



Annual Report 2024-2025

Our vision is a world that is inclusive to all, regardless of ability.



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This year has been one of **change and renewed purpose** for White Lodge. In 2024, we ran a strategic review. Staff, volunteers, families, and partners shared their views. Their input helped shape a clear vision and a bold five-year Active Plan to guide our future.

We welcomed two new Trustees and said goodbye to two long-serving A. We also made changes in our Senior Management Team.

A major achievement was **securing funding for capital improvements**. These include a new sensory room, a revitalised garden, and new flooring in key areas to improve safety and accessibility.

Being rated '**Good**' by Ofsted reflects the care, quality, and consistency our teams deliver every day. We continue to meet and exceed our contractual obligations.

Internally, we have **modernised operations**. We refined policies, simplified workflows, and laid the groundwork for better quality and impact across all departments.

Our communications with the community have been enhanced. Effective marketing, social media, and outreach enable us to share our impact and connect with families, funders, and supporters.

These achievements are possible thanks to the dedication of our staff, volunteers, supporters, and Trustees.

Over the past year, **we helped more than 1,300 children, adults, and families**. Their stories remind us why our work matters and inspire us to move forward with confidence.



Neil McIntyre - Chair of Trustees

White Lodge has **continued to grow and improve**. We've made progress, despite the environment being tough. Financial pressures, changes in local government, and other challenges have made things harder - especially for small charities like ours.

We've **relied more than ever on fundraising** to support our extra activities. Thankfully, many supporters have stepped up, giving their time and energy to help us reach our goals. Their efforts have made a real difference.

Our staff have once again shown great care and dedication. They've supported many customers and families with empathy and skill. The Board is proud of the positive feedback we've received from both customers and commissioners. Our team's commitment help make White Lodge a special place.

We've launched a new **five-year strategy**. It gives us a clear focus and helps guide our work. Our yearly plans break down our goals and show who is responsible for what. This helps us to stay organised and work together more effectively.

We also welcomed two new trustees this year. Kristy Wall is our new treasurer, and Lisa Wall brings deep experience from the health sector. Both add valuable skills to our team.

As our customers' needs change, we aim to meet them with care and purpose. We're grateful to everyone who supports us in so many ways. The Board is confident and hopeful about what White Lodge will achieve in the coming year.



The **landscape for charities has been both tough and full of change** since 2020, and like many charities, we've felt the impact of new government policies. Increases to National Insurance and the Minimum Wage are good for workers, but they've added pressure to our budget and made it harder to grow our services.

We've also faced **rising costs** for food, energy, and other essentials. These challenges have **affected** how we **deliver services** and our overall performance.

We spent time talking with staff, volunteers, customers, and partners to shape our new five-year strategy. Over 200 people shared their ideas. We launched the strategy in April 2025, along with new goals and a yearly plan.

A key part of our strategy is listening to our customers. Their stories help us improve what we offer. We also welcomed a new Communications and Marketing Manager to our senior team. This role enables us to **raise awareness, share stories, and push for change**.

Good progress has been made with central office projects. We've focused on **streamlining our operations** and updating our policies and procedures to enhance quality and performance across the organisation.

We also finished three big projects in Pathways: a new garden, a sensory room, and new flooring. These upgrades make our spaces **more welcoming and accessible**. The Surrey Short Breaks contract remains in high demand. Even with a smaller budget, we're finding new ways to support families with SEND.

Our fundraising team had a great year. We're thankful for every gift and every volunteer. Our team continues to show care, respect, and dedication.



White Lodge was founded in 1962 with a clear focus: supporting individuals with Cerebral Palsy

Over the decades, **our mission has grown**, just as the needs of our community have evolved. Today, we proudly **support children and adults** living with a wide range of conditions - from rare genetic syndromes to acquired neurological challenges. Most of our customers present with a primary diagnosis; however, many also have additional conditions that are linked to or associated with this diagnosis.

Our expertise now spans conditions such as Global Developmental Delay, Learning Disabilities, Motor Neurone Disease, Spinal Muscular Atrophy, Stroke, and Turner Syndrome.

Each diagnosis brings unique needs. We continue to adapt and expand our services to meet our customers' needs with compassion, skill, and innovation.



It costs over £3 million to run White Lodge every year



We've delivered inclusive play and youth schemes for 24 years

Working together to champion inclusion

Enriching the lives of children and adults in our community.

White Lodge has been dedicated to enabling children and adults with disabilities to thrive for 63 years.

Our new five-year strategy sets out a clear vision: to **extend our reach further into the community**. This will ensure our services continue to meet the needs of local people whilst challenging the inequalities faced by our customers, their families, and carers.

A key focus of this strategy is **co-production**; developing services in partnership with those who use them, so that what we deliver truly reflects the needs and aspirations of our community.

At the same time, we remain committed to maintaining the **highest standards of quality** across all our services.



2025-30 Active Plan

Working together to champion inclusion

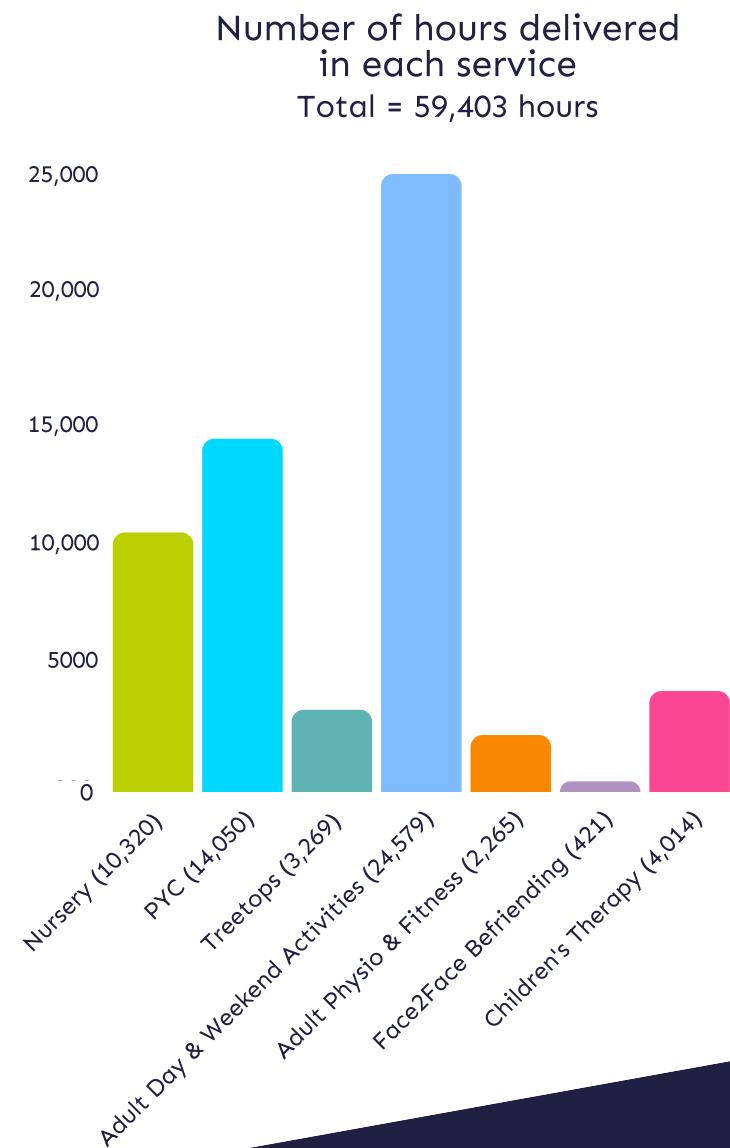
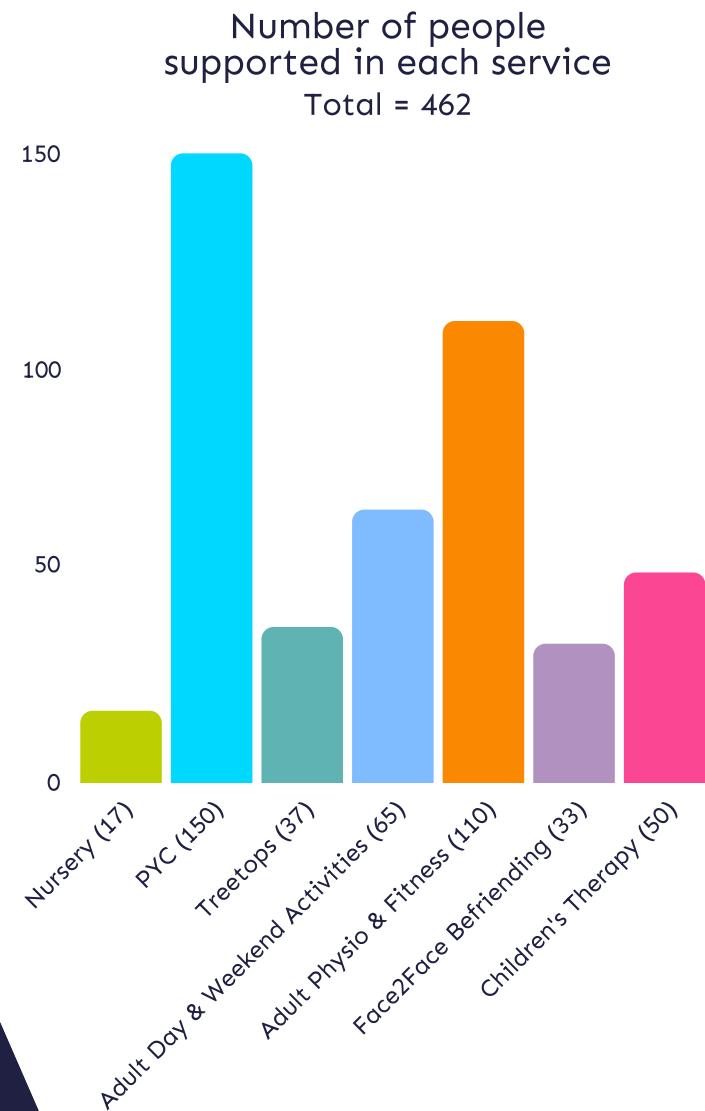
Enriching the lives of children and adults who live in our local community

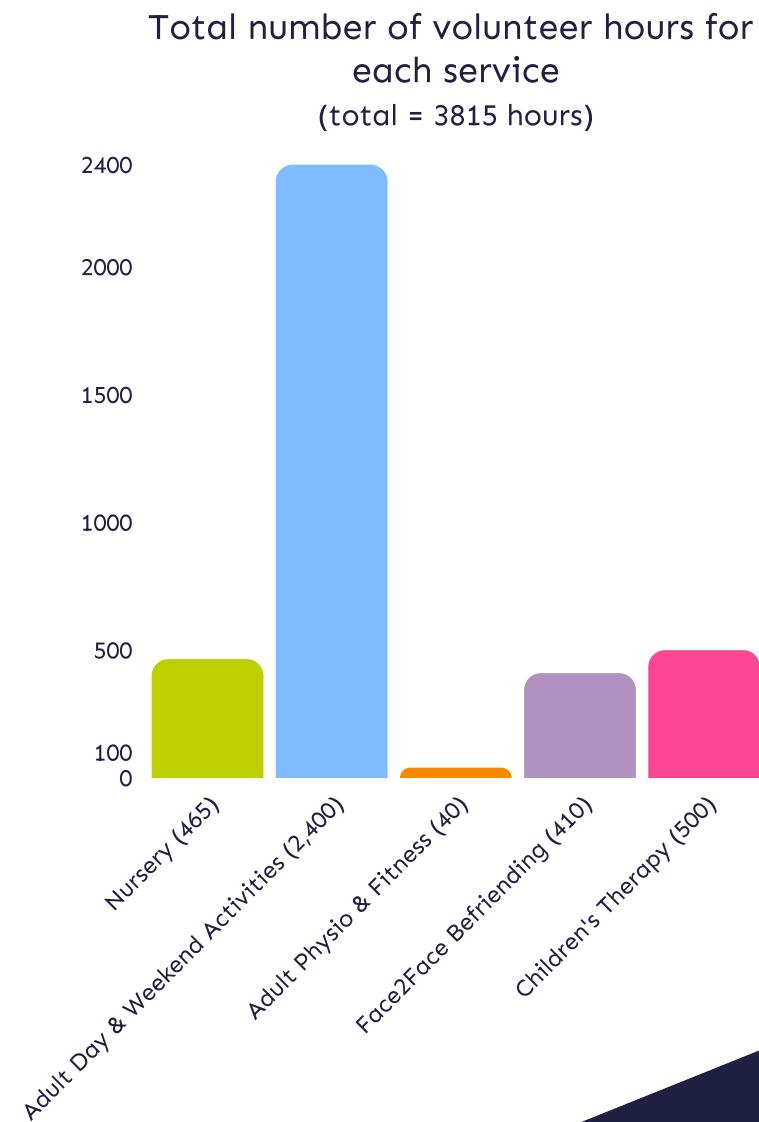
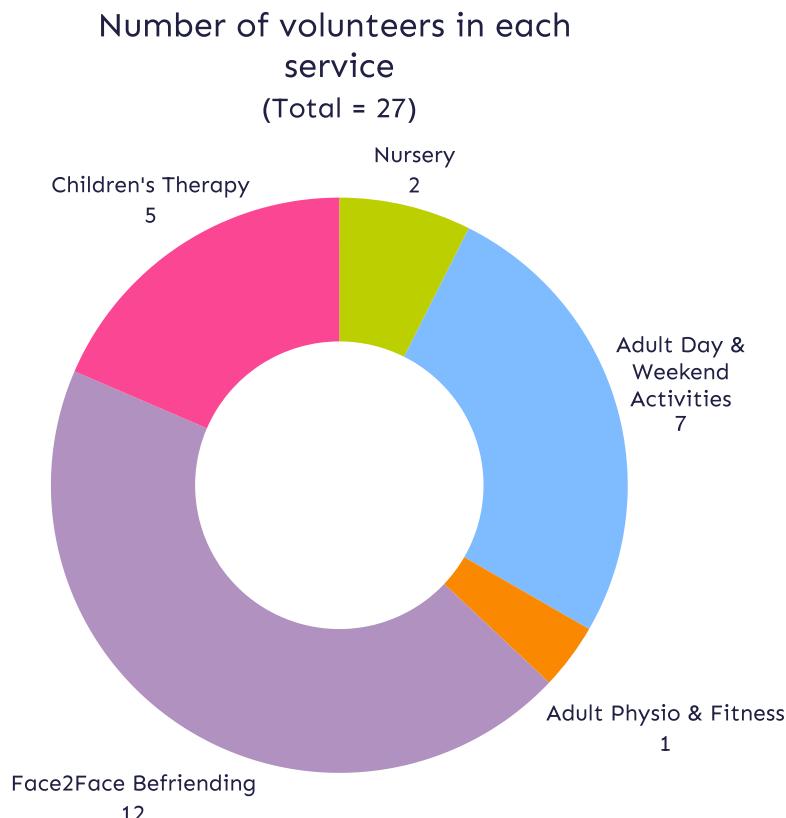


Each year, White Lodge supports more than 1,200 people, thanks to the dedication of our 150 staff, together with the tireless support of our trustees, volunteers, funders, and wider community.

This collective effort ensures that White Lodge **continues to make a lasting difference** in people's lives.







Freddie's Story – Nursery & Children's Therapy

Freddie was born at 26 weeks and faced many medical challenges from the start. His diagnoses include Chronic Lung Disease, Hypotonic Cerebral Palsy, Global Developmental Delay, and reflux disease. He has a tracheostomy, uses a ventilator at night, and receives feeding through a PEG-J tube.



Freddie now attends both White Lodge Nursery and Children's Therapy. He works with a team of therapists every week. His physiotherapist and occupational therapist help him build strength and movement. His speech and language therapist supports his communication. He also takes part in power mobility sessions, learning how to control a chair using a button switch.

This joined-up care means Freddie's progress is supported in nursery and at home. He loves being around other children, watching and copying their actions. His mum has seen big improvements in his social skills.

"We are truly grateful. Freddie's care feels so much more joined-up since joining White Lodge."

Freddie's parents

Vinny's Story – Treetops

Vinny, born in 2011, lives in Chertsey with his mum Leann and siblings. He has Smith-Magenis Syndrome, Autism, and ADHD. He first joined White Lodge in 2017 through the Twinks Play and Youth Club. He now attends Treetops four nights a week throughout the year, which he has built up from day care.

At first, Vinny needed two-to-one support, but with patience and consistent care, he now thrives with one-to-one. Positive relationships with staff have been key in helping him manage his behaviour and build confidence. Known for his cheeky humour, Vinny enjoys Paw Patrol, Peppa Pig, the cinema, and especially Halloween – his favourite time of year.

For his Mum, Leann, White Lodge is more than a service. "They've become part of our family. The love and professionalism they show give us peace of mind and make Vinny feel safe, valued, and supported. We are endlessly grateful for all they do."

"White Lodge and Treetops have been nothing short of incredible in the support and respite they provide for Vinny. The care, dedication, and compassion shown by the whole team is truly unmatched."

Leann, Vinnie's Mum



Jasmine's Story – Play and Youth Clubs

At just 17 months, Jasmine had a stroke and was diagnosed with Sturge-Weber syndrome, a rare condition that causes epilepsy. She often has up to 200 seizures a day. Despite this, she remains full of energy and joy.

Her parents wanted a place where she could play, make friends, and feel safe. White Lodge's Play Schemes gave Jasmine that chance. The trained staff understand her condition, so her parents can relax knowing she is well cared for.

White Lodge has given Jasmine freedom to have fun and develop confidence. For her parents, it has been a huge relief - offering respite and a supportive community.

"White Lodge has been a **game changer** for our whole family. Jasmine loves coming here - it's where **she can just be herself.**"

Lynn, Jasmine's Mum



Kevin's Story – Adult Physiotherapy & Fitness

Kevin came to White Lodge after being diagnosed with Guillain-Barré syndrome, which left him struggling with weakness in his limbs. He needed specialist support to rebuild strength and confidence.



At White Lodge, Kevin found the right help. The therapy team use the LiteGait walking system and hydrotherapy sessions to support his recovery. He enjoys the mix of treatments and the encouragement he gets from staff.

"The atmosphere is fantastic. The team make the hard work enjoyable," says Kevin. His family have also noticed how much he benefits, both physically and emotionally, from his sessions.

Kevin now feels stronger, more independent, and far more positive about his future.

"Coming here is so rewarding - for me and for my family."

Kevin

Amy's Story – Rendezvous

Amy is 25 and lives with Quadriplegic Cerebral Palsy. She requires full support to participate in daily life and access her environment. She attends Rendezvous at White Lodge five days a week with her two carers.

For Amy, the move from full-time education into adult life was a huge change. Her parents worried about what her future would look like without routine, friends, and a sense of purpose. Finding a safe, social, and accessible place for her was not easy.

When they discovered White Lodge, they knew it was the right fit. Amy loves the busy, friendly atmosphere. She enjoys being part of the community, watching others, and sharing her radiant smile. Her favourite activity is hydrotherapy, which helps her body and boosts her wellbeing.

"Rendezvous gives Amy the life she deserves. She's not excluded, she belongs. White Lodge has given her purpose and joy."

Amy's parents



"We support each other here. You've always adapted to meet our changing needs. You do a wonderful job."

Jon



Jon's Story – Rendezvous & Physiotherapy

Jon was diagnosed with Multiple Sclerosis (MS) and has been coming to White Lodge since 2008. At first, he could walk but suffered falls and later moved to a wheelchair. He was referred to Rendezvous for support, socialising, and to give his wife, Diane, some respite.

Jon enjoys the wide range of activities. His favourites are tabletop games and quizzes with friends. He also has physiotherapy every other week, which helps reduce tension in his arms and legs.

He values the safe and supportive environment: "Rendezvous is a place where I feel cared for and stimulated. Diane knows I'm safe, and that means a lot."

For Jon, White Lodge is more than a service - it is a community.

“Beryl gets it – she really gets it. Talking to her made me feel less alone and more hopeful than I have in years.”

A parent who uses the Face2Face service

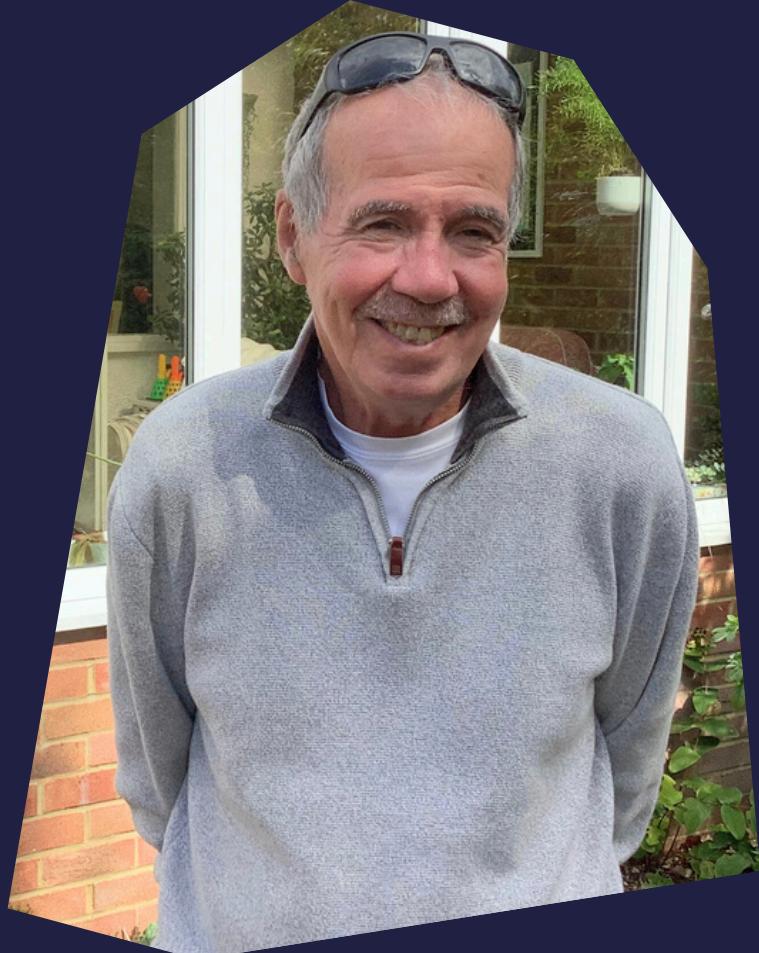
Beryl's Story – Face2Face Befriender

For 25 years, Beryl has been part of the Face2Face befriending service at White Lodge. As a mother of adults with additional needs, she understands what families go through. She uses her own lived experience to support parents who often feel lost and alone.

Beryl offers a safe space where parents feel heard. Many say she has given them hope during their hardest times. She believes listening is powerful. “No parent should feel isolated. When we are heard, something changes inside us,” she explains.

She has walked alongside countless families, helping them see a brighter future. Now, she supports the Parent2Parent group for families of adults with additional needs/disabilities. Her warmth and wisdom continue to make a lasting difference.





Over the last nine years I have been fortunate to make so many friends, both staff, members and volunteers. I am sure we will remain friends forever. Volunteering has given me a structure to my working week. A sense of purpose. A feeling that I am doing something constructive with my time.

Ian Robinson
Volunteer at Rendezvous and Fundraising Events

Claire's Story – Volunteering at Rendezvous

When Claire's daughters moved to London, she began to feel her role as a stay-at-home mum was changing. She wanted something new, something challenging and rewarding. White Lodge was local, and after an interview, checks, and training, she started volunteering at Rendezvous in December 2020.

Claire now gives her time three afternoons a week. She loves the variety each day brings. "No day is ever the same," she says.



"Claire's energy, commitment, and willingness to go the extra mile shine through in everything she does."

Aimi, Deputy Manager,
Rendezvous

She describes Rendezvous as "a hectic but happy place," filled with kindness and patience. Volunteering has given Claire not only a new sense of purpose but also a community to belong to. "I am so very grateful to have been given the job," she shares.

Aimi, Deputy Manager, adds:
"Claire has volunteered at almost all of our events. I can 100% say we would not have managed Christmas dinner week without her help and support. She does like a challenge - let's hope we haven't scared her off for this year!"

Fundraising Statement

We directly employ a dedicated fundraising team to implement our **income generation strategy** across a diverse range of income streams. These include individual giving, public appeals, trusts and grants, corporate partnerships, challenge events, community fundraising, legacies, and a variety of White Lodge-led fundraising and engagement activities.

We do not engage professional fundraisers or commercial participants to solicit donations via door-to-door visits, telephone calls, or public kiosks, and we have no plans to do so in the future. We are pleased to report that there have been no complaints regarding our fundraising activities in the current year.

We are committed to **delivering all fundraising activities to the highest possible standards**. As a registered organisation with the Fundraising Regulator, we regularly review our training and practices to ensure full compliance with the Fundraising Regulator's Code of Fundraising Practice.

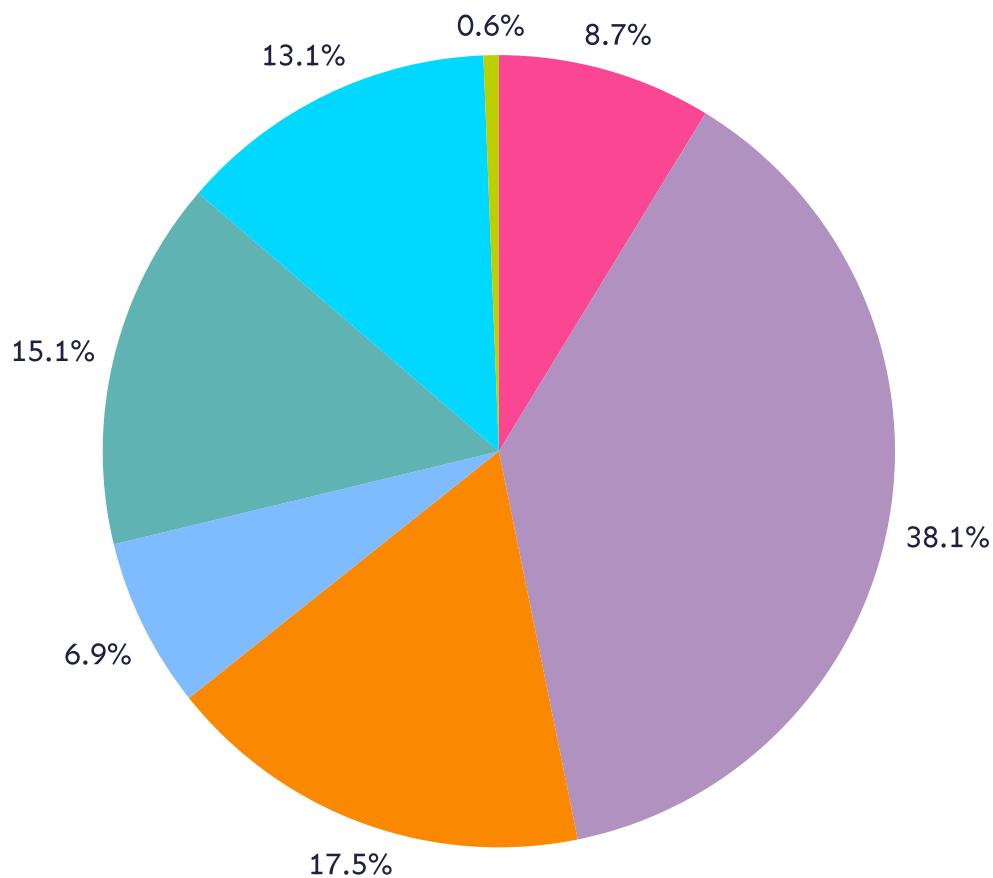
To protect our supporters' privacy and comply with GDPR legislation, we only retain personal data with the explicit consent of the individual. We do not sell or share supporters' personal data, and we have never purchased fundraising data from third parties.



Fundraising Sources

We're deeply grateful to the individuals, companies, pubs, clubs, schools, and charitable trusts who supported us this year through donations, events, and sponsorships. Their efforts have raised an incredible amount.

White Lodge Events	£75,707
Trusts and Foundations	£330,020
Individual Giving	£151,593
Corporates	£60,041
Community Events	£130,623
Challenge Events	£113,426
Legacies & Wills	£5,386

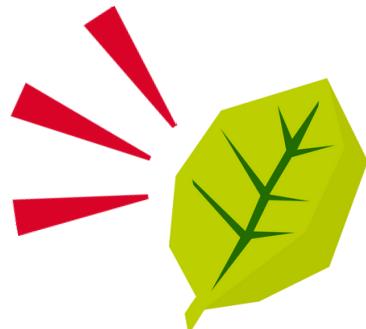


Fundraising Highlights



£61,250

During their captaincy year, the Ladies and Club Captains of **Burhill Golf Club** held events, competitions, and completed the Thames Bridges Trek.



£91,969

From the 2024 **Big Give Christmas Challenge**.
Helping us expand our Physio and Fitness service & purchase new equipment.



£17,014
With GiftAid

In February, 58 brave walkers bared their soles across a **fire walk** of 600 degree hot coals.



£21,457
With GiftAid

14 superhero teams completed the only fully inclusive and accessible triathlon- **Superhero Tri**.



£9,901

From James and Julia Lindon Travers' eighth annual **George Linden Travers Race Day**.

White Lodge Events
Individual Giving
Community Events
Challenge Events



£40,000
After costs

From the golfing community during two **golf days**.



£39,052
With GiftAid

By 8 runners who ran the **London Marathon**, including our first disabled runner.

Volunteering Highlights

In 2024-25, we had:



16 fundraising volunteers

providing

740 hours of fundraising and event support



214 corporate volunteers

providing

996 hours of maintenance to the White Lodge site



25 service volunteers

providing

3815 hours of support across White Lodge services

255
volunteers

5,551
hours of
volunteering

With a total
value of
£103,250

Our Impact - Fundraising Volunteering



Volunteering at White Lodge offers a **rewarding experience** within a welcoming, family-like community. From the very first day, **volunteers feel valued and supported**, quickly forming **lasting friendships** while contributing in a way that fits around their personal commitments.

Every event and activity brings a **sense of purpose, satisfaction, and fun**, as volunteers see their **efforts making a real impact** on White Lodge and the people it supports.

Whether helping at events, supporting members, or simply sharing a smile, **volunteers play a vital role** in the life of the centre and in the wider White Lodge community.

It's like working alongside a large family! I feel valued and appreciated. Everyone mucks in and works together!

Katrina Burtenshaw

We build friendships, and find a sense of rewarding purpose which we can fit around our personal commitments.

Ruth Pender

Our Impact - Fundraising Volunteering



White Lodge approached a group of volunteers at the beginning of 2025 to discuss setting up a committee that could give **special support to the Fundraising department.**

The committee could become an “extended arm” of the Fundraising team, initially taking responsibility for collection cans and bucket-shakes to help generate extra funds.

The **Friends of White Lodge**, FOWL, was formed in February 2025. The members of FOWL meet once a quarter, and the group is developing its scope by arranging its **first fundraising event**, due to take place before Christmas 2025.

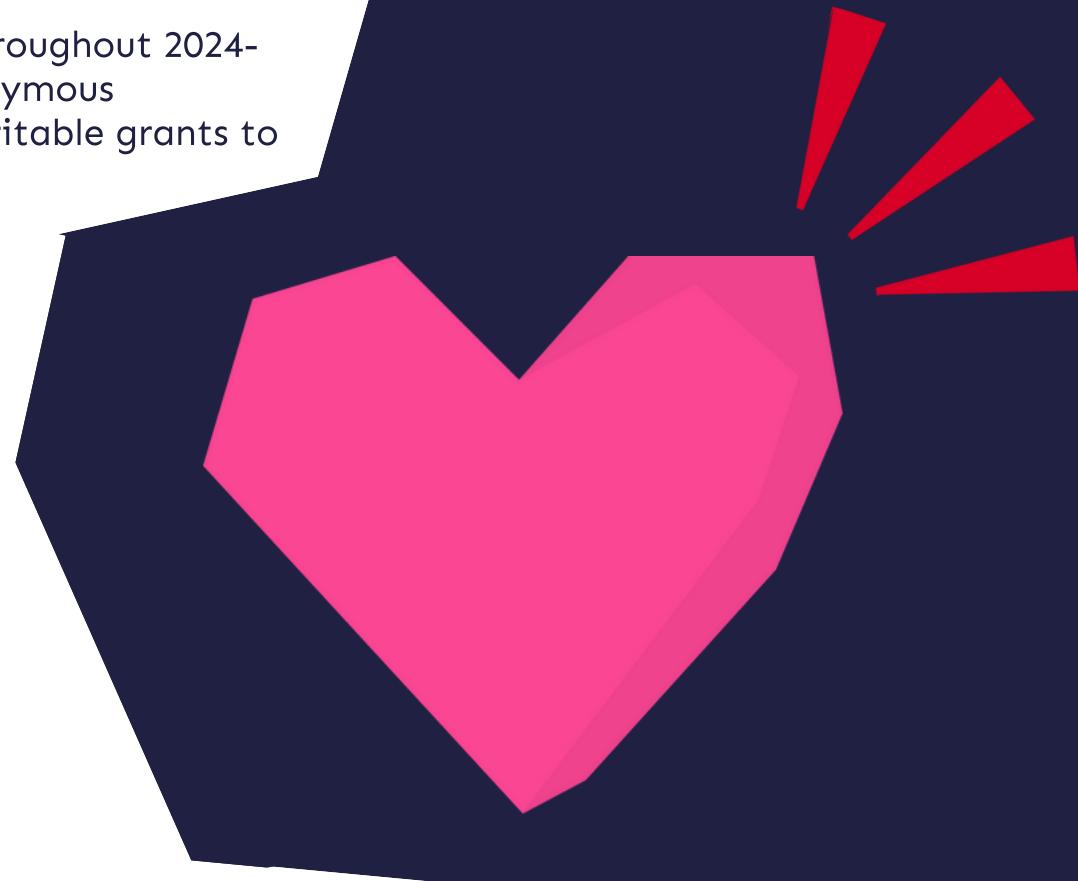
FOWL aims to support White Lodge by raising funds and increasing awareness of the charity. This helps the Fundraising team engage more effectively with the local community, which is central to the charity's aims.



Thank You

Thanks to the many donors and organisations throughout 2024-25 who help us run the charity. This includes anonymous donations and the following who have made charitable grants to White Lodge:

- Advantage Worldwide (UK) Ltd
- Aircraft Golfing Society
- AJ & KM Barnett Charitable Trust
- Ardonagh Community Trust
- Belron International
- Burhill Golf Club
- The Garfield Weston Foundation
- Gartner
- Golden Acre Foods Ltd
- The Henry Smith Charity
- James Jar of Gifts
- Manali Charitable Trust
- Masonic Charitable Foundation
- Old Strodians Lodge
- Peaceful Streams Charitable Trust
- ProAV Ltd
- The Ratcliffe Charitable Trust
- The Reed Foundation
- The Shanly Foundation
- Sparks Fund
- Wooden Spoon, Children's Charity of Rugby



We extend our heartfelt thanks to all of our incredible volunteers who so generously give their time, energy, and skills to White Lodge. Whether through direct services, vital fundraising efforts, or supporting our many events, their commitment makes an extraordinary difference to the Charity.



For the year ending 31 March 2025, White Lodge generated an **income of £3,302,000** - an increase of £308,000 compared to the previous year. This growth reflects not only the generosity of our donors but also the dedication of our volunteers, to whom we are deeply grateful.

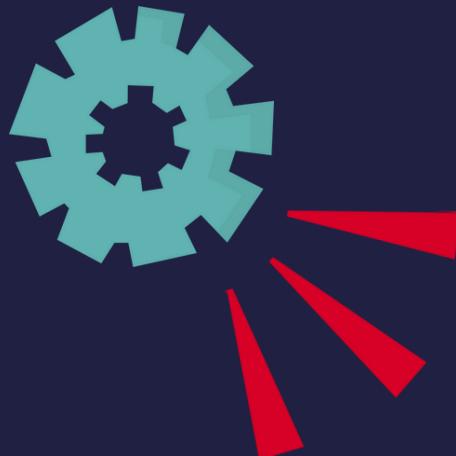
It was a **strong and encouraging year** for fundraising, with notable progress across key areas. Our overall target was to raise £819,000 through a mix of restricted and unrestricted funds. We came close to meeting our restricted fundraising goal, raising £207,000 against a target of £209,000. For unrestricted funds, we surpassed expectations, achieving £659,000 against a target of £610,000.

These vital funds were made possible through the support of **trusts** (£330k), **individual giving** (£151k), **legacies** (£5k), and **other donations** (£380k).

Our total **expenses** for the year were **£3,398,000**, an increase of £148,000 compared to the previous year. This rise in costs reflects both the growth in the number of service users we support and the general increase in operating expenses. In addition, we carried out **essential repairs and maintenance** across our buildings to ensure we continue to provide facilities that meet the high standards our service users deserve.

As a result, we reported a deficit, after depreciation, of £96,000. Encouragingly, this represents a **significant improvement on the previous year's deficit** of £256,000, an overall reduction of £160,000.

Financial Overview



Net deficit on services before fundraising and depreciation

Fundraising surplus

Net surplus / (deficit) before depreciation

Depreciation

Net deficit

	2024/25	2023/24
	£000s	£000s
Net deficit on services before fundraising and depreciation	(240)	(337)
Fundraising surplus	435	353
Net surplus / (deficit) before depreciation	195	16
Depreciation	(291)	(272)
Net deficit	(96)	(256)

The Trustees remain committed to achieving a positive operational balance each year, with major equipment purchases funded separately through dedicated fundraising efforts. For 2024/25, the target was a surplus of £9,000 before accounting for depreciation.

At year-end, total fixed assets stood at £4.568 million, compared with £4.717 million in the previous year. The reduction was largely due to a depreciation charge of £291,000. This was partially offset by £140,000 of additions during the year, including the installation of a **new sensory room**, the purchase of **physiotherapy equipment** such as a LiteGait machine, renovation works at Treetops, and several smaller asset investments.

We are also pleased to report that our government-backed pandemic loan was **fully repaid ahead** of schedule during the year.

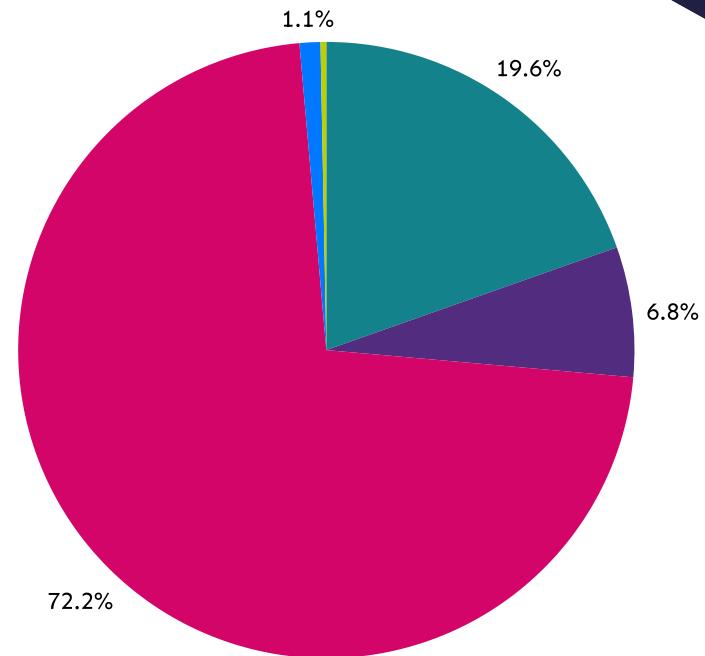
Income

Total Income:

£3,302,000



Unrestricted donations and legacies	£647,000
Restricted donations and legacies	£225,000
Income for charitable activities	£2,384,000
Income from trading activities	£36,000
Income from investments	£10,000



Total income is £308,000 higher than last years' result of £2,994,000.

Expenditure

Total Expenditure:

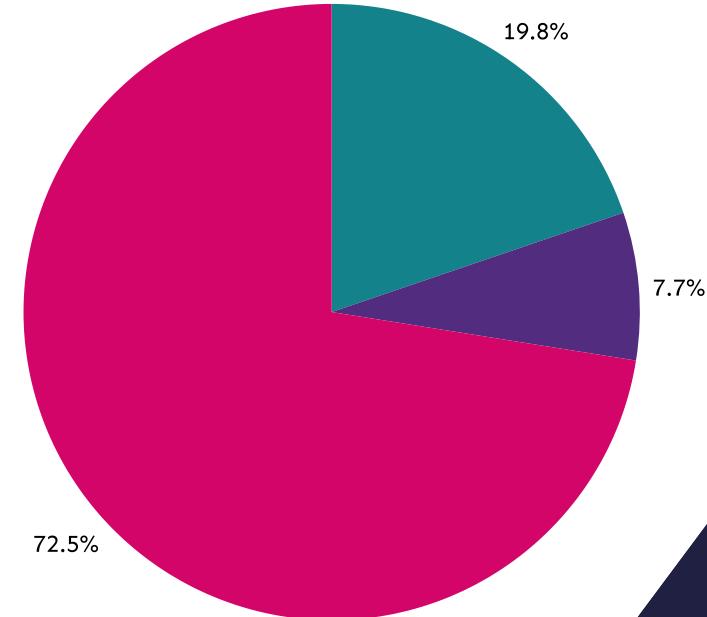
£3,398,000

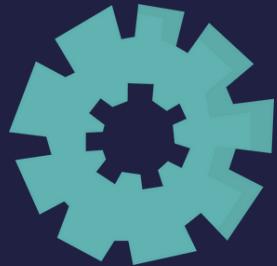


Expenditure on adult's services £672,000

Expenditure on fundraising £263,000

Expenditure on children's services £ 2,463,000

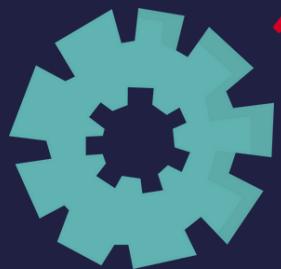




At the end of the 2024/25 financial year, total **reserves stood at £438,533** of which £294,193 was unrestricted. These reserves represent internal funds set aside to safeguard against revenue shortfalls or unexpected costs.

The Trustees consider that a minimum level of £400,000 in unrestricted freely available reserves is necessary to provide appropriate financial resilience. Reducing this shortfall remains a **key priority**, with plans in place to restore reserves to the required level over the next four years.





The Board of Trustees **guides our approach to risk** at White Lodge. We understand that we can't eliminate all risks; some are just part of the nature of our work and beyond our control. The Senior Management Team (SMT) monitors these risks and manages them. We want to be in the best position possible, though we can't guarantee 100% protection.

We've got a **solid system** in place to monitor risks. We rank them based on how likely they are to happen and how much impact they could have on White Lodge.

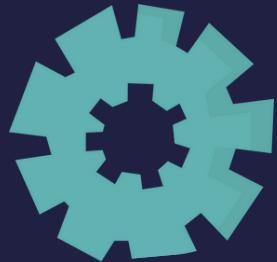
Our main challenges are to:

- Keep our services at a high standard.
- Recruit and retain great staff.
- Maintain a sustainable funding model.
- Meet our voluntary income targets.

The Risk Register, which tracks these risks, gets reviewed quarterly. Day-to-day risk management is handled by SMT, who stay on top of it throughout the year.

The Board approves an annual budget and plan for White Lodge, and regularly checks how we're doing against these plans. Any big changes or new financial forecasts are shared with the Finance Committee and the Board.

With these systems and our financial controls and reserves policy, **the Board is confident we can handle any challenges.**

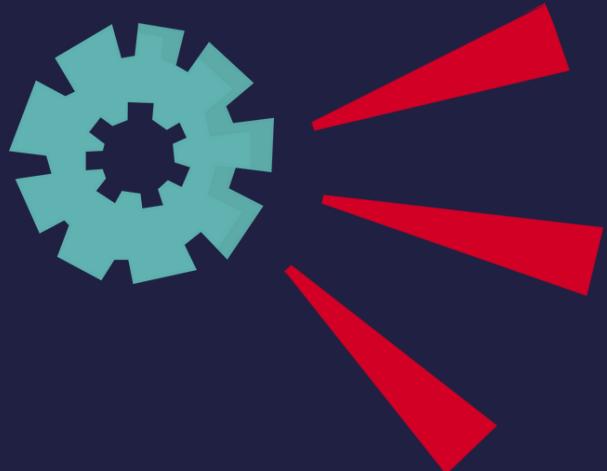


At White Lodge, the Trustees take financial governance seriously. Each quarter they review finance reports and key performance indicators (KPIs) to check we're meeting our charitable goals and can keep doing so.

For 25/26, we've planned a detailed budget. It forecasts a small surplus of £11,000 (before depreciation). This is based on a net services deficit of £403,000 (before depreciation).

We aim to raise unrestricted funds of £689,000 through fundraising, with costs of £275,000 leaving us with a surplus of £414,000.





White Lodge is a leading example of an inclusive, disability confident employer who provide the necessary support and encouragement to their employees.

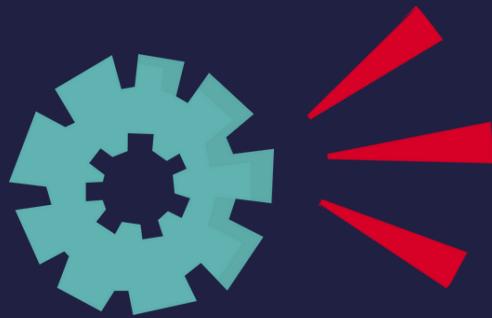
Employment Support Specialist, Surrey Choices.

At White Lodge, we continue to uphold a **transparent and fair pay structure** for all employees.

We have established clear salary bands for each role, ensuring that everyone understands how pay is determined. These bands are **reviewed annually** and benchmarked against industry standards, so we remain competitive and consistent with best practice. This approach supports **fair, unbiased decisions** around pay.

We are committed to ensuring equal pay for equal work. Each year, we review salaries across the organisation to **confirm that men and women are paid fairly and equally** for the same roles. Beyond pay, we remain dedicated to **providing equal opportunities for all**.

We invest in our people, supporting their professional growth so **they can thrive** both at White Lodge and in their wider careers.



Over the past 20 years, a lot of progress has been made in closing the gender pay gap, but differences still exist in some areas. At White Lodge, **we're committed to fairness and equality** for everyone who works with us.

The latest UK figures show that, overall, men still tend to earn a bit more than women. In 2023, the gender pay gap for full-time workers was 7.7%. Interestingly, for people under 40, the gap is almost zero, which matches our team well, since most of our staff are under 40.

In the care sector, women make up the majority of the workforce, and that's true for White Lodge too. We're **proud** to have **a good mix of men working with us**, more so than many other organisations in the same field.

The **mean** (average) gender pay gap in hourly pay **favours women**. For every £1 a woman earns, a man earns 92p.

-8.5%

The **median** gender pay gap in hourly pay. The median is the middle point of a range of numbers arranged in order. This is **in favour of women**; every £1 a woman earns, a man earns 91p.

-9.8%



We know the gender pay gap is still a challenge, influenced by things like age, role, and career stage. At White Lodge, we'll keep **working to make sure everyone is treated fairly and paid equally** for the great work they do.

Leadership

It is the responsibility of the Board of Trustees to ensure the **efficient, legal, and professional performance** of White Lodge. The CEO works with the Board to set a strategic framework. They agree on a direction and report on the charity's goals.

The SMT is delegated the operational day-to-day running of the organisation.

The SMT is:

- Lesleigh Bounds - Chief Executive Officer
- Leyla Beacham - Finance Manager
- Mike Hey - Head of Fundraising and Marketing
- Jane Hunter - Marketing and Communications Manager
- Megan McPate - Human Resources Manager
- Louise Redman - Service Delivery Lead for children's services
- Kathryn Winfield - Service Delivery Lead for adult services

The SMT reports to the Trustees via sub-committee and quarterly meetings.



Admin Report

The organisation is a charitable company limited by guarantee, incorporated on 20 October 1981. The company was established by a memorandum of association, last amended on 10 January 2017. This document sets out its charitable purposes and powers. It is governed by its articles of association. All Trustees give their time voluntarily and receive no benefits from the charity.

Executive committee

- Neil McIntyre – Chair (appointed as Chair in May 2023)
- Graham Barlow
- Juliette Barnes
- Mike Meredith
- Kevin Parke
- Sita Soni
- Lisa Wall (from 20/3/25)
- Kristy Wall (from 7/3/25)

These Trustees reached the end of their term

- Sophie Taylor (26/02/25)
- Jane Stuart-Palikira (5/11/24)

Advisors - auditors & bank details

- **Auditor:** Warner Wile Limited, 4 Marigold Drive, Bisley, Woking, Surrey, GU24 9SF. Telephone: 01483 488767
- **Bank:** National Westminster Bank plc, 73 High Street, Walton-on-Thames, Surrey, KT12 1DW



Trustee Recruitment

After recruitment, our new Trustees must complete **governance training** by our legal representative. They will also do an induction program managed by the Chief Executive and the HR Manager.

New Trustees receive induction material. It helps them **understand White Lodge's charity, finances, and plans**. The new Trustees visit the on-site services. They attend any charity fundraising activities.



All Trustees have access to the:

- Copy of Memorandum and Articles of Association.
- Organisational Strategy.
- Most recent annual report and accounts.
- Key Policies – safeguarding, finance, governance and fundraising.
- Annual Risk Register.
- Copies of Charity Commission leaflet CC3 "The Essential Trustee: what you need to know" and Companies House booklet "Being a Director".
- Roles and Responsibilities of a Trustees Document - there is additional information within this document.
- Committee terms of reference.



Roles & Responsibilities

The Trustees **set the charity's strategy** and check its **progress**. They give daily management to the CEO and the Senior Team. The Board meets often to review all key work. Trustees also run smaller groups called sub-committees. These cover Finance and Fundraising, Quality and Safety, and People and Governance.

The Trustees must prepare yearly reports and financial statements. They follow the law and UK accounting rules (UK GAAP). The Finance and Fundraising Committee leads this work.

By law, Trustees must produce yearly financial statements. These must give a true and fair picture of the charity's money - its income and its spending.

When preparing these reports, Trustees must:

- Choose the right accounting methods and use them the same way each year.
- Follow the rules in the Charities SORP.
- Make fair and careful judgments.
- Explain if they depart from UK accounting rules.
- Assume the charity will continue to operate, unless there is reason to believe it will not.

Trustees also keep **accurate accounting records**. These must show the charity's financial position and meet the rules in the Companies Act 2006.

They must protect the charity's assets and guard against fraud or errors. They must share all audit information with the auditor and make sure nothing is hidden.