

**REGISTERED CHARITY NUMBER: 1048838**

**Morley Elderly Action**  
**Report of the Trustees and**  
**Unaudited Financial Statements for the Year Ended 31 March 2025**

## **Morley Elderly Action**

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**Morley Elderly Action**  
**Report of the Trustees**  
**for the Year Ended 31 March 2025**

The trustees present their report with the financial statements of the charity for the year ended 31 March 2025. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

**OBJECTIVES AND ACTIVITIES**

Morley Elderly Action was formed as a charity no. 1048838 in 1995 under the original title of Greater Morley Community Care Project and subsequently registered a name change to Morley Elderly Action in 1998. We were established to promote the relief of the elderly within the Greater Morley district of Leeds (the area of benefit) in any manner deemed by law to be charitable. Our Mission Statement is 'To assist the over 60s to live independently at home' and we achieve this by a wide range of services including: Community Tea Rooms, Singing group, Games/quizzes, Gardening, General Help and Advice, Home Visits, Lunch Clubs, a Memory Café for Dementia Clients, a Men's group, Newsletters, Sign Posting, Coffee Mornings, Trades Lists and a once a year courtesy call to all members.

Morley Elderly Action is a member of the Leeds Older People's Forum and operates under a Neighbourhood Network Service Contract with Leeds City Council's Adult Social Care.

We are an associate member of Voluntary Action Leeds and Advocacy Network Leeds and we work in partnership with Schools, the Police and the Fire Service and with other faith, statutory and voluntary organisations to achieve our objectives.

We have 1,573 members, who pay £8.00 per year, and who receive newsletters and a trades list but we also serve the general public (the over 60s of Greater Morley) so that services are not restricted to members alone. Our services are delivered by 3 full time staff and 48 active volunteers who on an annual basis contribute over 4,881 hours of voluntary output.

In undertaking the above noted activities, the trustees have had due regard to the guidance issued by the Charity Commission on public benefit.

**ACHIEVEMENT AND PERFORMANCE**

Morley Elderly Action continues to expand its range of activities and services. Figures for 31 March 2025:

No. of members/service users	1,573
No. of volunteers	48
Volunteer hours contributed per year	4,881 hrs
Households benefitting with a garden service (1)	337
Total recorded services (2)	22,012

Notes:

(1) Including other wards

(2) Includes Newsletters and Trades Lists

**FINANCIAL REVIEW**

In 2011 Leeds City Council finally completed the first Neighbourhood Networks Support for Older People Contract. A new five year Contract started on 1st September 2018 with a two year added in 2023.

The reserves policy is to have a reserve of 12 months costs, represented by a sum invested of approximately £25,000 and to keep a minimum of £100,000 in the general account. A budget has also been put into place by the management committee of £10,000 to maintain the upkeep of the building. The fall-out from the global credit crunch has adversely affected the investment portion of our reserve portfolio although this will eventually bounce back.

**Morley Elderly Action**  
**Report of the Trustees**  
**for the Year Ended 31 March 2025**

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

Management Committee Trustees are elected at the Annual General Meeting and/or if mid-term co-opted to bring in specialist skills or knowledge and confirmed in post at the next AGM.

The Committee shall consist of not more than 8 members elected by the membership at each Annual General Meeting, and representatives nominated by various statutory bodies. In addition the Committee so formed can co-opt not more than 2 additional members.

The Management Committee meets 10 times a year and in addition holds an Annual General Meeting. Input is taken into account from stakeholders, volunteers, members and service users and in addition we hold sub-group meetings and carry out annual satisfaction surveys.

**REFERENCE AND ADMINISTRATIVE DETAILS**

**Registered Charity number**  
1048838

**Principal address**  
Wesley House  
32 Wesley Street  
Morley  
Leeds  
West Yorkshire  
LS27 9ED

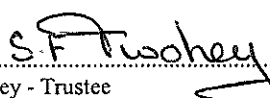
**Trustees**  
Cllr T Leadley Chair  
M Sidgwick Secretary  
A Lynch  
S Twohey Treasurer  
M Hamilton  
M Smyth  
M Madden

**Independent Examiner**  
KJA Kilner Johnson Ltd  
Network House  
Stubs Beck Lane  
Cleckheaton  
BD19 4TT

**Bankers**  
Royal Bank Of Scotland  
Northgate  
Wakefield  
West Yorkshire  
WF1 3XA

Lloyds TSB  
75 Commercial Street  
Batley  
West Yorkshire  
WF17 5EQ

Approved by order of the board of trustees on 16/6/25 and signed on its behalf by:

  
.....  
S Twohey - Trustee

**Independent Examiner's Report to the Trustees of  
Morley Elderly Action**

**Independent examiner's report to the trustees of Morley Elderly Action**

I report to the charity trustees on my examination of the accounts of Morley Elderly Action (the Trust) for the year ended 31 March 2025.

**Responsibilities and basis of report**

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

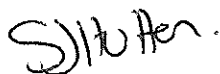
I report in respect of my examination of the Trust's accounts carried out under Section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under Section 145(5)(b) of the Act.

**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 Trust 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 form 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 independent 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.



Samantha Hutton FCCA

KJA Kilner Johnson Ltd  
Network House  
Stubs Beck Lane  
Cleckheaton  
BD19 4TT

Date: 16 June 2025

**Morley Elderly Action**

**Statement of Financial Activities  
for the Year Ended 31 March 2025**

	Notes	Unrestricted fund £	Restricted funds £	2025 Total funds £	2024 Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>					
Donations and legacies		23,893	-	23,893	24,190
<b>Charitable activities</b>					
Charitable		113,057	34,068	147,125	151,943
Other trading activities	2	93	-	93	104
Investment income	3	1,570	-	1,570	1,231
<b>Total</b>		<u>138,613</u>	<u>34,068</u>	<u>172,681</u>	<u>177,468</u>
<b>EXPENDITURE ON</b>					
<b>Charitable activities</b>					
Charitable		<u>145,211</u>	<u>24,778</u>	<u>169,989</u>	<u>168,717</u>
Net gains/(losses) on investments		<u>(275)</u>	<u>-</u>	<u>(275)</u>	<u>(410)</u>
<b>NET INCOME/(EXPENDITURE)</b>		<u>(6,873)</u>	<u>9,290</u>	<u>2,417</u>	<u>8,341</u>
<b>RECONCILIATION OF FUNDS</b>					
Total funds brought forward		360,106	107,681	467,787	459,446
<b>TOTAL FUNDS CARRIED FORWARD</b>		<u><u>353,233</u></u>	<u><u>116,971</u></u>	<u><u>470,204</u></u>	<u><u>467,787</u></u>

The notes form part of these financial statements

**Morley Elderly Action**

**Balance Sheet  
31 March 2025**

	Notes	Unrestricted fund £	Restricted funds £	2025 Total funds £	2024 Total funds £
<b>FIXED ASSETS</b>					
Tangible assets	7	125,967	96,980	222,947	226,167
<b>CURRENT ASSETS</b>					
Investments	8	22,317	-	22,317	22,592
Cash at bank and in hand		208,158	19,991	228,149	223,135
		<u>230,475</u>	<u>19,991</u>	<u>250,466</u>	<u>245,727</u>
<b>CREDITORS</b>					
Amounts falling due within one year	9	(3,209)	-	(3,209)	(4,107)
<b>NET CURRENT ASSETS</b>		<u>227,266</u>	<u>19,991</u>	<u>247,257</u>	<u>241,620</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<u>353,233</u>	<u>116,971</u>	<u>470,204</u>	<u>467,787</u>
<b>NET ASSETS</b>		<u><u>353,233</u></u>	<u><u>116,971</u></u>	<u><u>470,204</u></u>	<u><u>467,787</u></u>
<b>FUNDS</b>	10				
Unrestricted funds				353,233	360,106
Restricted funds				116,971	107,681
<b>TOTAL FUNDS</b>				<u><u>470,204</u></u>	<u><u>467,787</u></u>

The financial statements were approved by the Board of Trustees and authorised for issue on 16/6/25 and were signed on its behalf by:

  
S Twohey - Trustee

The notes form part of these financial statements

## Morley Elderly Action

### Notes to the Financial Statements for the Year Ended 31 March 2025

#### 1. ACCOUNTING POLICIES

##### Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

##### Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

##### Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

##### Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Freehold property	- 1% straight line
Fixtures and fittings	- 15% reducing balance
Computer equipment	- 33% reducing balance

##### Taxation

The charity is exempt from tax on its charitable activities.

##### Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

##### Pension costs and other post-retirement benefits

The charity operates a defined contribution pension scheme. Contributions payable to the charity's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

#### 2. OTHER TRADING ACTIVITIES

	2025	2024
	£	£
Other trading activities	93	104
	<u>          </u>	<u>          </u>



**Morley Elderly Action**

**Notes to the Financial Statements - continued  
for the Year Ended 31 March 2025**

**3. INVESTMENT INCOME**

	2025	2024
	£	£
Investments	1,247	1,185
Interest receivable	323	46
	<u>1,570</u>	<u>1,231</u>

**4. TRUSTEES' REMUNERATION AND BENEFITS**

There were no trustees' remuneration or other benefits for the year ended 31 March 2025 nor for the year ended 31 March 2024.

**Trustees' expenses**

There were no trustees' expenses paid for the year ended 31 March 2025 nor for the year ended 31 March 2024.

**5. STAFF COSTS**

	2025	2024
	£	£
Wages and salaries	90,148	93,563
Social security costs	2,893	3,473
Other pension costs	2,001	2,008
	<u>95,042</u>	<u>99,044</u>

The average monthly number of employees during the year was as follows:

	2025	2024
	5	5
Employees	<u>5</u>	<u>5</u>

No employees received emoluments in excess of £60,000.

**6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES**

	Unrestricted fund £	Restricted funds £	Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>			
Donations and legacies	24,190	-	24,190
<b>Charitable activities</b>			
Charitable	131,306	20,637	151,943
Other trading activities	104	-	104
Investment income	1,231	-	1,231
<b>Total</b>	<u>156,831</u>	<u>20,637</u>	<u>177,468</u>
<b>EXPENDITURE ON</b>			
<b>Charitable activities</b>			
Charitable	150,390	18,327	168,717
Net gains/(losses) on investments	<u>(410)</u>	<u>-</u>	<u>(410)</u>
<b>NET INCOME</b>	6,031	2,310	8,341

**Morley Elderly Action**

**Notes to the Financial Statements - continued  
for the Year Ended 31 March 2025**

**6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES - continued**

	Unrestricted fund £	Restricted funds £	Total funds £
<b>RECONCILIATION OF FUNDS</b>			
Total funds brought forward	354,075	105,371	459,446
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u>360,106</u>	<u>107,681</u>	<u>467,787</u>

**7. TANGIBLE FIXED ASSETS**

	Freehold property £	Fixtures and fittings £	Computer equipment £	Totals £
<b>COST</b>				
At 1 April 2024	231,029	7,897	20,044	258,970
Additions	-	1,195	-	1,195
At 31 March 2025	<u>231,029</u>	<u>9,092</u>	<u>20,044</u>	<u>260,165</u>
<b>DEPRECIATION</b>				
At 1 April 2024	11,314	5,502	15,987	32,803
Charge for year	2,310	541	1,564	4,415
At 31 March 2025	<u>13,624</u>	<u>6,043</u>	<u>17,551</u>	<u>37,218</u>
<b>NET BOOK VALUE</b>				
At 31 March 2025	<u>217,405</u>	<u>3,049</u>	<u>2,493</u>	<u>222,947</u>
At 31 March 2024	<u>219,715</u>	<u>2,395</u>	<u>4,057</u>	<u>226,167</u>

**8. CURRENT ASSET INVESTMENTS**

	2025 £	2024 £
Listed investments	<u>22,317</u>	<u>22,592</u>

**Morley Elderly Action**

**Notes to the Financial Statements - continued  
for the Year Ended 31 March 2025**

**9. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	2025	2024
	£	£
Social security and other taxes	1,473	2,394
Pension creditor	349	390
Accruals and deferred income	1,387	1,323
	<u>3,209</u>	<u>4,107</u>

**10. MOVEMENT IN FUNDS**

	At 1.4.24	Net movement in funds	At 31.3.25
	£	£	£
<b>Unrestricted funds</b>			
General fund	360,106	(6,873)	353,233
<b>Restricted funds</b>			
Gardening	4,620	11,600	16,220
Furniture	1,866	-	1,866
Property Acquisition Grants	96,229	(2,310)	93,919
Winter Fund	3,114	-	3,114
Winter Warmth	1,852	-	1,852
	<u>107,681</u>	<u>9,290</u>	<u>116,971</u>
<b>TOTAL FUNDS</b>	<u>467,787</u>	<u>2,417</u>	<u>470,204</u>

Net movement in funds, included in the above are as follows:

	Incoming resources	Resources expended	Gains and losses	Movement in funds
	£	£	£	£
<b>Unrestricted funds</b>				
General fund	138,613	(145,211)	(275)	(6,873)
<b>Restricted funds</b>				
Gardening	34,068	(22,468)	-	11,600
Property Acquisition Grants	-	(2,310)	-	(2,310)
	<u>34,068</u>	<u>(24,778)</u>	<u>-</u>	<u>9,290</u>
<b>TOTAL FUNDS</b>	<u>172,681</u>	<u>(169,989)</u>	<u>(275)</u>	<u>2,417</u>

**Morley Elderly Action**

**Notes to the Financial Statements - continued  
for the Year Ended 31 March 2025**

**10. MOVEMENT IN FUNDS - continued**

Comparatives for movement in funds

	At 1.4.23 £	Net movement in funds £	At 31.3.24 £
<b>Unrestricted funds</b>			
General fund	354,075	6,031	360,106
<b>Restricted funds</b>			
Gardening	-	4,620	4,620
Furniture	1,866	-	1,866
Property Acquisition Grants	98,539	(2,310)	96,229
Winter Fund	3,114	-	3,114
Winter Warmth	1,852	-	1,852
	<u>105,371</u>	<u>2,310</u>	<u>107,681</u>
<b>TOTAL FUNDS</b>	<u>459,446</u>	<u>8,341</u>	<u>467,787</u>

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Gains and losses £	Movement in funds £
<b>Unrestricted funds</b>				
General fund	156,831	(150,390)	(410)	6,031
<b>Restricted funds</b>				
Gardening	20,637	(16,017)	-	4,620
Property Acquisition Grants	-	(2,310)	-	(2,310)
	<u>20,637</u>	<u>(18,327)</u>	<u>-</u>	<u>2,310</u>
<b>TOTAL FUNDS</b>	<u>177,468</u>	<u>(168,717)</u>	<u>(410)</u>	<u>8,341</u>

**11. RELATED PARTY DISCLOSURES**

There were no related party transactions for the year ended 31 March 2025 nor for the year ended 31 March 2024.

**Morley Elderly Action**

**Detailed Statement of Financial Activities  
for the Year Ended 31 March 2025**

	2025 £	2024 £
<b>INCOME AND ENDOWMENTS</b>		
<b>Donations and legacies</b>		
Donations	23,893	24,190
<b>Other trading activities</b>		
Other trading activities	93	104
<b>Investment income</b>		
Investments	1,247	1,185
Interest receivable	323	46
	<hr/> 1,570	<hr/> 1,231
<b>Charitable activities</b>		
Leeds City Council	126,119	144,167
Grants	21,006	7,776
	<hr/> 147,125	<hr/> 151,943
<b>Total incoming resources</b>	<hr/> 172,681	<hr/> 177,468
<b>EXPENDITURE</b>		
<b>Charitable activities</b>		
Wages	90,148	93,563
Social security	2,893	3,473
Pensions	2,001	2,008
Rates and water	1,940	2,113
Insurance	1,997	1,850
Light and heat	5,596	2,958
Telephone	3,293	3,238
Postage and stationery	3,169	5,973
Advertising	-	485
Sundries	4,592	6,258
Waste disposal	1,537	1,439
Computer costs	2,882	1,812
Travel & volunteer expenses	3,727	5,724
Training & subscriptions	1,164	159
Event costs	2,415	5,913
Gardening	22,468	16,017
Depreciation	4,415	4,316
Legal Fees	-	539
	<hr/> 154,237	<hr/> 157,838
<b>Support costs</b>		
<b>Management</b>		
Repairs & renewals	12,619	8,215
<b>Finance</b>		
Bank charges	337	333

This page does not form part of the statutory financial statements

**Morley Elderly Action**

**Detailed Statement of Financial Activities  
for the Year Ended 31 March 2025**

	2025 £	2024 £
<b>Finance</b>		
<b>Governance costs</b>		
Accountancy and legal fees	2,796	2,331
	<hr/>	<hr/>
Total resources expended	169,989	168,717
	<hr/>	<hr/>
<b>Net income before gains and losses</b>	2,692	8,751
	<hr/>	<hr/>
<b>Realised recognised gains and losses</b>		
Realised gains/(losses) on fixed asset investments	(275)	(410)
	<hr/>	<hr/>
<b>Net income</b>	<u>2,417</u>	<u>8,341</u>

This page does not form part of the statutory financial statements