



FINANCIAL STATEMENTS

FOR THE YEAR ENDED

31st MARCH 2023

COMPANY NUMBER: 04146495

CHARITY NUMBER: 1085300

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SOUTHWARK CARERS
DIRECTORS REPORT
FOR THE YEAR ENDED 31st MARCH 2023

The Directors are pleased to present their report together with the financial statements for the charity for the year ended 31st March 2023. The financial statements comply with current statutory requirements, the memorandum and articles of association and the 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 (FRS102) (effective 1 January 2015).

REFERENCE AND ADMINISTRATION DETAILS OF THE CHARITY ITS DIRECTORS AND ADVISERS

Directors (who are also the Charity's Trustees) who served during the period to the date of approval of the financial statements were:

Wondwossen Befikadu Kebede

Mary Jacob

Dorah Naisubi

Gwendoline Rebecca Yvonne Najair Bellinfante

Fiona Thompson

Treasurer

Chair

Chief Officer & Company Secretary

Verinder Mander

Registered Address:

Southwark Carers

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The Co-operative Bank

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Independent examiners:

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SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

CHAIR'S REPORT 2023

The last year was an incredibly tough year for Southwark Carers, all our service users and their families from a financial and health perspective. Covid restrictions were lifted but the impact of Covid continued. Given the changing economic, cost of living crisis and health climate, the changes in benefit payments and the pressures on local authorities and the NHS, has seen the staff and volunteers at Southwark Carers under enormous pressure.

Throughout this period the staff and volunteers have worked closely together to maintain stability and to ensure that there was a smooth service operating. Whilst explaining to clients that services they had previously received by local government, NHS and ourselves were not available due funding shortages, COVID-19 and redefining priorities.

The team have strived to achieve targets set and with dedication and fortitude they have managed to be successful in their endeavours, and during this extraordinarily difficult time far exceeded expectations. This has been done against reduced resources to provide services for carers.

The burden of caring does not rest with just one member of a family or friendship network, it extends to all members of the family and friendship groups. We have spread the work throughout the team. We have opened up all our events to all unpaid carers and their cared for. This has enabled us extend our reach into the community and spread our key message that Carers have a right to a life of their own.

On a positive note we continued to promote our relationship with Carefree Breaks and were able to offer carers opportunities to sign up for breaks, in under utilised hotel accommodation. These have proved very popular and have allowed carers to look forward to respite, and society was able to operate fully again after Covid-19 restrictions were lifted.

We further developed our working relationship with Fareshare a food redistribution charity, this was developed further into a weekly food distribution. This alleviated the pressures of the cost of living crisis. This allowed us to create food packages for carers in need, those having to shield with their cared for, those who had to isolate and where they could not access food deliveries, or did not have the financial resources to do so. We were also provided with Covid safety kits for carers to use when looking after loved ones.

On behalf of the Board I would like to thank all our staff, volunteers and members for their on-going support, especially through this most challenging of years.

The Board and I will strive to improve services for carers and our reach into the community so that we identify and support all carers.

SOUTHWARK CARERS
DIRECTORS REPORT
FOR THE YEAR ENDED 31st MARCH 2023

STRUCTURE, GOVERNANCE AND MANAGEMENT

Southwark Carers is a company limited by guarantee (each member having a liability of £1) and a registered charity.

The policies of the charity are determined by the board, whose membership is listed on page 1.

Appointment to Board

The charity is governed by a board of directors (the management committee) which meets quarterly. During this period all our Board meetings were moved onto Zoom. Directors are appointed by the board and serve for one year after which period they may put themselves up for re-election at the Annual General Meeting as prescribed in the Articles of Association. Officers are nominated by members and elected annually. The board has the power to co-opt up to five non-voting members. At its quarterly meetings, the board agrees the overarching strategies and activities of the charity, including information, communications, fundraising activities, reserves policies and risk management.

Directors are elected to the board annually from members who have registered with the charity and been nominated by two other members. The induction process for any new directors comprises initial meetings with the chair, existing directors and the chief executive. New directors are provided with an induction pack, which comprises a range of background information on the charity's history and recent activities and includes a copy of the Memorandum and Articles of Association, minutes of recent board meetings, recent accounts and a copy of the Charities Commission guidance documents for directors. On-going training to directors is provided as required through meetings, away days and courses. Directors are invited to attend all events that Southwark Carers hosts.

Throughout the year, the board continued to work to review and develop Southwark Carers and its services. The majority of the board, who give their time voluntarily, are carers, or former carers. Both the board and the staff work together to deliver support services for carers and to consult with them about their needs, when developing and planning future services and events.

Statement of Directors Responsibilities

The directors are responsible for preparing the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law and the law applicable to charities in England and Wales requires the directors to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of its incoming resources and application of resources, including its income and expenditure, for that period. In preparing these financial statements the directors are required to:

- select suitable accounting policies and consistently apply them;
- observe the methods and principles of the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards, have been followed subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to assume that the charity will continue to operate

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

The directors are responsible for keeping proper accounting records, which disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Companies Act 2006 and the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities. The directors confirm that, in the case of each of the persons who are directors at the date of this report, the following applies:

- so far as each director is aware there is no relevant audit information (information needed by the Charity's auditors in connection with preparing their report) of which the Charity's auditors are unaware; and
- each director has taken all the steps that he or she ought to have taken as a director in order to make herself/himself aware of any relevant audit information and to establish that the Charity's auditors are aware of that information.

Remuneration Policy

Southwark Carers has a remuneration policy which sets out how all staff remuneration is set. The Directors review the policy and agree all increases in salary, including any cost of living increases, and approve any benefits for the staff team. Salary levels are set after an assessment of job descriptions and person specifications followed by a bench marking exercise that assesses pay rates and benefits associated with that type of role in the voluntary sector. As a minimum standard all staff are paid the London Living Wage and we are accredited members of the Living Wage Foundation.

Risk Management

The directors have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error.

The charity is subject to review and audit by many bodies in respect of its company status, its charitable status and by its funding bodies. The board considers periodically the major risks to which the charity is exposed and has developed documented controls to mitigate those risks. Significant external risks to funding face all charities and Southwark Carers maintains a detailed business plan with regard to funding and its activities. Internal risks are minimised by internal control procedures covering all transactions.

These procedures are reviewed to ensure they meet the growing needs of the charity. During 2022/23 the charity continued to review and audit its practices to ensure the highest standards are maintained.

OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT

The Directors have complied with the duty in section 17(5) of the Charities Act 2011 and referred to the guidance on public benefit published by the Charity Commission when reviewing the charity's aims and objectives and in planning its future activities.

The main object of the charity as defined in the memorandum and articles of association is:

"To alleviate the conditions of life of carers in necessitous circumstances, who care for the elderly, sick, disabled, mentally ill or otherwise infirm, by any means that is charitable".

Our Vision – all carers in Southwark will have access to the practical and emotional support they need and the recognition and influence they deserve.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

Our Mission – to be an organisation run by and for carers, which provides practical and emotional support to increasing numbers of carers from the diverse communities of Southwark, and to obtain recognition of their invaluable contribution and influence policy in their interests.

Our Aims are to turn this vision and mission into a practical reality for carers across Southwark. We describe our aims under nine headings:

1. Services - to have a range of services accessible to carers across Southwark so that they are supported in all areas of need;
2. Communication - to communicate clearly with a range of people so that they are aware of our organisation and the needs of carers;
3. Representation - to be a voice for carers and to speak up for them at the places where decisions are made about them;
4. Campaigning - to put forward publicly the needs that carers have and to encourage and empower carers to speak up for themselves;
5. Partnerships - to connect with and support other organisations that can help us deliver our work, or who work with carers;
6. Governance – to be a well governed and managed organisation, so that everyone can have confidence in the things we do;
7. Quality - to deliver all of our services and activities within agreed standards, to make sure that they are the best they can be;
8. Resources - to have the appropriate level of resources available, so that we have what we need in order to deliver to carers; and
9. Development - to research new and better ways of working to make sure we continue to develop to meet the needs of carers.

Our Activities are organised under the following headings:

- Reducing Social Isolation
- Advice Information and Support
- Advocacy
- Outreach
- Emotional Welfare
- Health and Well Being
- Identifying Hidden Carers
- Financial Support
- Food Parcels

ACHIEVEMENTS AND PERFORMANCE

REDUCING SOCIAL ISOLATION

We run a number of activities. These provide a life line for some carers, “the group is so valuable because it allows carers to connect”, in a friendly safe non- judgmental environment, where their peers can empathise, and understand their issues and concerns, as well as provide them with emotional and practical peer support from their own personal experiences. Carers found once they had got to grips with the technology, that they would pop in and out of Carers Café online as it allowed them to access support from home. Therefore, they had no anxieties about leaving their cared for.

These groups provide carers with a much needed respite break from their caring role for a short time. The groups also allow carers to form new friendships and social networks. This social interaction amongst carers is vital as we know that addressing social isolation is a key concern for carers, whose friendships and networks

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

of support are worn away by their caring role. Research by Newcastle University published on 15th August 2017 showed 8 out of 10 carers have felt lonely or socially isolated as a result of their caring role.

Although, not all our carers can access our workshops, social events, parties, information days and other activities, they are all informed via email, text, website, and targeted phone calls. This information on our activities and support available is shared with 4000 carers.

Monthly Groups

Our groups provide an opportunity for carers to drop in and learn a new skill, whilst relaxing and to rebuild social networks.

Film Club

Film Club this runs twice a month and is followed by a peer support session where carers can reflect on their experiences and share ideas. There were 17 sessions and 58 attendees. This was moved to Zoom and was a lifeline for a number of carers. The move to Zoom was vital during the Covid-19 pandemic. This has proved so popular that we continued with the zoom sessions as attendance was greater than in person sessions.

Book club

We held regular sessions of our book club, the book club met on 6 occasions and had 21 attendees. The book club varied its discussions around cultural issues by looking at recipe books.

Online groups

Mindfulness Group moved online.

The following groups Healthy Eating, Knitting and nattering, Salsa, Sewing, Painting and Jewellery making groups, now form part of the Carers café.

Healthy Eating group

We received funding to create a roof garden and to hold healthy eating work shops. We held 5 workshops and has 42 attendees. The attendees were also supported with one on one support to identify products that might ease their health conditions.

IT Group

As a result of specific requests from Carers we have created a one to one Carers IT support sessions. It was found that with group sessions there was a mismatch in skills and knowledge. The one-to-one sessions work more effectively in developing IT skills and improving carers knowledge base. We have worked with 11 carers. This work was carried out over the phone, Zoom, and in face to sessions.

Carers Cafe

Carers Café we held 2 online and 5 (total) in person, the attendance was 68 (total) at the in the person event. We have framed our monthly Carers Cafes around different key issues. For example, we have had discussions on vaccination, the impact of social isolation on carers and the need for shielding and its impact

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

on carers. We have also looked at the over prescribing of medicines. We held culturally diverse cafes, a Black History Café and various sing-a-longs. This allows a cultural exchange and ensures that the diversity of Southwark is celebrated. An additional Carers Café was held in Carers Week and on Carers Rights Day.

At the Christmas Party, which is also had a Carers Café event, there were over 42 attendees on Zoom, this year to ensure fairness and equality of opportunity every carer registered with the service was entered in the Christmas raffle requests for raffle tickets. We had a number of singers attend the Zoom session, a Christmas Carol sing-a - long, jokes being told by Young Carers, and a dance along. The entertainment provided a great opportunity for Carers to unwind and relax. There was a raffle with over 100 prizes.

We received funding to create a warm hub during the winter. This allowed us to provide us a warm space for carers to come, stay and be refreshed. This was an extension of our carers café and met on 19 occasions and had 291 attendees.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

INFORMATION and SUPPORT

Advice Service

The service provides information on welfare rights matters, and benefit issues. It helps with accessing other services in Southwark and helps in finding services to promote well-being. This service was moved to a telephone service, drop off and zoom service. Post Covid we were able to resume working as we had previously with face to face and telephone and home visits. However, the creative ways of working with Covid continued we used zoom, Microsoft meetings to complete forms and support carers.

In this year the Advice and information Service provided 18379 sessions.

We record the details of every carer that we speak to. The types of support we provided were:

- Health and social care services including referrals to social services, complaints against social services and liaising with the carer and social services by attending joint meetings;
- Health and wellbeing, including advising about emotional support services, positive thinking services, or referral to these services;
- Housing and Adaptations including helping carers to negotiate with Southwark Council to move house more quickly or completing medical report forms. We also try to sort out disputes between the carer and landlords, by writing letters on their behalf.
- Breaks from caring and finding other ways of providing the carers with holidays/respite.

Advocacy Service

The Advocacy Service provides support in dealing with social, health or housing services and problems that carers might face, in accessing services for themselves or the person they care for. The Advocacy Service aims to promote carers views and protect carers rights by letting their voice be heard.

The Advocacy Service saw 50 carers. Included within the provision of advocacy is:

- Health and social care, including going with carers to Microsoft teams meetings with social services. This is mostly with carers, who do not understand the meetings or what the implications or outcomes are;
- Money and benefits advice and support; and
- Housing and adaptations, including going to meetings with the carer, writing letters to the council on their behalf and appealing housing decisions.

Information Services

Southwark Carers provides an integrated set of information services, which aims to provide useful and accessible information direct to carers, staff and professionals, to enable them to support and value carers.

An Information pack is online for all carers to access. It contains a range of advice and contact details for further assistance.

All Carers have been given a plethora of information about the medical conditions of their cared for. Where the diagnosis is recent we will highlight where information can be sought about the condition and also help the carer to understand the condition. In providing information on specific conditions we are very careful not to stigmatise any one condition or increase fears of carers. However, usually, most carers are 'experts' on the medical conditions of their cared for, they are experts by experience as they advocate on their cared for's behalf, attend Doctors appointments, administer medication. Often, the cared for's condition is only likely to deteriorate and therefore support can sometimes seem futile, as the caring burden will only increase with time.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

The Website includes the latest news for carers, and details of upcoming events. There is also an area for professionals, to provide them with more information on supporting the carers. In the last year we had 30006 unique visitors to our website. They accessed the site on 48,326 occasions.

We have 2229 followers on Twitter.

We use social media tools including Facebook and WhatsApp groups to share information.

As part of Southwark carers information and advice service we offer home visits to the most vulnerable clients who are unable to access our services in the community and in our office. Home visits are vital for the particularly vulnerable and for those caring for someone with multiple needs where the carer is not accessing any respite or support.

Case study AB

AB was referred to us by their G.P. practice through a social prescriber. A is 75 years of age and is the primary carer for their partner who is also in their seventies and was recently diagnosed with dementia. AB was working until covid hit, the couple lived off their private pensions which was topped up by the state pension.

After the initial telephone call by Southwark carers, priorities were financial, a home visit was in the best interest of A, especially as they were unable to leave their home and loved one, AB felt daunted and embarrassed as they had never claimed benefits before. They had spent all their savings and were receiving no benefits. They lived in a council property and were paying full rent and council tax which was partly paid from their credit card.

On the home visit we took an Attendance Allowance form to apply for this benefit. In the benefit check A would be entitled to a reduction in rent and council tax as well as Attendance Allowance. A was surprised as they did use an online benefit calculator and it stated they were not entitled to benefits as they were over the threshold. Another home visit appointment was made to put in a claim for rent and council tax which was made online.

Further investigation we provided support with contacting their energy suppliers for advice and help with a grant and reduced rates with a payment plan.

A Southwark carers emergency plan was put in place for them that became the first point of call for all information when needed. Including, a message in the bottle that is part of the emergency plan which is kept in the fridge for emergency services to find.

Information was given on activities and support for the cared for in Southwark as well as the cost-of-living crises booklet by Southwark Council.

Outcomes financially: £1,000 repayment of rent and is better off £80.00 a week. Their credit card has been cleared and there is no debt outstanding.

Without home visits this carer would not have received the support and benefits they were entitled to.

Our information and advice service also supports carers through end of life care and after a bereavement.

Case Study X and Y

Southwark Carers have been supportive of X with many underlying health issues and her adult child Y.

X was born in the 1950's and suffers from a range of serious health conditions which include heart problems, kidney failure, arthritis and walking difficulties

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

Y was born in the 1980's and is blind, has learning disabilities and Asthma

There have been issues with her Housing Association regarding her housing disrepair mainly leakage from the kitchen ceiling, mice infestation and being chronically overcrowded living in a one bed flat.

Due to extreme poverty both X and Y have been surviving without a working fridge and cooker that barely works. Food items were kept in boxes which had water leakage from the ceiling that had seeped through damaging the contents. At one point X had suffered from food poisoning resulting in admission to hospital. On being contacted Southwark carers recognised the distress and anguish of the carer and set about finding practical solutions to help.

As part of our services, Southwark carers have been providing X with emotional support, Southwark Carers runs an essential emergency food parcel service which X as a vulnerable older, carer dips into from time-to-time, on many occasions this service ensured both X and her adult child Y ate healthy and balanced food. Southwark carers also provided X and Y a winter bag containing a warm blanket, scarf, socks and informative details on how to keep warm and energy efficiency advise.

The carer was supported to complete a change of circumstances form. Southwark carers completed a housing application form for a two-bed property from The Metropolitan Thames Valley Housing Association. Still awaiting housing decision.

Completed two PIP application forms for X and her adult child Y. Y received enhanced rate mobility and daily living.

Requested a Carers Assessment (as a result only given one day respite).

Filled out an application form from Connect for Help for a fridge-freezer and electric cooker. This was successful and fridge freezer and electric cooker installed.

Completed London Fire Brigade application form for home assessment and received a home visit from the London Fire Brigade to have fire alarms fitted.

Case study C

C is in her forties and has been registered with Southwark carers since 2015, as the primary carer to her husband, of 84 years of age. C visited the office to update us on the recent bereavement of her husband. She has no family and has her own physical and mental health needs that have been ignored, due to her caring role.

C was not computer literate and had a basic understanding of the workings of her mobile phone. There are no savings and no funeral plan. She spoke of having to bury her husband with a pauper's funeral. She did not know the process and procedures of how to arrange his funeral.

The only income she had was her carers allowance, which was to be stopped. She had no other means of income or savings. Southwark carers intervention was to look at her finances, practical and emotional needs. We drew up a plan together of the priorities for her picking up husband death certificate. Registering his death to different organisations.

We went through her financial plan and issues. She was given information on other organisation and support agencies in Southwark if she needed them.

We started her claim online for Universal Credit and an appointment was made for an interview.

Over the phone we put in a claim for the Bereavement Support Allowance. We accompanied her to the

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

chosen funeral parlour and a social fund bereavement application was filled out and posted with the bill of the cost for the funeral.

We accompanied her on her second visit to the Job Centre where her UC claim was processed. Emotional support was given by Southwark carers, to manage her grief. With time C was able to move forward with her life as she wanted to prepare for work, we supported her into voluntary work locally. Southwark carers arranged mock interviews to help the carer gain confidence. She signed up to a beginners IT course. We helped put her CV together and referred her to Smart Works they provided C with a complete outfit and workshops to support her getting back into work. Information on local organisations was also given.

Outcomes, she received her Bereavement Support Allowance and Universal Credit. All the funeral cost were paid by the social fund bereavement payment. She started to attend her health appointments to look after herself. We supported her to plan her finances to pay off outstanding debts and bills. C found a job that gave her focus and a purpose. She became enthusiastic with life and started to look towards a future.

OUTREACH ACTIVITIES

We used Zoom and Microsoft Teams to carry outreach activities. The purpose of this new way of working was to hold regular information, advice and support sessions. To market the innovative ways that we were working during Covid-19.

EMOTIONAL SUPPORT

Our emotional support sessions, we provided 1196 sessions (with 373 carers). We provide carers with a listening ear and coping strategies, so that they can cope with the hurdles that they face in day-to-day life. Sessions are provided on a weekly basis as carers needs require.

COUNSELLING

We received funding from St George The Martyr to provide counselling to carers, this service was designed to deal with the pandemic and its impact on carers.

Whilst we had anticipated a high level of need we didn't envisage the numbers that would be accessing our services. This reflective of the impact of the pandemic and an inability to access services, especially mental health, counselling and coping strategies. The number of people accessing the service highlights the need for this valuable intervention.

410 Carers were supported through this service. The over subscription of this service allowed us to access additional funds from the Surrey Dispensary Grant.

1. RJ Case Study

RJ works full time and was the primary carer for his wife until the loss of his wife, due to a terminal illness. He thinks he hasn't had time to grieve as after his wife died, he tried to carry on as normal and then found he was isolating himself. He is feeling low and sad as he spoke about bottling up all his feelings. Explored his feelings of grief and explained the process to help normalise those feelings. Discussed different strategies to help with his grief and mindfulness.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

He is not feeling so low as he felt that talking therapies have helped him. He spoke about how he felt when his wife died. He is now able to communicate his feelings to his family which is something he has never done before and now has their support. He spoke about feeling sad and how he shut himself away for a long time from other people. Helped to normalise some of his feelings of grief and spoke about getting a life balance and putting strategies in place and feel good practices, including looking into some hobbies.

RJ is feeling better and is feeling more hopeful as he can see a massive improvement to how he was feeling. He is reflecting more and not trying to do everything himself. He spoke about his wife as it's her birthday soon and how he will be putting strategies in place for it to be a sad but more positive experience. He spoke about his personal issues and fears and the feeling that his head was being crushed, but now his head is much clearer. He is now acknowledging his feelings and looking after himself and is getting more of a life balance of doing one thing at a time. I made some interpretations. I listened. I reflected back the difficult place that he had come from to seeing the light at the end of the tunnel instead of his feelings of desperation.

2. SS Case Study

SS is in her forties and is the primary carer for her mother who is bedridden and cares for her father too. She has suffered mental health due to the death of family members, friends, and the stress of working full time, and the pressure of her caring responsibilities. She feels consumed by her emotions of grief by the loss of her brother and sister. Work issues also played a dominant role due to a death of a close friend at work whom she had known for many years and who was a confidant.

Discussed the grief process writing down her feelings walking and being out and breathing exercises. Spoke about writing a letter to her brother as she did not get a chance to say goodbye as she was told over the phone that he had passed away. Discussed difficult feelings and planting a tree in her brother's memory. She spoke about her loss, I listened.

SS has many days where she is feeling stressed, angry, and overwhelmed with sadness and loss. Work was also becoming stressful, and causing anxiety. This was manifesting in physical symptoms such as having headaches and her body is tight and taunt with tension and stress.

We discussed work life balance. How this could be implemented. Mindfulness breathing and strategies to use on a daily basis. We explored her options, choices and the future. We explored her anger and understanding the process of grief, putting in place a number of different strategies for her to have an outlet for her anger and frustration.

She took some annual leave and used that time to go out with friends, walking, talking and tried yoga for the first time. She is putting in mindfulness and breathing strategies and found the relaxation exercises helped with her headaches and stress. She is feeling better as she is more aware of her feelings and allowing herself to grieve properly.

SS has started to put her health and wellbeing as a priority instead of neglecting her needs and putting others first. She has recently stated to look forward to the future in a more positive way and has signed up for training courses, making changes that benefit her emotional wellbeing. She is decorating her home and is finally opening many of the boxes she has had closed and in storage when she moved in her home many years ago.

3. Case Study S

S cares for her elderly mother who lives alone and is in the early stages of dementia. Although S has four siblings living in the area, she is the sole carer for her mother combining care with a part time job.

S was overwhelmed and suffering from anxiety and exhaustion when she contacted Southwark Carers a few

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

months ago requesting support with filling in a form and said that she didn't want to continue caring for her mother. When invited to join our online activities to take a break from caring she responded angrily that she didn't have time.

S instantly agreed to an offer of six sessions of counselling and Mindfulness relaxation sessions with the view of extending the course if necessary. She has had twelve sessions and we are continuing to work together at present.

During these sessions S has been very open about the issues affecting her and her relationship with her cared for and extended family. The main emerging issues have been huge anger and resentment towards her mother and family dynamics.

S is the youngest of six children from a family of BAME background and like all her siblings she was born in England. She is intelligent and because she doesn't consider herself a beauty, she gives her physical appearance a great deal of care, attention and importance. She is also accomplished and successful in her career.

S described her mother as selfish, uncaring and manipulative. She justified her resentment towards her explaining how due to her personality and attitudes S and her needs have always been overlooked or quashed throughout her life. She disclosed the importance her mother gives to looks, skin colour and gender which meant that she has favoured her lighter coloured children always showering praise, attention and appreciation on her sons and her whiter daughters while ignoring S's lifetime devotion, service and loyalty. Our sessions revealed that amongst many, the three biggest issues S is holding against her mother are her determination to hold her back as a young promising athlete, her refusal to support and protect her when still very young she decided to marry an unsuitable man, and her inability to defend her when things got ugly with her siblings. S discussed how these actions have left her with lasting damaging effects including lack of confidence, unhappiness with her life as a childless divorcee living alone with a dog who is now sick and dying of old age and being estranged from her siblings. She feels like an outsider in her own family and fears the isolation when her mother and her dog die. S also resents having to care for her mother when according to her she didn't receive any care or support from her.

Questions have revealed a deep need of validation, acceptance and connection with her mother, and S was on a quest for her mother's acknowledgement and explanation of her conduct, and she was seeking apologies for her mother's treatment of her.

Our work has been centred on loss, anger and relationship dynamics. Through this S has been able to see how her angry, defensive and confrontational approach when seeking answers from her mother was getting in the way of a productive, honest and open conversation which was holding her back from achieving her goals.

Anger as a useful feeling has been discussed and explored as well as the need to express and channel it into more constructive objectives. Subsequently acknowledged and fear of loss of both her mother and her dog has also surfaced and been explored as has S's fear of the future without her caring role.

Through these sessions in which many topics including culture, age, religion, family attitudes and beliefs, individual personal experiences, historic events, role models, education, social class and historic period have been discussed, S has been able to see her mother's actions and attitudes from a more open perspective. As a result, her approach to her sessions has taken a tone of curiosity and willingness to learn and understand the root of her mother actions. This has led S to see her mother with some empathy and compassion, subsequently greatly improving their relationship and bringing them closer. Although still grieving her losses S has is finding her answers and getting the apologies as her mother gradually expresses her regrets. Recently S lamented the waste of time resenting her mother in our session and stated that from now on her focus will be to make every minute count creating positive memories with her and her dog.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

Through her Mindfulness sessions S has become more present and aware of her feelings and reactions and consequently more able to see what changes she needs to make. Having learnt to use breathing as a coping strategy she reports feeling overall calmer, less anxious, more focused and more grounded. Seeing how beneficial the sessions are, she has now implemented Mindfulness relaxation exercises in her daily routine for longer or shorter periods of time depending on time and is applying this to aid sleep. These strategies have also supported S when challenges arise with her mother.

Discussing what S wants for herself in the future she has decided that she will move to a seaside town which has been a dream for a long time and will start a new life while perhaps starting to build bridges with at least two of her siblings.

Over the last few sessions S has repeatedly expressed her immense appreciation and gratitude for our service articulating how much this intervention has changed her life, and by extension the lives of those around her, especially her relationship with her mother. While grieving for her losses and acknowledging her sadness S's resentment for her mother has lessened and she stopped wanting to abandon her. However, S's issues are deep, and we continue to work together in awareness and acknowledgment that hers is going to be a long ongoing journey as her mother's mental and physical health deteriorates bringing new challenges and wakening old grudges. It is one step forward and two steps back at the moment, but S has taken a few significant leaps. After all these dynamics S is also undergoing some serious health issues of her own.

4. Case study C

C is a carer known to Southwark Carers for many years, as she cares for her three young adult children all of whom have special needs. C presented overwhelmed and full of anxiety when she called a few months ago requesting information about an organisation providing specialised support for young people with the type of needs her children have.

C was offered weekly counselling and Mindfulness relaxation sessions when she explained the many difficult issues she was facing. They were practical, financial and mostly emotional.

C had no coping strategies, nothing good going for herself and had faced lockdown with all its challenges on her own. She was on antidepressants and said that she felt trapped and wanted to run away never to come back. She was at the end of her tether. She was neglecting herself, had no energy and felt alone with her incredible caring responsibility.

Delving into her issues C disclosed that her youngest (teenage) child was acting out and her eldest's behaviour was unpredictable. C was also scared. Not long ago her eldest had destroyed many things at home and broken a window in a fit of rage and she had to call the police. Nevertheless, C described herself as a strong, independent and self-sufficient woman but felt that she had lost control and was lost.

C has made incredible progress since starting our sessions. Our early conversations revealed issues of social isolation and depression and core issues of shame, lack of trust, guilt and anger.

After discussing present situation and addressing feelings and thoughts we started to explore family dynamics. During these sessions C started to realise that her own issues of shame, anger, fear and a refusal to accept her children's disabilities were the root issues affecting the family. Not surprisingly she discovered that these issues and her approach to life and her family stemmed from attitudes and behaviours from her community, role models and life experiences.

C's community is judgmental, and they don't accept disabilities, so she was made to feel ashamed of her children. This was having a tremendous impact. C was both being both overprotective and pushy with her children forcing them to be like or better than their peers and holding them back socially. C suffered trauma and abandonment in her early life and this was compounded by further abandonment and betrayal from the father of her children. Having no outlet or coping strategies her anger and frustration were coming out in her interactions and responses with her children. One of C's main concerns was that her teenage child had become

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

angry and refused to talk to her. Because he is the one with the mildest disability, she felt she was losing him. Making matters worse was the children's dynamics between themselves; they were snapping at each other which aggravated their individual issues and impacted the collective whole.

Our work together has consisted in demystifying disability, helping C see her children as individuals with strengths and weaknesses and supporting and encouraging with focus on their abilities while considering their weak points, and equipping them to deal with challenges in their daily life.

We have also worked on coping strategies to help C support herself when stressed or overwhelmed. Mindfulness relaxation and breathing exercises have done wonders. While a little reserved at the beginning C has gradually opened up about her personal issues and history. We have discussed the anger and guilt and she has been able to start to process these outside the family dynamics. A few weeks ago, while addressing her losses C grieved for her young self and reminisced on the bright, happy, fun, free spirit, and aspirational woman who loved making beautiful colourful dresses she used to be. We agreed to unearth at least a part of this old self and she talked about starting over by using some self-care and starting a course on fashion design.

C and I agree that it has been a long journey. As a result of which she finds herself more at peace and in control of her life now. With new confidence she recently gathered the courage to confront her ex-partner about his betrayal and abandonment of his children. She also started to talk about her traumatic experience with her extended family. She said she would have never been able to find her voice if it wasn't for our sessions. Her children stopped acting out and they are having productive conversations. Through these she has got to know them better and is now encouraging and supporting them to achieve their dreams. She has equipped them with practical strategies to deal with challenges and is giving them more freedom. It appears that the children have mentioned her change and she delights in their closeness to her. She says that apart from the occasional problem there is peace and no shouting in the house. C has stopped wanting to run away and stopped caring about what other people say or think about her family and is now focused on her life going forward.

To supplement the counselling service we also provide one to one and Group Mindfulness sessions, these were carried out over Zoom.

HEALTH AND WELL BEING

With our partnership with Fareshare we were able to support vulnerable carers who needed food parcels. We were able to provide 259 food parcels.

Carers United Project

We further developed the work that we had carried out around peer support with the Challenging Behaviour Foundation. This was developed into a two-day workshop that would allow our volunteer carers to provide peer support to all family carers. Thus providing an alternative support mechanism for carers in Southwark giving them the access that they need to emotional and practical support, thus easing the pressures of their caring role.

IDENTIFYING HIDDEN CARERS

It is pertinent to note that a key objective for the charity is to identify hidden carers and to provide them with appropriate support. Another key aim of our service is to raise awareness of carer issues to local health services, such as GP surgeries, local hospitals and clinics. It encourages health services to identify carers as early as possible and provide carer awareness training to health professionals across the borough.

We use innovative methods to spread our message that where an individual is looking after someone who is ill, elderly or frail that they need to recognise that their role is beyond simply that of caring for a loved one,

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

that it is an unpaid role that saves the economy, £162 billion / year as stated by Carers UK, who recognises and publicly acknowledges their role.

SOUTHWARK CARERS
DIRECTORS REPORT
FOR THE YEAR ENDED 31st MARCH 2023

We designed a number of unique marketing materials which were placed at over 42 health settings in Southwark including GP surgeries, pharmacists, libraries and leisure centres. Other tools included identification cards in protective 'oystercard' type wallets and our emergency planning kits. We also provided carers with pill boxes, attached to a key ring so that they would not be without their or their cared for's medication.

We registered 205 new carers to the service, of these 33 were male and 168 female, 4 carers refused to state whether they were male or female. This is reflective of national trends, where the number of female carers is far greater than the number of male carers.

CARERS ASSESSMENTS

In 2015 the Care Act 2014 came into effect. The Care Act enshrined a number of key principles for Carers. The Act was hailed as finally recognising a Carer's right to an independent assessment of their needs. Implementation of the Care Act across the Country has varied. Southwark Council in its implementation of the Care Act decided that the process for carrying out Carers Assessments would be taken back in house and would be carried out by a specialist carers social work team. We referred 51 carers for an assessment and provided information and support around carers to a further 2517 carers.

FINANCIAL SUPPORT

GRANTS

As a result of the changes in funding experienced by us and taking into account the economic and political landscape of social care we continued to work with over 40 grant providers to secure grants for carers. In this financial year we were able to help carers purchase furniture including new beds, mattresses, and chests of drawers, wardrobes. We were also able to assist in the purchase of white goods including fridges, washing machines, and ovens. We also assisted in securing educational equipment for children with additional needs. In total we achieved an additional income of £10,927.75, carers received 33 grant awards.

Case study E

E was born 1980's is the carer

G born on 1930's has mobility issues, suffers from incontinence , diabetes and has communication issues.

E is the sole and Primary carer to G who is exceptionally vulnerable. E lives out of the borough and commutes to Southwark.

The cared for suffers from incontinence and soiled themselves frequently. E had to take the dirty laundry to wash at launderette and at times hand wash clothing. This was a long and arduous process. A washing machine was a basic necessity for this carer but was unaffordable.

Southwark carers made a successful application to have a grant for a washing machine to be installed at the cared home for which made the carers life easier.

OTHER

We have made good progress in achieving our main aims.

Services - please see above where our activities and performance has been set out.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

1. Representation – Southwark Carers has continued to represent the views of about 5300 carers locally. Our staff are key speakers at public events about health and social care and carers, their rights and their needs.

Southwark Carers have regularly attended the All-Party Political Group on Carers at the House of Commons, this has allowed us to represent the views of carers locally and nationally. Furthermore, we have been able to be at the cutting edge of policy developments and decision making.

Locally we have been asked on numerous occasions to represent the views of carers on consultations on local issues, ranging from planning through to the layout and design of local hospitals, local health networks and provision of services for all conditions.

2. Campaigning - we have continued to publicly campaign to put the needs and rights of carers into the wider public realm. We supported Carers Week and Carers Rights Day, and organised our own co-ordinated publicity campaigns, using newspaper advertising, posters and leaflets in health and community buildings, to help people across the community to identify as carers.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2022

3. Partnership Working – during the year we have regularly communicated with or established new working relationships with a range of organisations, to help us in our work, including Community Southwark, COPSINS, Cambridge House, Carers UK, King's College Hospital, SLaM, St Thomas's Hospital and Southwark Resource Centre.

We created a partnership with ADASS, allowing us to participate in a range of innovative Zoom events, including a Festival for Carers.

4. Governance – our Trustees met quarterly throughout the year, on zoom, and continued to consider all the issues relevant to delivering our services, managing staff and developing the organisation in order to continue to serve carers locally and to ensure that we continue to meet the needs of carers.
5. Quality – to ensure that we are able to deliver our services and be an organisation that operates at a consistently high level of quality. Work on Quality Assurance continued work, more specifically on Investors in People and Volunteers accreditation and ISO9001 this is with a view to ensuring that we are continually striving to provide an excellent service.
6. Resources - the Trustees have throughout the year maintained oversight of the financial and practical resources required to ensure that Southwark Carers continues into the future and have taken steps to ensure that we have an appropriate level of staff, financial reserves, and the practical resources for the office and carers centre.
7. Development – throughout the year we have considered different methods of working and the potential for new services that we could offer to carers, in order to support them as best we can. We did bid for funding for new services but were not always successful, however, each application that we did allowed us to develop ideas and look at providing innovative ways of supporting carers.

We will continue to consider new sources of funding to extend and develop more services for carers of all ages, in the year ahead.

RESERVES POLICY

The purpose of the policy is to ensure that Southwark Carers are able to meet their contractual obligations and finance future expansion of the organisation. The Directors have decided to set aside funds not committed or invested in tangible assets. The level of free reserves (excluding restricted funds) is reviewed annually by the directors. The directors consider that the most appropriate level of free reserves should be between £82,000 and £164,000 3 months running costs. Unrestricted reserves at 31st March 2023 were £34,457.

The present level of unrestricted reserves equates to 1 month running costs. However, it falls short of the lower threshold. Therefore, the strategy will be to continue to act prudently in relation to the organisations reserves. However, Southwark Carers will assess the viability of reinvesting funds into services where there is a demonstrable need that cannot be met through other sources of funding.

PLANS FOR FUTURE PERIODS

We look forward to diversifying our income and our funding streams further by making applications to national and local trusts. We look forward to working with Southwark Council in developing future services for Carers.

SOUTHWARK CARERS

DIRECTORS REPORT FOR THE YEAR ENDED 31st MARCH 2023

We look forward to developing and strengthening our local and national partnerships in order to develop models of best practice, around all services for carers, for example emergency planning.

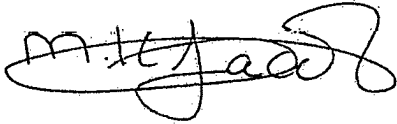
We look forward to developing our partnership with COPSINS and developing further joint bids within this partnership.

FINANCIAL REVIEW

The total income for the year was £ 312,473 in 2023 compared to £ 308,797 in 2022. The charitable expenditure decreased from £299,376 in 2023 to £307,184 in 2022.

This report has been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

Approved by the Directors and Signed on their behalf by:

A handwritten signature in black ink, appearing to read 'm. jacob', written over a horizontal line.

Mary Jacob

26th April 2024

Independent examiner's report to the trustees of Southwark Carers

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 March 2023.

Responsibilities and basis of report

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Independent examiner's statement

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

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.

Financial Warehouse Company Ltd
Chartered Certified Accountants
The Maidstone Terrace
Maidstone ME15 6AW

26/04/2024

Statement of financial activities (incorporating an income and expenditure account)

For the year ended 31 March 2023

| | | Unrestricted funds £ | Restricted income funds £ | 2023 Total funds £ | 2022 Total funds £ |
|---|--------------|----------------------------|---------------------------------|-----------------------------|-----------------------------|
| Income from: | Notes | | | | |
| Income and endowments from: | | | | | |
| Donations and legacies | 2 | 9,944 | - | 9,944 | 1,326 |
| Charitable activities | | - | - | - | 161,928 |
| -Aging Well Project | 3 | - | 125,446 | 125,446 | 137,150 |
| -Advice, Information and Support | 3 | 166,750 | 10,333 | 177,083 | - |
| -Enabling, Empowering & Enriching | | - | - | - | - |
| Other trading activities | | - | - | - | - |
| Investments | | - | - | - | - |
| JRS grant | | - | - | - | 8,393 |
| Total | | 176,694 | 135,779 | 312,473 | 308,797 |
| Resources expended | | | | | |
| Expenditure on: | | | | | |
| Raising funds | | - | - | - | - |
| Charitable activities | | - | 125,446 | 125,446 | 161,928 |
| -Aging Well | | - | - | - | - |
| -Advice, Information and Support | | 163,597 | 10,333 | 173,930 | - |
| -Enabling, Empowering & Enriching | | - | - | - | 145,256 |
| Total | 5 | 163,597 | 135,779 | 299,376 | 307,184 |
| Net income/(expenditure) before investment | | 13,097 | - | 13,097 | 1,613 |
| Net gains/(losses) on investments | | - | - | - | - |
| Net income/(expenditure) | | 13,097 | - | 13,097 | 1,613 |
| Transfers between funds | | - | - | - | - |
| Other recognised gains/(losses): | | - | - | - | - |
| Gains and losses on revaluation of fixed assets for the | | - | - | - | - |
| Other gains/(losses) | | - | - | - | - |
| Net movement in funds | | 13,097 | - | 13,097 | 1,613 |
| Reconciliation of funds: | | | | | |
| Total funds brought forward | | 21,360 | - | 21,360 | 19,747 |
| Total funds carried forward | 13 | 34,457 | - | 34,457 | 21,360 |

As at 31 March 2023

| | | | Unrestricted funds £ | Restricted income funds £ | 2023 Total funds £ | 2022 Total funds £ |
|--|----|--|-------------------------|------------------------------|--------------------------|--------------------------|
| Tangible assets | | | 7,248 | - | 7,248 | 6,372 |
| Investments | | | - | - | - | - |
| <i>Total fixed assets</i> | 11 | | 7,248 | - | 7,248 | 6,372 |
| Current assets | | | | | | |
| Debtors | 12 | | 12,258 | - | 12,258 | 30,877 |
| Investments | | | - | - | - | - |
| Cash at bank and in hand | | | 40,247 | - | 40,247 | 14,989 |
| <i>Total current assets</i> | | | 52,505 | - | 52,505 | 45,866 |
| Creditors: amounts falling due within one year | 12 | | (25,296) | - | (25,296) | 30,878 |
| <i>Net current assets/(liabilities)</i> | | | 27,209 | - | 27,209 | 14,988 |
| <i>Total assets less current liabilities</i> | | | 34,457 | - | 34,457 | 21,360 |
| Creditors: amounts falling due after one year | | | - | - | - | - |
| Provisions for liabilities | | | - | - | - | - |
| <i>Total net assets or liabilities</i> | 13 | | 34,457 | - | 34,457 | 21,360 |
| Funds of the Charity | | | | | | |
| Endowment funds | | | - | - | - | - |
| Restricted income funds | | | - | - | - | - |
| Unrestricted funds | | | 34,457 | - | 34,457 | 21,360 |
| <i>Total funds</i> | 13 | | 34,457 | - | 34,457 | 21,360 |

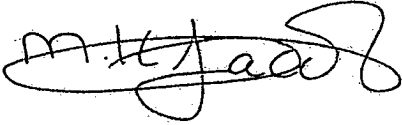
The directors consider that the company is entitled to exemption from the requirement to have an audit under the provisions of section 477 of the Companies Act 2006 and members have not required the charitable company to obtain an audit for the year in question in accordance with section 476 of the Act. The Directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and for preparing financial statements which give a true and fair view of the state of affairs of the company as at 31 March 2023 and of its net outgoing resources for the year in accordance with the requirements of sections 394 and 395 of the Act and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company. The financial statements have been prepared in accordance with the special provisions relating to companies subject to the small companies regime within Part 15 of the Companies Act 2006 and in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with

Southwark Carers

Balance sheet

The financial statements have been prepared in accordance with the special provisions for small companies under Part 15 of the Companies Act 2006.

Approved by the trustees on 26th April 2024 and signed on their behalf by

A handwritten signature in black ink, appearing to read 'M. Jacob', written over a horizontal line.

Mary Jacob
Chair

1 Accounting policies

a) Basis of preparation

The financial statements have been prepared in accordance with 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 2015) - (Charities SORP FRS 102) and the Companies Act 2006.

The charitable company meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy or note.

b) Going concern

The trustees consider that there are no material uncertainties about the charitable company's ability to continue as a going concern. Key judgements that the charitable company has made which have a significant effect on the accounts. The trustees do not consider that there are any sources of estimation uncertainty at the reporting date that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next reporting period.

c) Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the income have been met, it is probable that the income will be received and that the amount can be measured reliably.

Income from government and other grants, whether 'capital' grants or 'revenue' grants, is recognised when the charity has entitlement to the funds, any performance conditions attached to the grants have been met, it is probable that the income will be received and the amount can be measured reliably and is not deferred.

For legacies, entitlement is taken as the earlier of the date on which either: the charity is aware that probate has been granted, the estate has been finalised and notification has been made by the executor(s) to the charity that a distribution will be made, or when a distribution is received from the estate. Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably and the charity has been notified of the executor's intention to make a distribution. Where legacies have been notified to the charity, or the charity is aware of the granting of probate, and the criteria for income recognition have not been met, then the legacy is treated as a contingent asset and disclosed if material.

Income received in advance of the provision of a specified service is deferred until the criteria for income recognition are met.

d) Donations of gifts, services and facilities

Donated professional services and donated facilities are recognised as income when the charity has control over the item or received the service, any conditions associated with the donation have been met, the receipt of economic benefit from the use by the charity of the item is probable and that economic benefit can be measured reliably. In accordance with the Charities SORP (FRS 102), volunteer time is not recognised so refer to the trustees' annual report for more information about

their contribution.

On receipt, donated gifts, professional services and donated facilities are recognised on the basis of the value of the gift to the charity which is the amount the charity would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognized in expenditure in the period of receipt.

e) Interest receivable

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the bank.

f) Fund accounting

Restricted funds are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Unrestricted funds are donations and other incoming resources received or generated for the charitable purposes.

Designated funds are unrestricted funds earmarked by the trustees for particular purposes.

g) Expenditure and irrecoverable VAT

Expenditure is recognized once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably. Expenditure is classified under the following activity headings:

- Costs of raising funds relate to the costs incurred by the charitable company in inducing third parties to make voluntary contributions to it, as well as the cost of any activities with a fundraising purpose
- Expenditure on charitable activities includes the costs of delivering services, undertaken to further the purposes of the charity and their associated support costs.
- Other expenditure represents those items not falling into any other heading

Irrecoverable VAT is charged as a cost against the activity for which the expenditure was incurred.

h) Allocation of support costs

Resources expended are allocated to the particular activity where the cost relates directly to that activity. However, the cost of overall direction and administration of each activity, comprising the salary and overhead costs of the central function, is apportioned on the basis which are an estimate, based on staff time, of the amount attributable to each activity.

Where information about the aims, objectives and projects of the charity is provided to potential beneficiaries, the costs associated with this publicity are allocated to charitable expenditure.

Where such information about the aims, objectives and projects of the charity is also provided to potential donors, activity costs are apportioned between fundraising and charitable activities on the basis of area occupied by each activity.

i) Operating leases

Rental charges are charged on a straight line basis over the term of the lease.

j) Tangible fixed assets

Items of equipment are capitalized where the purchase price exceeds £550. Depreciation costs are allocated to activities on the basis of the use of the related assets in those activities. Assets are reviewed for impairment if circumstances indicate their carrying value may exceed their net realisable value and value in use.

No depreciation charge on the building is made on the grounds that it would be immaterial because the estimated remaining useful economic life is expected to be more than 50 years.

Depreciation is provided at rates calculated to write down the cost of each asset to its estimated residual value over its expected useful life. The depreciation rates in use are as follows:

| | |
|---------------------------|---------------------------|
| Fixture and Equipment | 33 1/3% p.a straight line |
| Computers | 33 1/3% p.a straight line |
| Buildings and Maintenance | 33 1/3% p.a straight line |

k) Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

l) Cash at bank and in hand

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account. Cash balances exclude any funds held on behalf of service users.

m) Creditors and provisions

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

n) Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortized cost using the effective interest method.

o) Pensions

The charity operates stakeholder pension scheme

Income from donations and legacies

| 2 | Unrestricted Fund | Restricted Fund | Total 2023 | Total 2022 |
|-----------|-------------------|-----------------|--------------|--------------|
| Donations | 9,944 | - | 9,944 | 1,326 |
| | - | - | - | - |
| | <u>9,944</u> | <u>-</u> | <u>9,944</u> | <u>1,326</u> |

Income from charitable activities

| 3 | Unrestricted | Restricted | Total 2023 | Total 2022 |
|---|----------------|----------------|----------------|----------------|
| Contract Income | | | | |
| Southwark Council | 166,750 | - | 166,750 | 166,750 |
| | - | - | - | - |
| | <u>166,750</u> | <u>-</u> | <u>166,750</u> | <u>166,750</u> |
| <u>Grant Income</u> | | | | |
| Aging Well | - | 125,446 | 125,446 | 125,446 |
| Southwark Council | - | - | - | - |
| | - | 3,833 | 3,833 | 3,185 |
| United ST Saviours | - | 4,000 | 4,000 | 1,000 |
| The League Community | - | 0 | 0 | 5,995.0 |
| Furlough Grant | 0 | - | 0 | 8,393.0 |
| Other Grants | - | 2,500 | 2,500 | 575.0 |
| Total income from charitable activities | <u>0</u> | <u>135,779</u> | <u>135,779</u> | <u>144,594</u> |

| 4 Income from investments | Unrestricted | Restricted | Total 2023 | Total 2022 |
|---------------------------|----------------|----------------|----------------|----------------|
| Investment income | - | - | - | 0 |
| | <u>-</u> | <u>-</u> | <u>-</u> | <u>0</u> |
| Total Income | <u>176,694</u> | <u>135,779</u> | <u>312,473</u> | <u>312,670</u> |

Analysis of Expenditure

Notes 5

| | Cost of raising funds | Citizen Research Project | Enablind, empowering & enriching | Advise and infomration | Support cost | Total 2023 | Total 2022 |
|----------------------------------|-----------------------|--------------------------|----------------------------------|------------------------|--------------|------------|------------|
| Staff costs (Note6) | - | - | 219,728 | - | - | 219,728 | 224,554 |
| Counselling & Facilitating | - | - | - | - | - | - | - |
| Events and Activities | - | - | 1,776 | - | - | 1,776 | 788 |
| Grant Aid | - | - | - | - | - | - | - |
| Support Cost | - | - | - | - | - | - | - |
| Office costs | - | - | 44,176 | - | - | 44,176 | 43,769 |
| Rent | - | - | 10,000 | - | - | 10,000 | 10,000 |
| Computer expenes | - | - | 5,185 | - | - | 5,185 | 11,710 |
| Printing, postage and stationery | - | - | 700 | - | - | 700 | - |
| Telephone & internet | - | - | 2,048 | - | - | 2,048 | 2,493 |
| Insurance | - | - | 3,721 | - | - | 3,721 | 1,906 |
| Bank charges | - | - | - | - | - | - | 120 |
| Independent examiner's fee | - | - | 3,000 | - | - | 3,000 | 3,750 |
| Registration fees | - | - | 2,247 | - | - | 2,247 | 1,942 |
| Professional fees | - | - | 1,578 | - | - | 1,578 | 2,965 |
| Depreciation | - | - | 5,217 | - | - | 5,217 | 3,186 |
| Total Expenditure 2023 | - | - | 299,376 | - | - | 299,376 | 307,184 |
| Support Cost | - | - | - | - | - | - | - |
| Total Expenditure 2023 | - | - | 299,376 | - | - | 299,376 | 307,184 |

Analysis of Expenditure (Prior year)

| | Cost of raising funds | Citizen Research Project | Enablind, empowering & enriching | Advise and infomration | Support cost | Total 2022 |
|----------------------------------|-----------------------|--------------------------|----------------------------------|------------------------|--------------|------------|
| Staff costs (Note6) | - | - | 224,554 | - | - | 224,554 |
| Counselling & Facilitating | - | - | - | - | - | - |
| Events and Activities | - | - | 788 | - | - | 788 |
| Grant Aid | - | - | - | - | - | - |
| Support Cost | - | - | - | - | - | - |
| Office costs | - | - | 43,769 | - | - | 43,769 |
| Rent | - | - | 10,000 | - | - | 10,000 |
| Computer expenes | - | - | 11,710 | - | - | 11,710 |
| Printing, postage and stationery | - | - | - | - | - | - |
| Telephone & internet | - | - | 2,493 | - | - | 2,493 |
| Insurance | - | - | 1,906 | - | - | 1,906 |
| Bank charges | - | - | 120 | - | - | 120 |
| Independent examiner's fee | - | - | 3,750 | - | - | 3,750 |
| Registration fees | - | - | 1,942 | - | - | 1,942 |
| Professional fees | - | - | 2,965 | - | - | 2,965 |
| Depreciation | - | - | 3,186 | - | - | 3,186 |
| Support Cost | - | - | - | - | - | - |
| Total Expenditure 2022 | - | - | 307,184 | - | - | 307,184 |
| Support cost | - | - | - | - | - | - |
| Total expenditure 2022 | - | - | 307,184 | - | - | 307,184 |

6. Net incoming resources for the year

This is stated after charging /crediting

| | 2023 | 2022 |
|---------------------------|--------------|--------------|
| Depreciation | 5,217 | 3,186 |
| Independent Examiner Fees | <u>3,000</u> | <u>3,000</u> |

7. Analysis of staff costs, trustee remuneration and expenses, and the cost of key management personnel

Staff costs were as follows:

| | 2023 £ | 2022 £ |
|---|----------------|----------------|
| Salaries and wages | 189,254 | 196,676 |
| Social security costs | 19,288 | 18,689 |
| Employer's contribution to defined contribution pension schemes | 9,369 | 9,189 |
| | <u>217,911</u> | <u>224,554</u> |

Staff numbers

The average number of employees (head count based on number of staff employed) during the year was as follows:

| | 2023 No. | 2022 No. |
|-----------------------|-------------|-------------|
| Raising funds | - | - |
| Charitable activities | 6 | 6 |
| Support | <u>1</u> | <u>1</u> |
| | <u>7</u> | <u>7</u> |

£60,000 - £69,999

| 2023 | 2022 |
|----------|----------|
| <u>1</u> | <u>1</u> |

The Total employees' benefits including pension and national insurance contributions of the key management personnel were £60,163 (2022:67,850).

The charity trustees were not paid or received any other benefits from employment with the charity in the year (2022:Nil). No charity trustee received payments for professional or other services supplied to the charity (2022: Nil)

For the year ended 31 March 2023

8. Staff numbers

The average number of employees (head count based on number of staff employed) during the year was as follows:

| | 2023 No. | 2022 No. |
|-----------------------|-------------|-------------|
| Raising funds | | |
| Charitable activities | 6 | 6 |
| Support | 1 | 1 |
| | <u>7</u> | <u>7</u> |

9. There are no donations from related parties which are outside the normal course of business and no restricted donations from related parties.

10. Taxation

The charitable company is exempt from corporation tax as all its income is charitable and is applied for charitable purposes.

The charity operates a stakeholder pension scheme. The amounts owed to the pension scheme at each balance sheet date are £791 and the number of staff members of the staff members of the scheme is 7

11. Tangible fixed assets

| Cost | Fixture & equipment £ | Computer & IT equipment £ | Total £ |
|--|-----------------------------|------------------------------------|---------------|
| At the start of the year | - | 64,599 | 64,599 |
| Additions in year | - | 6,093 | 6,093 |
| Disposals in year | - | - | - |
| At the end of the year | <u>-</u> | <u>70,692</u> | <u>70,692</u> |
| Depreciation | | | |
| At the start of the year | - | 58,227 | 58,227 |
| Charge for the year | - | 5,217 | 5,217 |
| Eliminated on disposal | - | - | - |
| At the end of the year | <u>-</u> | <u>63,444</u> | <u>63,444</u> |
| Net book value At the end of the year | <u>-</u> | <u>7,248</u> | <u>7,248</u> |

For the year ended 31 March 2023

12. Debtors & Creditors

| | 2023 | 2022 |
|------------------|---------------|---------------|
| | £ | £ |
| Grant receivable | 12,258 | 30,887 |
| Other debtors | - | - |
| | <u>12,258</u> | <u>30,887</u> |

Creditors: amounts falling due within one year

| | 2023 | 2022 |
|------------------------------|---------------|---------------|
| | £ | £ |
| Taxation and social security | 19,296 | 27,878 |
| Other creditors | - | 0 |
| Accruals | 6,000 | 3,000 |
| | <u>25,296</u> | <u>30,878</u> |

For the year ended 31 March 2023

13. Analysis of net assets between funds

| | General unrestricted | Designated | Restricted | Total funds |
|--|-------------------------|------------|------------|----------------|
| Tangible fixed assets | 7,248 | - | - | 7,248 |
| Net current assets | 27,209 | - | - | 27,209 |
| Net assets at the end of the year | 34,457 | - | - | 34,457 |

Analysis of net assets between funds (prior year)

| | General unrestricted | Designated | Restricted | Total funds |
|--|-------------------------|------------|------------|----------------|
| Tangible fixed assets | 6372 | - | - | 6,372 |
| Net current assets | 14988 | - | - | 14,988 |
| Net assets at the end of the year | 21,360 | - | - | 21,360 |

14. Movements in funds

| | At the start of the year £ | Incoming resources & gains £ | Outgoing resources & Losses | Transfers £ | At the end of the year £ |
|---------------------------------|----------------------------------|---------------------------------------|-----------------------------------|----------------|-----------------------------------|
| Restricted Funds | | | | | |
| Aging Well | - | 125,446 | (125,446) | - | - |
| Others | - | 10,333 | (10,333) | - | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Total Restricted funds | - | 135,779 | (135,779) | - | - |
| Unrestricted Funds | 21,360 | 176,694 | (163,597) | - | 34,457 |
| | | | | | - |
| Total Unrestricted funds | 21,360 | 176,694 | (163,597) | - | 34,457 |
| Total Funds | 21,360 | 312,473 | (299,376) | - | 34,457 |

Movements in funds (prior year)

| | At the start of the year £ | Incoming resources & gains £ | Outgoing resources & Losses | Transfers £ | At the end of the year £ |
|---------------------------------|----------------------------------|---------------------------------------|-----------------------------------|----------------|-----------------------------------|
| Restricted Funds | | | | | |
| Age UK | - | 172,683 | (172,683) | - | - |
| | - | - | - | - | - |
| Total Restricted funds | - | 172,683 | (172,683) | - | - |
| Unrestricted Funds | 19,748 | 136,113 | (134,501) | - | 21,360 |
| | | | | | |
| Total Unrestricted funds | 19,748 | 136,113 | (134,501) | - | 21,360 |
| Total Funds | 19,748 | (36,570) | 38,182 | - | 21,360 |

Funds: Total funds

Purposes of restricted funds

All carers in Southwark will have access to the practical and emotional support they need and the recognition and influence they deserve. The purpose of the restricted funds are to organise the activities for carers- "Reducing Social Isolation, Advice, Information and Support, Health and Well Being, Identifying Hidden Carers and Financial Support ".

15. Operating lease commitments

The charity has no future minimum lease payments under non-cancellable operating leases.

16. Legal status of the charity

The charity is a company limited by guarantee and has no share capital. The liability of each member in the event of winding up is limited to £1.