



Young Carers Development Trust

2020 Vision

INSPIRE NURTURE ACHIEVE

Business Plan for 2018 to 2020

“Since the founding of the Charity in 2012, the Young Carers Development Trust has experienced 5 years of carefully controlled growth. We have set out our Vision and how we want to realise it, and we now have clear evidence of its success. Our plan sets out how we want to grow the Trust in the next 3 years to 2020 and what resources we need to do this.”

Charles Hignett, Chairman

November 6th 2017

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Executive summary

1. The Trustees believe the overall objective of improving the life chances of all Young Carers will be achieved by establishing and continually developing a network of high-achieving Young Carers, and by encouraging them to strive for ambitious goals and to advance in life. They will then become active and inspiring ambassadors for others from backgrounds similar to their own.
2. The Young Carers Development Trust (YCDT) was established in 2012 by a small group of Trustees, led by John Rogers. In 2016, John Rogers retired as Chairman and Trustee and Charles Hignett was appointed Chairman.
3. The Trustees' vision has been shaped by practical experience as senior executives in industrial, commercial and professional organisations and by the success of the Rank Foundation's School Leadership Award scheme, founded in 1978. The Trustees believe the strategy to assist Young Carers and to create a group of inspirational role models for all young carers is a unique proposition.
4. According to the Children's Society, there are an estimated 700,000 young carers in the UK who are the primary carer for a sick, incapacitated or addicted parent or sibling. 38% of young carers in school said that they would not go or could not afford to go to college or university because of their caring role. The difficulties they experience as a result of their caring role can have significant and long-term negative impacts on their engagement with education and employment and their overall physical and emotional wellbeing.
5. Beneficiaries are referred through professional carer organisations. The system is straightforward and designed to protect potential beneficiaries from facing unnecessary disappointment. These organisations understand the process and our objectives which means that the Trust is introduced to the brightest but most needy individuals. All of our current young carers come from areas with high levels of social deprivation.
6. Assisted by executives from local Young Carer organizations in Bath, North East Somerset and Wiltshire, in its first 5 years the Trustees have awarded grants to 11 Young Carers. Each Beneficiary has been matched with a Development Manager and together they have agreed targets for the year.
7. Self-employed Development Managers who have experience of working with young people, relevant life experience, empathy and the necessary time to spend with Beneficiaries have been recruited and are matched with Beneficiaries to help them maximise their career potential.
8. The relationship between a Development Manager and a Young Carer has been one of the tangible successes of the Trust. A Development Manager mentors and encourages a Young Carer and provides stability and reassurance to them over a 4 year period. The feedback from the Young Carers has been confirmation of the value that they have put on this relationship.

9. After five years, there is clear evidence of success among the Trust's Beneficiaries in terms of exam results, success in higher education, presentations and workshops and their own visible personal development. This supports the Trustees' view that with extra funding YCDT can grow more rapidly and engage with a wider group of Young Carers, families and related organisations.
10. The Trust's financial strategy is governed by a firm commitment to ensure there are sufficient actual and committed funds available to support Beneficiaries through the development programme, which may last for four or five years including a year of post programme support. The Trust holds cash reserves sufficient for this purpose. The Trust's investment policy is cautious and risk averse.
11. In 2016 the Trustees approved and implemented the following expansion strategy:
 - Accelerating the development and geographical reach of the Trust in the South West, identifying new funding sources and partners from charitable and commercial organisations who have contributed and enabled the Trust to grow.
 - The employment of a committed Charity Manager to develop a scalable organisation with robust policies and procedures, establish a sustainable funding model for the Trust while simultaneously improving governance and management.
 - Working with local carers services and educational establishments to extend awareness of YCDT and to give an understanding of its philosophies and objectives. This enables them to identify inspirational individuals who match our criteria.
 - Recruiting training and supporting a pool of Development Managers (DMs) who have the necessary life experience, empathy and time to devote to carers and families. They are the principal resource for mentoring, encouraging and developing Young Carers.
 - Inviting our Beneficiaries to become Ambassadors who can share their experiences with other Young Carers. Setting up workshops, presentations, meetings with donors and carer organisations to build awareness and allow our Beneficiaries to share their experiences
 - Rebuilding the web site and creating a presence on social networks and other IT platforms
12. With a permanent management team, the raised profile of the charity and the increasing number of Young Carers completing the development programme, the Trust's ability to raise additional funds has been extended. The fund raising results of 2017 are an example of the increased sustainability of the Trust. All Trustees are involved. For the 2020 outlook our expansion will remain localized to the south west, and we will continually review the position in the light of outcomes and fundraising during the plan period.

Organisation Details

2.1: Charity/Company Name:	Young Carers Development Trust
2.2: Address:	c/o The Carers Centre Woodlands, Lower Bristol Rd, Bath BA2 9ES
2.3: E-Mail:	info@ycdt.org.uk
2.4: Website:	www.ycdt.org.uk
2.5: Legal status:	Company Reg.No:07771110 Charity Reg.No: 1150197 The Company is limited by guarantee. In the event of a winding up, the liability of each member is limited to £1.
2.6: Independent Examiner	Burton Sweet, Chartered Accountants

The Role of the YCDT

3.1: The Vision

The primary aim of the Trust is to assist and improve the life chances of all Young Carers who are providing a significant level of care for a disabled or seriously ill family member.

3.2: Mission Statement

The Trust's principal objectives will be achieved by establishing and developing a network of highly focused Young Carers, by encouraging them to strive for ambitious goals, to advance in life and to become active, inspiring models for others from backgrounds similar to their own.

3.3: Values

YCDT's values reflect the organization's objectives and the methods used in working with Young Carers, their families, respective partners and support services. The presence and importance of these values constitute one of the elements that highlights the difference between YCDT and the service provided by the public care sector.

- Trustees aim to inspire and encourage young carers so that they grow in confidence and ambition and work hard with good humour and appreciation to improve possibilities and outcomes in the short term. Later this relationship enables them to become ambassadors for the trust and to inspire others to achieve higher goals.
- Trustees recognise the importance of strong, creative partnerships with organisations and individuals willing to support us to achieve our objectives and who are able to offer additional opportunities for Young Carers.
- Trustees and employees will be innovative, bold and responsive to achieve our objectives.
- Trustees will be responsible stewards of the resources made available to us. We will be transparent, accountable and efficient in the use of funds and the deployment of human resources.

3.4: Strategy

The Trustees' objective is to support and encourage Young Carers (Beneficiaries) who are providing a 'significant level of care' for a disabled or seriously ill family member. This will address the imbalance and lack of diversity of opportunity and the negative impact on education and employment which is frequently experienced by Young Carers due to their difficult role and caring duties, whilst at the same time encouraging them to strive for ambitious goals and advancement in life.

This strategy will be achieved by:

- Working with local carer communities and centres to promote awareness and a clear understanding of the Trust's philosophies and objectives. This will assist carer executives to identify young inspirational individuals who are most likely to meet our criteria.

- Recruiting, training and supporting Development Managers who have the necessary life experience, empathy and time to devote to carers and families. Development Managers are the principal resource for mentoring, encouraging and developing Young Carers.
- Engaging with Young Carers and providing financial, educational guidance and mentoring during their formative years. This form of assistance will develop Beneficiaries' skills, capacities and capabilities enabling Beneficiaries to participate in society as mature and responsible individuals and to inspire carers in similar situations.
- Encouraging our Young Carers, as they progress through their higher education choices, to become Ambassadors for the trust engaging in workshops and presentations with Carers Centres, other communities and education centres. Our Ambassadors are trained to use their own personal experiences to motivate other Young Carers with similar life backgrounds to aspire to more.
- Creating a scalable organisation founded on robust policies and procedures, while simultaneously developing and improving the Trust's governance and leadership structure. Our activities will be underpinned by sound financial management.
- Embedding YCDT values and culture throughout the Trust.
- Creating an adequately resourced and sustainable fundraising and communications strategy which builds upon the approach of our existing funders.

3.5: **Public Benefit Statement**

In setting YCDT's objectives and planning its activities, we have given careful consideration to the Charity Commission's public benefit guidance. In particular, we have considered how our planned activities will contribute to our vision and mission. All our charitable activities focus on supporting and encouraging Young Carers who are providing a 'significant level of care' for a disabled or seriously ill family member and they are undertaken to further our charitable purposes for the public benefit.

3.6: **Similar Charities**

The Trustees believe their strategy to support and encourage Young Carers is unique and are unaware of any other organisation using the same approach.

Organisation, Structure and Governance

4.1: Background

The Young Carers Development Trust was established in 2012 by a small group of Trustees, working under the leadership of John Rogers. In 2016, John Rogers retired as Chairman and Trustee and Charles Hignett was appointed Chairman. The Trustees' vision has been shaped by their practical experience as senior executives in industrial, commercial and professional organisations and also by the success of the Rank Foundation's School Leadership Award scheme, founded in 1978.

4.2: Young Carers and the Selection Process

Assisted by executives from local young carer organisations in Bath, North East Somerset and Wiltshire, a number of young Beneficiaries have been identified each year, who clearly demonstrate the following characteristics:-

- Tenacity of spirit
- Academic and practical ability
- Ambition
- Resourcefulness
- Strong work ethic
- Sense of humour

The Beneficiaries with whom we are working have significant potential, well developed personal skills and levels of maturity beyond their years. Once encouraged to challenge themselves, they grasp every opportunity to do so and make the most of it.

Our referral system from professional carer organisations is straightforward and is designed to protect potential beneficiaries from facing unnecessary disappointment.

The Carer Services understand the process and what we are aiming to achieve. This means that we are introduced to the brightest but most needy individuals. All of our current young carers come from areas with high levels of deprivation

4.3: Ambassadors

As part of its support the Trust offers training and skills courses for Young Carers and over this period the concept of helping other Young Carers from similar backgrounds is introduced. The 3 Beneficiaries who have now passed into higher education and employment, having originally fallen behind in their studies when they were first introduced to the trust, have now achieved higher exam or career progression than predicted. Each have agreed to become Ambassadors. As an example Dan tells his story in a video on the Trust's website.

An Ambassador will play a key role in helping the Young Carers Development Trust meet its strategic objectives which will be achieved by establishing and developing a network of highly focused Young Carers who will continue to work with us to become active, inspiring models for others from backgrounds similar to their own. Opportunities for the Ambassadors to give encouragement and support to other young carers are actively encouraged in partnership with young carers services in the region.

4.4: Trustees and Directors of the Company :

Charles Hignett (Appointed Chairman 12th Dec 2016)
John Rogers (Resigned 6th Dec 2016)
Jenny Bower (Appointed 26 Sep 2016)
Victoria Clare
William Feeny (Treasurer)
Linda Packard
Timothy Young

The Trustees receive no remuneration or payments for acting as Trustees. More details of the Trustees are set out in Appendix 1.

The Trustees' vision is influenced by:-

- Practical experience as senior executives in Industrial, Commercial and Professional business.
- The success of the Rank Foundation's School Leadership Award scheme founded in 1978.

Training and development of the Trustees is continuous. The Trustees are required to complete the Child Protection online training and assessment program once every 2 years.

4.5: Charity Manager

Ali Groves was appointed Charity Manager in Aug 2017. Her responsibilities are :

- Building and maintaining relationships with Young Carer Organisations to ensure that qualifying young carers are identified and put forward for support.
- Creating a sustainable fund-raising model for the Trust
- Assisting Trustees to identify and appoint Development Managers (DMs) and managing the DMs induction budget and reporting process.
- Assist Trustees to pair DMs with Beneficiaries.
- Review DMs' quarterly reports and submit to Trustees with relevant comments.
- Ensure ongoing support and training is given to DMs
- General administration of the Trust

4.6 Development Managers (DMs)

Self employed Development Managers who have experience of working with young people, relevant life experience, empathy and the necessary time to spend with Beneficiaries have been recruited. Each is tasked with helping Beneficiaries to maximise their career potential.

DM's come from all spheres of life and professions and therefore some need reimbursement for expenses and other costs. They are paid an honorarium although in some cases they choose not to take this payment. Each is directly responsible for a maximum of three Beneficiaries.

Their role is to :

- Provide one to one mentoring either in person, by phone or social media approximately once a month but varying according to the needs or academic timetable of the Young Carer
- Assist Beneficiaries to identify and set academic and career objectives.
- Contact with school representatives or family as authorised and appropriate
- Identify, organise and supervise targeted tutorial support.
- Develop, co-ordinate and monitor relevant mentoring services.
- Prepare quarterly progress reports for submission to the Charity Manager

The individual support provided to Beneficiaries is not necessarily restricted to improving academic grades, but will inevitably help to raise levels of aspiration.

The influence and importance of our DM's working with Young Carers over a period of 3 to 4 years cannot be overstated. By very virtue of their caring roles, these young people are often more capable and demonstrate a higher degree of emotional intelligence than their peers but are often overlooked and fail to thrive in their school environment. They also help and identify other support that is available to the Young Carer so that they can pursue their ambitions without impacting their family situation. Over a period of 3 to 4 years the Development Manager becomes a strong and constant mentor and support for them.

4.7: Inspiration to other Young Carers and to 3rd Parties

The Vision of the Trust is to assist all Young Carers. According to the Children's Society, there are an estimated 700,000 young carers in the UK who are the primary carer for a sick, incapacitated or addicted parent or sibling. 14% of young carers in school said that they would not go to college or university because of their caring role. 24% have said that they cannot afford further education. The difficulties they experience as a result of their caring role can have significant and long-term negative impacts on their engagement with education and employment and their overall physical and emotional wellbeing.

As our Beneficiaries reach the end of the support period with the Trust, we ask them to continue to promote new opportunities and demonstrate to others who share similar backgrounds how it is possible to achieve more and aspire to greater things whilst still undertaking their caring responsibilities and duties.

Funded by the Big Lottery Fund, the Trust is providing 6 workshops, hosted by a number of regional carers services and offering study and life skills support to a greater number of young carers. In addition, ongoing training is offered to our Beneficiaries on presentation skills and story telling in order to equip them with the skills needed to fulfil their Ambassadorial roles. The Charity Manager is actively seeking wide ranging opportunities for the beneficiaries to "tell their story" to a much wider audience.

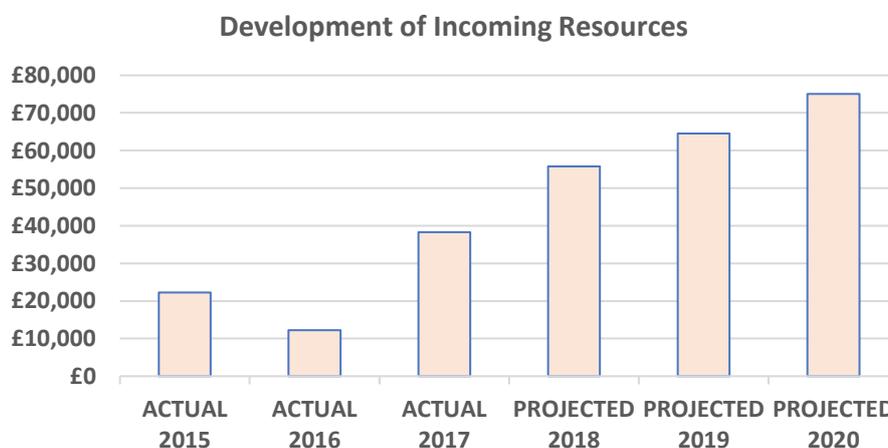
Financial strategy

5.1: The Trust's development strategy and financial reserves policy is governed by the following principles:-

- A firm commitment by Trustees to ensure there are sufficient actual and committed funds available to support Beneficiaries through the development programme, which may last for four or five years and include a year of post programme support.
- Trustees seek to produce the best financial return within an acceptable level of risk. As the majority of assets are expected to be distributed to beneficiaries within four years, capital preservation is of paramount importance.
- The establishment of a robust monitoring and evaluation programme, so that signs of system failure are promptly identified and corrected.
- The maintenance of additional reserves sufficient to pay for the overhead of the Trust for 12 months.
- The publication of a three/four year budget for each award holder, to be approved and periodically reviewed by the Trustees.

5.2: To date the Trust has been funded by grants from other Trusts and donations. Over the longer term Trustees look to find new sources of sustainable funding as well as identifying partners from charitable and/or commercial institutions/individuals keen to contribute to the growth of The Trust.

The Charity Manager applies a proportion of time to fundraising and in 2017 has increased the income of the Trust from £12,000 to just under £40,000. Expectations in 2018 are that funding will increase to £55,000 and in 2019 to over £60,000.



5.3 The Trusts' cost per Beneficiary is established as (approximately) £1,750 over each of the last 3 school years and £500 for the first year of higher education. £500 per year is offered to Development Managers as an honorarium.

Support can vary according to an individual's needs, but overall more than 50% of all grants are provided in the form of education and tutoring fees. Support continues through the first year at University/College/training/employment, but at a diminished level. Thus £5,750 over four years enables one young carer to enjoy opportunities otherwise denied.

Background & Achievements to Date

6.1: In the last 5 years the Trustees awarded grants to 11 Beneficiaries from Bath, North East Somerset and Wiltshire. Each has been paired with a Development Manager and together they have agreed annual targets. Already, there is clear evidence of success amongst early Beneficiaries

The names below have been changed:

- Amy - Over the years, from the age of 5, she has provided a significant caring role for both parents. Originally predicted C's at GCSE, the Trust supported her to improve these grades and to gain three good A levels and as a consequence, a place at her first choice of university. She has now completed her Psychology degree and is working within the Health Service, which was her ambition since a young child. Amy is one of the Trust's first Ambassadors.
- Susan gained excellent grades at A' Level, whilst still caring for her disabled sibling, and has now embarked on her chosen degree of Physiotherapy at University
- Fiona was particularly struggling to pass her maths GCSE. With extra tuition and support provided by the Trust she achieved the grades necessary to attend her chosen university.
- Annie is on course to get straight A's in her A' Levels and has applied to Oxford University to read Politics and History

Currently, the Trust has completed the training and matching of 6 Development Managers. A support structure has been set up, including procedures for regular reporting, attendance at Trustee meetings, together with problem identification and resolution. Financial controls have been established for the payment of expenses for Beneficiaries and Development Managers.

6.3: In 2015, 2016 and 2017, the Trust held general meetings for Beneficiaries, Development Managers, Funders and Trustees. The aims of these events called "Inspire" were to:

- enable Beneficiaries to encourage other Young Carers to aspire and achieve.
- enable Beneficiaries, Development Managers and Trustees to strengthen relationships, peer support and a greater understanding of how the Trust is meeting its objectives.
- enable Beneficiaries to encourage, inspire and motivate each other, the Development Managers and the Trustees.
- allow donors to the Trust to meet and talk to Young Carers and to hear their stories
- create content for the website through video, photos and written stories.

Inspire was funded by a grant from the Big Lottery fund and based on post event feed-back from Beneficiaries and Development Managers has achieved its objectives. The event will be repeated annually. Over 30 people attended these events including representatives from local businesses, carer organisations and the Councils

6.4: Our commitment to our beneficiaries is long term and we hope will be a continuing relationship. The beneficiaries have positively welcomed being asked to be Ambassadors and all 3 have appeared or presented at different events.

- In 2017 David presented to over 400 pupils at a local Independent School explaining the role of a Young Carer and the difficulties and challenges faced as a result of their caring duties. On a show of hands only less than 10 pupils at the morning assembly understood what a Young Carer was and what their responsibilities were

- In Spring 2018, all 3 current Ambassadors have agreed to present and give advice and encouragement to a large number of much younger carers than themselves in order to inspire them to pursue their studies and education, training and career goals.

6.5: The Charity Manager has overseen the restructuring of our web site, payment portal and other social media outlets.

The Trust's website (www.ycdt.org.uk) went live in December and included photos and videos from the Inspire day. Its appearance and especially the video stories of our Young Carers has stimulated a wide range of interest. Web statistics show over a 1,000 visits with 50% as new visitors.

A YCDT Facebook page has been created, containing information and stories for all beneficiaries and supporters

Goals

7.1 The Next 3 Years - 2018/2019/2020

The Trustees are now actively looking to continue to expand the activity and geographical reach of the Trust in the South West and to find new funding and partners from charitable and commercial institutions and individuals to allow the Trust to continue to grow. The Trustees have agreed that in the current year the Trust will continue to grow organically whilst maintaining strict control over overhead. If necessary the Trust will recruit executive staff until they are confident that a structured robust scalable organization has been achieved, but only on the basis that there are sufficient committed funds.

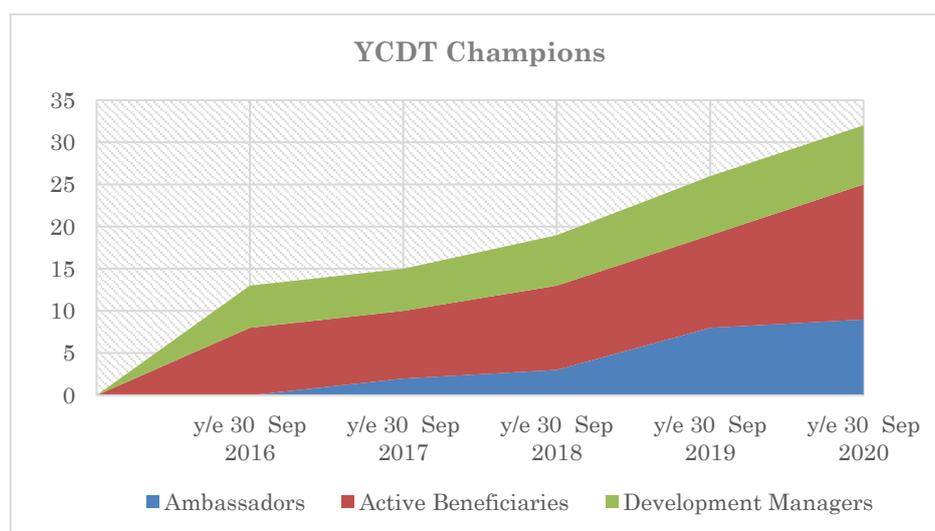
The immediate steps are:

- Continuing discussions to find potential strategic and corporate partners to enable the Trust to secure longer term financial security and to focus resources on its principal objectives .
- The development and further training of our Charity Manager supported by a small group of Trustees who meet on a monthly basis to assist the Charity Manager 's workload, and maintain and expand funding opportunities
- Development Managers will continue to be identified and recruited through personal networks to create a cadre to be matched with new Beneficiaries. This will improve the matching process, avoid delays for new Beneficiaries and enable scalability.
- Fundraising will be planned and managed by the Charity Manager but the Trustees will continue to play a role in fund raising activities. The targets set out in the attached financials will be carefully measured and plans will be adapted as appropriate
- The Inspire program will be continued but restructured as an annual event to allow the guests to be expanded to include connected parties and donors and other Young Carers.
- Contact will continue to be improved with other carer services neighbouring with Bath, North East Somerset and Wiltshire to find and reach out to the most deserving Beneficiaries. These to include but not limited to Swindon, Gloucester and South Gloucestershire

7.2: Impact analysis of Beneficiaries and Ambassadors

Based on the assumptions set out in Appendix 3, the Trustees believe that they will be able to identify and engage with increased numbers of Young Carers and assist them to support and motivate other individuals who are in a similar position to themselves. The chart below shows the number of Young Carers engaged on the 4 year development scheme in each year together with the estimated Ambassadors and Development Managers who will continue to work with the Trust.

By 2020 over 30 Young Carers and Mentors will be directly engaged with the YCDT development scheme and become Champions of the Trust. The number of indirect impressions or champions is significantly higher.



IMPACT ANALYSIS OF YCDT SUPPORTERS AND CHAMPIONS

	y/e 30 Sep 2016	y/e 30 Sep 2017	y/e 30 Sep 2018	y/e 30 Sep 2019	y/e 30 Sep 2020
Ambassadors	-	2	3	8	9
Active Beneficiaries	8	8	10	11	16
Development Managers	5	5	6	7	7
Supporters (individual)	25	35	45	55	65
Trusts giving funding/applications	17	35	35	35	35
Young Carer Organisations	10	10	15	20	25
Workshop (x 6) attendees		120	120	120	120
Inspire Day	30	30	30	30	30
Aviva Community award votes	1,128	n/a			
Fundraising event			80	80	80
Web site visits/impressions		150	200	250	300
School assemblies		450	450	450	450
Total No of Impressions	1,223	845	994	1,066	1,137
Cumulative impressions	1,223	2,068	3,062	4,128	5,265

Financials

- 8.1: Full detail of funding and financial projections are set out in Appendix 3. With the appointment of the Charity Manager the Trust is now moving towards a more sustainable income model as set out in Section 5.2

The expansion will be funded by equivalent and new funding sourced by the Trustees and the Charity Manager. The Trust will also seek to find local business organisations who will support the Trust generally or who may wish to support individual beneficiaries

- 8.2: With the expansion of the funding strategy, the importance of managing restricted and unrestricted funds has been recognised and a restricted funds protocol is established. The summary report managing the split between restricted and unrestricted reserves is attached in Appendix 3.

Risk Management

- 9.1: The Trustees have conducted a review of the major risks to which the charity is exposed. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces. Details of these policies and procedures in place are set out in Appendix 2. Trustees have also identified risks which may impact on the proposed strategy and are taking steps to mitigate them. The most significant are:-

- 9.2: A Failure to meet fundraising targets.

Trustees recognise that the successful fundraising in 2017 may not necessarily be repeated in subsequent years. Strict management reporting is in place to monitor the progress of fundraising during the year so that budgets can be adjusted as appropriate

- 9.3 Beneficiaries not wishing to become Ambassadors

To date the 3 beneficiaries who have completed their period of support have agreed to be ambassadors and have been active supporters of the Trust. The Trustees believe that the relationship with the Development Manager and with other Young Carers within the trust is a key element of this success. As more Young Carers pass through the Trust the success of the Ambassador scheme will be a key indicator of how the process is working.

- 9.4: A failure in the safeguarding of young adults

Procedures are in place to ensure compliance with the safeguarding of vulnerable adults, lone worker and home visits, and risk management. All Trustees, Development Managers and other related individuals undergo training at a minimum of every 2 years. The procedures are periodically reviewed to ensure that they continue to meet the needs of the charity. Details are attached in Appendix 2.

Outcomes

- 10.1: Outcomes provide greater transparency and accountability for the Trust, and demonstrate achievements and strengthen the case for funding. Due to the long-term nature of the relationship that YCDT has with its beneficiaries, direct outcomes which measure the success of that relationship, and the realisation of our mission statement will not become clear until after our support ends.
- 10.2: Indirect outcomes demonstrating the success of individual carers include:
- exceeding the original academic expectations set out in the application to the trust measured through Tutor reports and exam results
 - the extent to which individual carers are involved in the activities of the Trust
 - the personal development and confidence shown by individual carers
 - the number of Young Carers who agree to become Ambassadors and are willing to inspire other young carers.
- 10.3: Other indirect outcomes relate to the impact of the Development Managers.
- The successful recruitment induction training and retention of Development Managers who are our principal resource and our direct link to our Young Carers, is a key element of the success of the Trust.
 - The successful matching with a beneficiary is a key element of the success of the program. The commitment of our Development Managers is for 4 years, and to date only 1 has left the process in the final year of the program.

Fundraising Strategy

- 11.1: The appointment of the Charity Manager together with the raised profile of the charity and the numbers of Young Carers who will have completed our development program will extend the ability of the Trust to raise additional funds and by 2021 will be close to matching our strategic partners contribution.

All Trustees will be involved in fundraising which is seen as a shared responsibility. Individuals and Organisations who support our fundraising and/or make large donations will need to be managed by specific Trustees with a fundraising target in mind.

The charity manager will be trained and tasked to make grant applications. A reporting structure and format has been established. The Charity Manager will be financially incentivised to make applications.

Appendix 1 – Trustees and Management



John Rogers – Retired as Chairman & Trustee 6th Dec 2016

Our thanks go to John Rogers who established the Trust in 2012 and under whose leadership YCDT has developed over the last 5 years.



Charles Hignett - Chairman

Charles Hignett has spent much of his life working in and around the Bath area. He is a self employed businessman with a wide diversity of interests, and in addition has served as a Trustee for a number of local charities. Charles is particularly interested in the charitable provision of support structures to provide new opportunities for the disadvantaged young and old who have the will to become, or wish to remain, self-reliant.



Linda Packard

Linda is a solicitor (non-practising), Sloan Fellow of The London Business School and business owner. She is involved in the local community as both a Wiltshire councillor and a Chippenham Town Councillor and is chair of the Chippenham Area Board. Linda has worked on a voluntary basis with both Young Carers and people with learning disabilities.



Victoria Clare

Victoria is currently CEO of Project Harar – a medical NGO providing services to children in Ethiopia. She has 20 years' experience of working with disengaged or disadvantaged young people, mainly within the not for profit sector in the UK. In 2002 she established the Wiltshire Young Carers Service. She had previously worked as a Senior Manager in a variety of youth work charities.



William Feeny

William is a Senior Financial Professional with extensive international experience in line and corporate functions in major media Corporations. He has direct experience in media and intellectual property, legal services, mergers and acquisitions and in start up businesses.



Tim Young

Tim worked as a teacher between 1975 and 2007, in the UK, California and New Zealand; this included serving as housemaster at Eton College [1988-92] and as headmaster of the Royal Grammar School, Guildford [1992-2007]. Since 2007, he has been Director of Education for the Rank Foundation.



Jenny Bower

Jenny Bower started her business career in the Bath Careers Service for County of Avon and progressed to Marketing Manager at London Life Insurance. She then went on to create one of Bath's largest and most respected property businesses. She is currently Managing Director of Bath Estate Management. She has many years of charity fund raising work and most importantly her own experience as a young carer.

Charity Manager



Ali Groves

Ali is the Trust's first Charity Manager and comes to the role with previous experience in arts management and professional training. With a background working with charities, she is able to use her experience and expertise to strengthen and grow the Trust's work and reach. She is a mum to three children, one of whom is autistic. She therefore understands first hand the issues facing any caring siblings and is delighted to be working for an organisation that seeks to support young carers.

Appendix 2 - Policies and Procedures

App 2.1: Policies and Procedures

The table below lists the current policies in place.

Policy	Compliance	Date of last review	Comment
Conflict of Interest	N		
Safeguarding vulnerable adults	Y	Dec 2016	
Lone worker & home visits	Y	Dec 2016	
Risk Management	Y	Dec2016	
Financial Administration	Y	Mar 2017	
Health and Safety	N		Less than 5 employees
Complaints	Y	Oct 2017	
Disciplinary policy	Y	Oct 2017	
Equal Opportunity	Y	Oct 2017	
Reserves policy	Y	Mar 2017	
Data protection & GDPR	Y		
Investment policy	Y	May 2016	

Copies of the above Policies & Procedures are available on request

YOUNG CARERS DEVELOPMENT TRUST ...
Reserves forecast for period 1st Oct 2017 to 30 Sep 2020

5

EXPECTED RECEIPTS	Full Year 30/09/2018			Full Year 30/09/2019			Full Year 30/09/2020			
	Voluntary income	Full Year	Unrestricted	Restricted	Full Year	Unrestricted	Restricted	Full Year	Unrestricted	Restricted
Denman		6,250		6,250						
Gilchrist										
Peoples Post Code					7,500		7,500			
Rathbones										
Funder 3		7,000	7,000		7,000	7,000		10,000	10,000	
Funder Trusts various Unidentified		3,000	3,000		5,000	5,000		5,000	5,000	
Funder 5 Unidentified		3,000	3,000		3,000	3,000				
Funder 6 Unidentified		8,000	4,000	4,000	8,000	4,000	4,000			
Funder 7 Unidentified		5,000		5,000	5,000		5,000			
Funder 8		5,000	5,000		7,500	7,500		10,000	10,000	
Funder 9		7,500	7,500		10,000	10,000		45,000	25,000	20,000
Funder 10		7,500	7,500		7,500	7,500				
Corporate donations										
Individual donations		3,500	3,500		4,000	4,000		5,000	5,000	
Gift Aid reclaims										
Legacies										
Activities for generating funds										
Investment income										
Bank interest		20	20		20	20		20	20	
Receipts from charitable activities										
Other ancillary trading activities										
Other incoming resources										
Sundry Income										
Total Expected Receipts		55,770	40,520	15,250	64,520	48,020	16,500	75,020	55,020	20,000
check digit		0			0			0		
PROJECTED OUTGOINGS										
Charitable Activities										
Grants to individuals Unrestricted		11,500	11,500		17,250	17,250		17,250	17,250	
Grants to individuals Restricted		11,500		11,500	11,500		11,500	17,250		17,250
Costs against restricted income		0	-5,000	5,000	0	-5,000	5,000	0	-5,000	5,000
Inspire day costs		0			0			0		
		0			0			0		
Support Costs		0			0			0		
Travel		500	500		750	750		500	500	
Oversight		0	0		0	0		0	0	
DBS checks and training		250	250		250	250		250	250	
Insurance		300	300		350	350		350	350	
Web site & IT costs		750	750		750	750		750	750	
Postage stationery and promotional m		1,500	1,500		1,500	1,500		1,500	1,500	
Sundry		1,000	1,000		1,000	1,000		1,000	1,000	
Staff Costs		0	0		0	0		0	0	
Salaries Charity Manager FT E		20,000	20,000		22,000	22,000		25,000	25,000	
Salaries Administrator FTE		0	0		5,000	5,000		10,000	10,000	
NI & Related costs		3,000	3,000		5,400	5,400		7,000	7,000	
		0	0		0	0		0	0	
Governance Costs		0	0		0	0		0	0	
Meeting costs		150	150		150	150		150	150	
Bank charges		100	100		100	100		100	100	
Independent Examiner		840	840		840	840		840	840	
			0			0			0	
			0			0			0	
Total		51,390	34,890	16,500	66,840	50,340	16,500	81,940	59,690	22,250
check digit		0			0			0		
Increase/(reduction) in reserves		4,380	5,630	-1,250	-2,320	-2,320	0	-6,920	-4,670	-2,250
check digit		0			0			0		
Opening Balance of reserves		25,043	10,254	14,789	29,423	15,884	13,539	27,103	13,564	13,539
Closing balance reserves		29,423	15,884	13,539	27,103	13,564	13,539	20,183	8,894	11,289