 29,500 |
| | | |
| | 42,596 | 63,681 |
| | | |
| Cost of holidays and day trips in 2023 (2022) | 35,096 | 48,585 |
| | | |
| Funds held by FHC c/fwd to 2024 (2023) | 7,500 | 15,096 |

SHEFFIELD FAMILY HOLIDAY FUND

Independent Inspection

My inspection of the records and the preparation of the accounts is undertaken on a voluntary basis, and not intended to be treated by the committee or members as being an audit for the purposes of the Charities Act, nor as an independent examination by a reporting accountant as defined by the Charities Act.

My inspection is undertaken at the voluntary discretion of the Trustees with the sole purpose of assisting in the preparation of a fair statement of the Fund and subject to the foregoing, I am satisfied that the statements are in accordance with the records and explanations received, and further subject to those records, are free from material misstatement.

20 Feb 2024

R Gardiner
Accountant

TRUST & FOUNDATION DONORS

| | 2023 | 2022 |
|--|---------------|---------------|
| | £ | £ |
| Church Burgesses Trust | 3,000 | 3,000 |
| Freshgate Trust | 3,000 | 2,500 |
| JG Graves Charitable Trust | 3,000 | 3,000 |
| Charles and Elsie Sykes Trust | 2,000 | 0 |
| Queen Victoria and Johnson Mem Trust | 2,000 | 2,500 |
| Town Trustees of Sheffield | 2,000 | 2,000 |
| Zachery Merton & George Woofindin Conv Trust | 2,000 | 2,000 |
| Cutlers Company Charitable Trust | 1,200 | 1,000 |
| Sheffield Benevolent Society | 1,000 | 0 |
| James Neill Trust Fund | 1,000 | 1,000 |
| Dixon Pitchfork Charitable Trust | 750 | 750 |
| Hyman Winstone Foundation | 500 | 0 |
| Marcegaglia Stainless Steel Ltd | 400 | 0 |
| Harry Bottom Charitable Trust | 0 | 6,000 |
| | 21,850 | 23,750 |

OTHER DONORS

| | 2023 | 2022 |
|---|---------------|---------------|
| | £ | £ |
| Mr and Mrs Ferretti Open Garden Event | 680 | 689 |
| Gift Aid Reclaim | 534 | 0 |
| Anon | 500 | 400 |
| Abbeydale Rotary Club | 250 | 0 |
| AMC Staniforth | 250 | 0 |
| A Fretwell-Downing | 240 | 0 |
| D Meadows | 220 | 120 |
| J Hopkins | 200 | 0 |
| P Gannon | 200 | 0 |
| J Massey | 100 | 100 |
| Donations less than £100 | 56 | 179 |
| Christ Church Hackenthorpe | 0 | 300 |
| DD Pearson | 0 | 117 |
| John Lewis | 0 | 1,000 |
| Just Giving and Memory Giving donations | 0 | 1,519 |
| S Lee | 0 | 250 |
| S Lynch and R Purkiss | 0 | 1,025 |
| Soroptimist Int of Hallamshire | 0 | 500 |
| St John's Church Ranmoor | 0 | 307 |
| | 3,230 | 6,506 |
| | 25,080 | 30,256 |

Sheffield Family Holiday Fund Impact Report 2023

Our Purpose

To provide breaks for disadvantaged families in the Sheffield postcode region.

Update on activity - Holidays

In total **45 family holidays** have been funded by SFHF in 2023.

Those families comprise of **109 children and 85 Adults**

When families return from their holidays the Family Holiday Charity (FHC) gets in touch to find out about the difference they feel the break has made to them.

In 2023, families who had a holiday thanks to Sheffield Family Holiday Fund told us the holiday:

93% - had a **positive impact on the mental health and wellbeing of their family**

87% - had a **positive impact on the family's ability to deal with the challenges they face as a family**

87% - helped to **reduce feelings of stress and worry**

80% - had a **positive impact on the family's confidence**

and since they have come home, families told us that there has been a lasting impact:

73% - have spent **more time together as a family** since returning

27% - have become **more active in the community** since the holiday

Locations visited

| | | |
|------------------------------|--|------------------------------------|
| Bridlington Holiday Cottages | Golden Palm Resort, Skegness | Ocean Edge Holiday Park, Morecambe |
| Butlins, Skegness | Barmston Beach Holiday Park | Cockerham Sands, Lancaster |
| Clumber Park Lodges | Cayton Bay, Scarborough | Sunnydale, Saltfleet |
| Withernsea Sands | Coastfields Holiday Village, Ingoldmells | North Shore Holiday Park, Skegness |

Feedback from referring organisations

"To know that my client did not experience any mental health crisis on holiday is wonderful. To find peace in a beautiful place is lovely to hear. I feel this holiday has had a massive positive impact on my client and I thank you for enabling her to have this experience!"

"This break worked out perfectly for the family and they had a great time"

"Dad Stuart has stage 4 cancer and has begun end of life care, so every member of the family is significantly impacted by this in terms of their mental health. However, they had a wonderful time making precious memories, and during the holiday everyone's mental health felt improved and worries more manageable. Mum's confidence has increased and she knows that once Stuart dies she will be able to still do things with the children."

Feedback from families

“It really helped my son to leave his worries behind for a few days. He was like a different child.”

“It was perfect and just what we needed. The site was quiet and we were able to completely relax together and take our dog on lovely walks. after coming home we feel that life has turned a corner and we can finally move forwards.”

Update on activity - Group trips

With funds from the SFHF the following groups enjoyed a trip to the pantomime in December

84 people (38 adults and 46 children) from a community support partnership

45 people (17 adults and 28 children) from a primary school

58 people (18 adults and 40 children) from Sheffield Council Special Guardianship support service

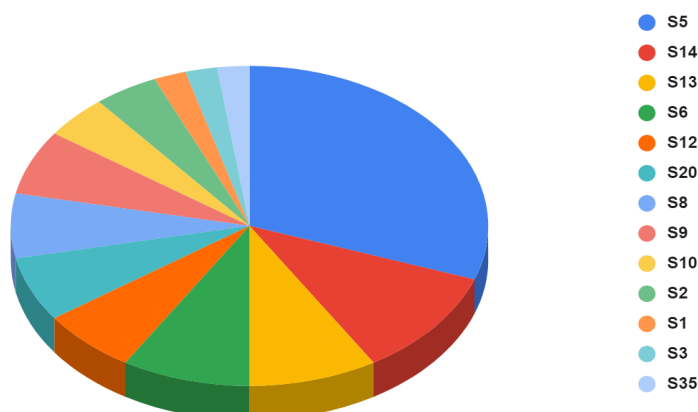
Feedback from the Primary School who attended the Pantomime

“Our families really enjoyed the trip. All of them had never experienced the Panto before and said that it would be something that they would never be able to fund themselves. With the funding we managed to buy snacks for adults and children, along with an ice cream. They were sincerely grateful, as we were, as a school, for the funding to enable us to buy the tickets. Most of our families had never been in a theatre before and enjoyed quality time with their children. One parent said they enjoyed the stress-free time with their children and support if needed from trusted school staff.”

Referring organisations in 2023

| | |
|--------------------------------|--|
| Sheffield Young Carers Project | Community projects |
| Homelessness Services | Various Sheffield Schools and Nurseries |
| Sheffield Housing Associations | Sheffield City Council |
| Domestic Abuse Services | Sheffield Council Special Guardianship support service |

Sheffield postcode regions supported



Emma's Story

"It was very posh!" laughs Emma. She's talking about an apartment at the UK's first ever holiday camp, Butlins in Skegness, where she's just come back from a short break with her partner Scott and daughter Evie-Rose.

They'd never been away as a family before and there's a reason why now it's more important than ever to Emma for them all to spend proper time together and create some amazing memories.

"I was diagnosed with breast cancer in March," she explains.

"Then I went for a body scan and they said I have lesions on my liver. When I went back for the results, they told me they can't cure it. They can control it but basically it messed my head up. It's not been easy; I just take every day as it comes."

The last few months have been full of hospital appointments and, because of a recent house move, money has been tight so the thought of a holiday simply wasn't an option. Until the family's support worker Nicola stepped in to nominate them for one with Family Holiday Charity funded by the Sheffield Family Holiday Fund.

According to Nicola: "Emma began grieving the years and experiences she will miss with her daughter, so I have worked intensely with her to help her make memories and facilitate experiences."

"Working through her list of things she would love to do while she can, Emma said she couldn't remember when she last had a holiday and said she had never been away with her partner and daughter as she had never been well enough."

With all the travel arranged for them, and a voucher to cover their food expenses while away, Emma was able to relax and really make the most of their stay.

"We went on the beach - it was a bit chilly but we built some sandcastles. We went to some shows, we went on rides. I just wanted to do as much as I can while I'm still here."

Emma has lived with mental health challenges for many years after being diagnosed with schizophrenia and then going on to develop agoraphobia. The two conditions have stopped her from experiencing many everyday events with her daughter. Simple pleasures like taking her to the park or going swimming.

With help from mental health support service Sheffield Foundations, Emma had gradually been gaining the confidence to start leaving the house and do things with Evie, now nearly seven. So when she found out about the cancer, she felt as if she'd been kicked in the teeth.

She managed to pick herself back up though and welcomed the prospect of getting away from everything for a few days. "I just wanted to put it all to the back of my mind and spend quality time with my partner and my daughter," she says.

For Evie and Scott, the five days were a precious opportunity to see Emma smiling and laughing. Moments that they will be able to recall and treasure in difficult days to come. Emma is the first to acknowledge what a difference the holiday made. "I'd really like someone else in my position to get offered that opportunity."

"It was just fantastic; we got a really good bond going. I didn't want to go back and face reality to be honest. But I try not to think about the future, I just take every day as it comes."



Emma's support worker was thrilled that the family had such a good time. "I have worked for many years in jobs very similar to what I am doing now," says Nicola, "but that moment, seeing their excitement and happiness while also knowing their sadness, was one of the most heart-warming and rewarding moments in my working life."

She continues: "Emma called me on their second day on holiday to thank me. She said they were having the best time ever and were on their way to the beach. I went to see her when she was back home, and she said she didn't realise how much she needed that holiday and that for five days there was no cancer or sadness."

"They will never forget the memories."

Emma and her family's holiday was funded by Sheffield Family Holiday Fund.

Information in this report has been provided by Kat Lee (Chief Executive) and Mags Rivett (Director, Income & Engagement), Family Holiday Charity (FHC).

Thank you to everyone who has supported the Sheffield Family Holiday Fund in 2023