



**The Otter Valley Association  
TRUSTEES' REPORT  
for the year ended 31 March 2023**

# Aims

The Otter Valley Association was established in 1979 as a civic amenity society covering the civil parishes and environs of Budleigh Salterton, East Budleigh with Bicton, Otterton, Colaton Raleigh, Newton Poppleford and Harpford with Venn Ottery.

Its principal aims for the benefit of the public are (*in summary*):

- to promote the conservation, protection, restoration and improvement of the physical and natural environment.
- to encourage high standards in the management and sustainable development of the built and natural environment.
- to educate the public in geography, history, natural history and lands and buildings of importance in the area.
- to encourage the development of individuals and communities to understand and take action to conserve, protect and improve the quality, beauty and character of their locality
- to support and liaise with other charities with similar objectives.

## Organisation

The OVA's activities are governed by a written Constitution, which sets out its objects and regulations. It is registered with the Charity Commission, and is subject to the legislation applicable to charities, in particular The Charities Act 2011.

A copy of the Constitution is always available on request and can be downloaded from our website **[www.ova.org.uk](http://www.ova.org.uk)**.

## Management

The management and administration of the OVA is carried out by the Executive Committee (EC), which during the year met ten times. This Committee normally consists of the Chairman, Vice-Chairman, Treasurer, Secretary, and up to twelve other members of the Association. Members of the Executive Committee, all of whom are Charity Trustees, are elected annually at the Annual General Meeting.

The names of those who served as Trustees during the year under review are listed elsewhere in this report.

# Trustees Report of Activities for 2022~2023

## Chairman's Introduction

This year's AGM will see, subject to the agreement of the membership, some changes to the composition of the Executive Committee (EC). Perhaps the most significant is the proposed combining of the positions of Treasurer and Membership Secretary. There has always been a very close relationship with these two positions. It will bring a greater workload to Martin Smith, but he assures me that he is up to it!!

I would like to thank Clive Bowman who has held the position of Membership Secretary for so many years, amongst other positions. I would like to thank George Maddaford, who is taking a well-deserved retirement after being Budleigh Salterton's town representative for many years. I would also like to thank Brian Leveridge for his examination of the OVA accounts for the past 20 years; we wish him well in his retirement. We now welcome Dee Woods, who as a retired planner, has taken on the role of co-ordinator of the Built Environment Sub-Committee, after its brief period of dormancy. Again subject to agreement of the members.

During the course of this last year, perhaps our strongest contribution to the ethos of the OVA, has been the regular and much enjoyed walks programme. The group who organise and lead this activity, have conjured up numerous walks which have really put our name on the map. Thanks to them all. We have attended meetings of the East Devon Area of Outstanding Natural Beauty as partner members and made our contribution. We have had at least three of our members who have sat on the liaison group of the Lower Otter Restoration Project.

We have enjoyed a series of very successful winter talks, latterly filling the venue to capacity. Well done to Andrew Kingsnorth who drew together, so many excellent speakers. He also produced our Newsletter which has gone from being excellent to even greater heights. Geoff Porter organised the litter pick last September in partnership with Clinton Devon Estates. Plans are already afoot for this year's adventure, again in September. We give prizes for the most unusual/interesting finds. Usually by children, they probably have keener eyes. We are also becoming involved in 'Making Rivers Better' a nation-wide project to monitor the cleanliness of river waters by Citizen Scientists.

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At our last AGM, members approved the newly revised Constitution, May 2022. Before this document becomes 'official', we have to have the approval of the Charity Commission (CC). This has taken rather longer than was anticipated. Only 'Clause 3: 'Objects'', remains to be agreed, however we are using the remainder of the document. This final hurdle is currently being worked upon.

Much thought has been given to the subject of a New Members party and our usual Xmas party. The growing number of new members eligible to attend and the diminishing number of members who enjoy our Xmas party, leads us to believe that perhaps a combined party is called for? Feedback from members would be appreciated.

This year we have sadly lost one of our founder members, namely Anita Jennings. She was a great crusader and even in her later years, never lost interest in local matters. She has left a generous legacy to the OVA. There will be a more lengthy obituary in the next edition of the Newsletter.

Finally, I would like to thank all the members who have given so much of their time and effort into making the OVA the organisation that it has become.

Bob Wiltshire, Chairman

## **Natural Environment**

The Lower Otter Restoration Project – *see below*.

As mentioned in the Chairman's Report, the (delayed) annual estuary clear-up took place in September in conjunction with Clinton Devon Estates. This was attended by several volunteers and a considerable amount of rubbish was collected.

We have also planted more Scots Pine up in the "Clump". Sadly, the young trees that we bought arrived rather dried up and sad and, whilst we did our best to nurture them, they have all died. We plan to try again this coming season.

In addition, Geoff Porter has become a qualified water sampler for the West Country Rivers Trust and is planning to take regular samples of the fresh-water streams within our area to ensure that no obvious pollution is taking place.

Chris Hodgson

## **Lower Otter Restoration Project**

The most obvious change to the environment within the Lower Otter has been those associated with the Lower Otter Restoration Project (LORP). Whilst this project is not directly associated with the OVA, we have been keeping an eye on how this is developing and have discussed various aspects with the developers.

The Lower Otter Restoration Project Stakeholder Group was set up to provide a forum for effective interchange of information between the project partners and other interested parties. It enabled open discussion of issues, with the intention of reaching consensus where possible. The stakeholder group was chaired by Councillor Tom Wright.

## **Walking with the OVA, 2022-2023 review**

It has been a great relief to have a full year without restrictions on locations, numbers and so on for our walks. One positive aspect of the pandemic experience is the increased awareness of the value of exercising and socialising outside in natural surroundings, in our case in the beautiful Devon countryside. Our walk leaders continue to impress with their ingenuity in coming up with new locations and themes as well as offering old favourites. We invited them to participate in a First Aid course with an accent on outdoor emergency situations. This was a refresher for most of us but new ground for others. We took this opportunity to review and upgrade the contents of the First Aid kits that leaders carry on their walks. Better to be safe than sorry!

During the past year to end-March 2023, 388 walkers have undertaken a total of 44 walks giving an average attendance of 9 walkers. This represents around 25% fewer walks on offer than the latest 'normal' (pre-Covid) year. To encourage our 18 walk leaders to continue offering their time and knowledge to the walks programme we are adopting a more flexible approach to the process that will help those who cannot commit to a date up to four months in advance. Walk details and even new dates can now be added to the programme after the quarterly newsletter has been published. They are uploaded to the Walks pages on the website, which is also our primary means of communicating last-minute changes.

Jon Roseway and the Walk Team  
Jane Connick, Penny Kurowski, Paul Kurowski

# Built Environment

We have continued to monitor planning applications, and comment on those that are considered to be contentious and harmful to the local area or neighbourhood. In addition, the consultation on the Draft Emerging Local Plan 2020-2040 was widely publicised, and members encouraged to submit their comments and views to East Devon District Council. The Executive Committee also sent in a detailed report, commenting on various issues of concern, such as the proposed spatial strategy, housing numbers and allocations, design and heritage, sustainable tourism and travel and the natural environment. The full report is on the website.

Dee Woods

# Membership Report

At the end of March 2023 the Otter Valley Association had a total of 508 memberships, amounting to some 805 persons. These figures constantly vary as new members join and others leave and during 2023 24 more people left us than joined. We hope to reverse this trend in future years.

Martin Smith, Treasurer/Membership



# Risk management

The major risks to which the Association is exposed are reviewed on a regular basis. Policies and controls have been established to mitigate those risks. These include appropriate property and public liability insurance.

# Treasurer's Report

As life has returned to normal following the pandemic, so has the OVA. Our programme of walks and talks has resumed and a Christmas Party took place at Woodbury Park. However, as reported elsewhere, the OVA is desperately short of volunteers and committee members to organise and run our events. We now have an interim editor for our newsletter that is back to being published quarterly, although the associated costs have increased.

You will see from the financial report that the OVA has run a deficit this year. Two exceptional costs were incurred: a large mailing to all of our members with papers for last year's AGM, including an updated constitution, amounted to £1316.00 and our website upgrade (£1848.00). The software that ran our website would not have been supported from November 2023 so an upgrade was essential. We were fortunate in that 50% of the costs of the upgrade were funded by the AONB Community Project Fund (£924.00). Many thanks to the AONB for their financial help.

Thank you, again, to all our members who have continued to support us. As you will be aware by now, we have had to increase membership fees to contain rising costs with effect from 1<sup>st</sup> April this year. If you haven't done so already, please amend your standing orders to reflect the new rates.

During the year we made donations to the Conant blue plaque and the Budleigh Information Centre (they continue to promote us by handing out our leaflets and selling *Twelve Walks in the Otter Valley*).

Assets at the close of the financial year stand at £23,526. Of this, £10,000 is held as a contingency for unexpected eventualities, £10,000 is allocated to fund worthwhile projects in the lower Otter valley, and the remainder is to meet occasional shortfalls in our regular activities.

I must thank Brian Leveridge for his assistance in preparing these accounts and ensuring that everything is in order for what is his final audit. Brian has decided that now is the time to 'retire' and is finally hanging up his green pen. He has been examining our accounts since 2003; a fine record indeed. We wish him well in his retirement.

Martin Smith, Treasurer

**Otter Valley Association ~ Registered Charity No: 278266**  
**Statement of Financial Activities for the Year Ended 31 March 2023**

|                                       | <b>2023</b> | <b>2022</b> |
|---------------------------------------|-------------|-------------|
|                                       | £           | £           |
| <b>Incoming Resources</b>             |             |             |
| Membership                            | 4104        | 4066        |
| Donations                             | 38          | 255         |
| Surplus on Talks                      | 1086        | 146         |
| Surplus on Events                     | 0           | 26          |
| Surplus/(deficit) on Publications     | 253         | 319         |
| Gift Aid                              | 767         | 1543        |
| AONB Community Project Fund           | 924         |             |
| Interest                              | 84          |             |
|                                       | 7256        | 6355        |
| <b>Resources Expended</b>             |             |             |
| Newsletters                           | 3517        | 2932        |
| Publications                          |             | 135         |
| Affiliation Fees                      | 125         | 125         |
| Insurance                             | 434         | 758         |
| Website Maintenance                   | 2232        | 300         |
| Deficit on Events                     | 274         |             |
| Wildflower Donations                  |             | 781         |
| AGM 2022                              | 1316        |             |
| Roger Conant donation                 | 50          |             |
| Walk leaders First Aid course         | 468         |             |
| BS Info Centre donation               | 100         |             |
| Administration                        | 704         | 692         |
| Parish Magazine Donations             |             | 200         |
|                                       | 9280        | 5923        |
| <b>Net Surplus (Deficit) for Year</b> | (2024)      | 432         |
| <b>General Fund</b>                   |             |             |
| Balance at Start of Year              | 25,550      | 25,118      |
| Balance at End of Year                | 23,526      | 25,550      |



**Otter Valley Association Registered Charity No: 278266**  
**Balance Sheet at 31 March 2023**

|                                    | 2022          | 2021          |
|------------------------------------|---------------|---------------|
|                                    | £             | £             |
| <b>Current Assets</b>              |               |               |
| Cash at Bank                       | <u>23,526</u> | <u>25,550</u> |
| <b>Net Assets</b>                  | <u>23,526</u> | <u>25,550</u> |
| <b>Represented by:</b>             |               |               |
| <b>General Fund (Unrestricted)</b> | <u>23,526</u> | <u>25,550</u> |

**Notes:**

1. The accounts are prepared on a receipts and payments basis.
2. No remuneration has been paid to any Trustee during the year.

Approved by the Committee on 25<sup>th</sup> April 2023  
and signed on their behalf by:



Martin Smith, Treasurer

## **Policy on Reserves**

The OVA aims to build up sufficient reserves:

£10,000 is held as a contingency for unexpected eventualities;

£10,000 is allocated to fund worthwhile projects in the Lower Otter Valley;

the remainder is to meet occasional shortfalls in our regular activities.

**Independent Examiner's Report**  
**to the Trustees of The Otter Valley Association**  
**Charity No: 278266**

I report to the trustees on my examination of the accounts of the Otter Valley Association for the year ended 31 March 2023.

**Responsibilities and basis of report**

As the charity trustees of the Otter Valley Association you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 (the Act).

I report in respect of my examination of the accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent Examiner's Statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. Accounting records were not kept in respect of the Otter Valley Association as required by section 130 of the Act; or
2. The accounts do not accord with those records; or
3. The accounts do not comply with the applicable requirements concerning the forms and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signature



5<sup>th</sup> May 2023

B E Leveridge C.A.  
44 Honey Park Road  
Budleigh Salterton  
EX9 6EG

# Reference and administrative information

|                         |  |
|-------------------------|--|
| Name of Charity:        | Otter Valley Association   |
| Correspondence address: | PO Box 70, Budleigh Salterton, EX9 6WN                                   |
| Registered Charity No:  | 278266   |
| Independent Examiner:   | Brian Leveridge, 44 Honey Park Road,<br>Budleigh Salterton EX9 6EG       |
| Bankers:                | Lloyds Bank Plc, online account<br>Virgin Money plc, Newcastle upon Tyne |

## Trustees

The following people served as Trustees during the year:

|                   |   |
|-------------------|---|
| Bob Wiltshire     | Chairman  |
| Haylor Lass       | President and Newton Poppleford                         |
| Andrew Kingsnorth | Vice Chairman, Newsletter Editor<br>and Talks Organiser |
| Jane Kewley       | Secretary   |
| Martin Smith      | Treasurer   |
| Clive Bowman      | Membership Secretary                                    |
| Chris Hodgson     | Natural Environment                                     |
| George Maddaford  | Budleigh Salterton                                      |
| Geoff Porter      | Otterton and Natural Environment ( <i>part year</i> )   |
| Dee Woods         | Built Environment and Otterton ( <i>part year</i> )     |

*There are vacancies for an Events organiser and Colaton Raleigh and East Budleigh Parish Representatives.*

This Trustees Report was approved by the Trustees  
on 23<sup>rd</sup> May 2023  
for publication on request and on the website.