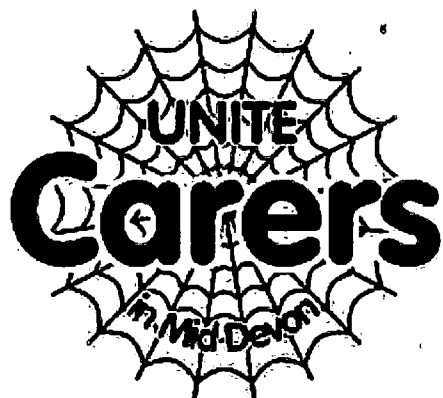




Unite Carers in Mid Devon

ANNUAL REPORT

1ST APRIL 2023 - 31ST MARCH 2024

Unite Carers is a Company limited by Guarantee

Charity Number: 1099188

Company Number: 04779388

2 Bridge Street, Tiverton, Devon EX16 5LY

Telephone No.: 01884 257511

e-mail: info@unitemd.org.uk

Website: www.unitecarers.org.uk

Patrons:

Angela Rippon CBE, Lady Louise Amory

Unite Carers in Mid Devon

Information and Support for Carers

A Carer is a person who provides regular unpaid care for a friend or relative who cannot manage alone because of severe illness, disability, frailty, or vulnerability.

The aims of Unite Carers' Service are:

To promote any charitable purpose for the benefit of unpaid carers who look after someone who depends on them in the Mid Devon community, by the advancement of education, the protection of health and the relief of poverty, sickness and distress; also to ensure that every individual is made aware of the services available to them and is given the opportunity to express their needs effectively, regardless of race, gender, sexuality or disability.

Contact details:

**Unite Carers In Mid Devon
2 Bridge Street
Tiverton
EX16 5LY**

**Tel: 01884 257511
Email: info@unitemd.org.uk
Website: www.unitecarers.org.uk**

Office open by appointment.

Unite Carers in Mid Devon

Board of Trustees:

Positions as at 31st March 2024:

Bernice Philbrick	Chair of Trustees & Safeguarding Trustee
Jack Bukin	Trustee - IT
Patricia Eardley	Trustee
Paul Fitzmaurice	Trustee – Governance
Stephanie Hart	Trustee - Secretary
Tina Webber	Trustee

Positions as at 20th September 2024:

Bernice Philbrick	Chair of Trustees & Safeguarding Trustee
Fiona Bladon	Trustee (appointed August 2024)
Jack Bukin	Trustee - IT
Janine Stedman	Trustee (appointed September 2024)
Patricia Eardley	Trustee
Simone Thompson	Trustee (appointed April 2024)
Stephanie Hart	Trustee - Secretary
Tina Webber	Trustee

Staff:

Sharon Trerise	General Manager
Tracy Downs	Carers' Services Manager

CHAIRMAN'S ANNUAL REPORT

This morning when considering what to put in this year's report, I thought I would look at a few local charities to see how they have survived over these past few difficult years. I was amazed at the numbers of different charities in Devon, 4000 of them. I asked myself how they survived, or even did they? Unite Carers was there within their numbers, and yes, we did survive, and we are surviving, in fact we are in a more secure position now than we have been for a few years.

Not to rest on our laurels, we know that the effort to keep afloat is ever present, but it's good to take a small breather.

The major element keeping our services going must be our ability to fund these services. It's not easy, gone are the days when a letter to a generous funding source might result in financial help. These days there are complicated forms to fill in correctly, (no mistakes accepted), before we even get considered.

So, when Andrew Grzesinski became a volunteer with special skills in fundraising and all it entails, we were very fortunate and seized his offer of help with both hands. Andrew worked with Sharon improving our finances to the point where we can start to consider employing a much needed third member of staff.

In July 2023, we were sad to lose Natalie, our Treasurer, the demands of a full-time job and a young family just didn't allow her time to fill the post as she would have liked.

Jenny Baker also resigned from her post as a Trustee. Jenny had been a great strength when our Board of Trustees was down to three.

In October, Stephanie joined us as a Trustee and official minutes taker.

Our IT updated systems continue to run smoothly under Jack's watchful eye.

Trustees have received training in good governance; fulfilling and understanding their role; GDPR issues and the legal duties of a Trustee.

To all the Trustees I give my personal thanks for their commitment understanding and ever-present support.

To indicate that our services are safe, of high quality and that they meet certain requirements we decided to update and renew the Quality Assurance Mark, Tracy was engaged in the organisation of this.

In August we were saddened to learn that Roy Grantham, our retired Chairman had died. Roy chaired Unite for 8 years steering us through many changes and through the covid period. Sharon, Tracy, Lara, Neil and I attended his funeral. Even then Roy did not forget Unite, all donations at his funeral were dedicated to Unite.

Chairman's Annual Report (Continued)

As you will see from the statistics report our numbers in all fields are generally rising. Sharon and Tracy will give you more information about this.

We have benefited from the generosity of local businesses, not always with direct finance but, in the case of a local housing developer Barratt David Wilson Homes, our offices received a makeover when a team from the building firm armed with paintbrushes arrived to transform Unite's working environment.

I have attended several networking promotional events and cheque presentation meetings throughout the year with Sharon.

On 23rd September volunteers from various charities across Devon received a Royal commendation from HRH Sophie Duchess of Edinburgh at a special breakfast event held at Cold Harbour Mill hosted by David Fursdon, Lord Lieutenant of Devon.

The event focused on bringing together some of the 4000 Devon Charities to discuss their challenges and ways of helping. Sharon and I attended this event giving us both the opportunity to talk with the Duchess of Edinburgh who showed remarkable insight into the problems facing charities.

In December, the Lost Kitchen, a local restaurant in Chettiscombe, gave our volunteers a splendid evening of food, wine and general enjoyment. Earlier in the year the Lost Kitchen had invited our Volunteers to a Cream Tea - another generous gesture.

To Our Team of committed volunteers.

We the Trustees are filled with admiration at the dedication shown by you as you help ease the load our carers bear, at your willingness to give your time and energy and at your unfailing support given to those that Unite Carers was set up to assist.

You do not seek gratitude, but heartfelt messages from grateful users of our services thanking you for helping them through the bad times are not uncommon. We accept them with pride and share them with you. You are the heart of Unite, without you we would not BE.

Our staff Sharon and Tracy have kept Unite going when times were hard, and resources stretched not just with the general administration; the finance; organising volunteers and cleaning the offices.... but with personal sacrifice as well, working through the cold weather with no heating, wearing scarves gloves and plug in electric blankets around their knees. That's dedication.

Thank you, Sharon and Tracy Unite Carers salute you.

Bernice Philbrick
Chair of Trustees

GENERAL MANAGER OVERVIEW

After a difficult couple of years coming out of covid, the recruitment of new Trustees has strengthened the experience and guidance from the Board enabling us to look forward and plan for the future.

With the support of Tracy working 21 hours per week, I have been able to concentrate on working with our Advisor Andy Grzesinski on applications for larger amounts of funding in order to give the charity stability going into our 21st year.

You will see from our donations and grants listings that we are supported by local people with small amounts as well as receiving large amounts from funders such as The National Lottery. As Tesco says – every little helps – and we are very grateful for the ongoing local support.

I am delighted that our finances are in a much better position, which means we can now start looking for a third member of staff.

My role as General Manager means that I oversee the day to day running of the charity as well as preparing the accounts, budgeting and funding applications.

It is a privilege to be working with such wonderful volunteers. Reading through Tracy's report fills me with pride on how much we are supporting unpaid carers in Mid Devon – we couldn't provide the services we offer without the dedication of our volunteers and the time that they freely give to the charity.

Our website and Facebook pages are full of information for carers, but most importantly we are able to support carers who do not have access to the digital world and want to see us face to face. As well as the monthly support groups and face to face befriending, carers are able to drop into our office for direct support. We are generally open at least 10 am to 4 pm Monday to Friday, but it is always best to call ahead in case Tracy and I are in meetings, covering groups, or indeed on leave! We use our No 4 office for many of our support groups which means we are able to get to know our carers more personally and support volunteers when needed.

There have been many highlights from the last 12 months – not least my contact with our Patron Angela Rippon – especially during her time on Strictly Come Dancing! Breakfast with Sophie, Duchess of Edinburgh at Coldharbour Mill was of course a privilege. However, the best part of the job is helping support our carers and going the extra mile. The thank you messages we receive often bring Tracy and I to tears, and we are proud to work with our volunteers who are part of the Unite family.

September 2024 marks my 10th anniversary working for the charity. From covering the Office Administrator on maternity leave to becoming General Manager – working with young carers and Devon Carers staff. The last decade has been eventful but fun and I have enjoyed (almost!) every minute of it!

I hope I will still be here supporting volunteers and carers for many years to come.

Best wishes

Sharon Trerise
General Manager

UNITE CARERS INCOME 2023/2024

Grants:	David Gibbons Foundation	£	3,000.00
	Barratt Foundation	£	10,000.00
	Clare Milne Foundation	£	5,000.00
	Co-operative Community Grant	£	2,012.67
	Devon Memory Café Consortium	£	800.00
	Foyle Foundation	£	7,500.00
	Francis Winham Foundation	£	20,000.00
	Garfield Weston Foundation	£	10,000.00
	Groundwork (UK) Tesco Blue Tokens	£	2,125.00
	Masonic Charitable Foundation	£	4,322.00
	Sobell Foundation	£	10,000.00
	Weinstock Fund	£	3,000.00

Total Grants: £ 77,759.67

Donations:	Andrew Grzesinski	£	10.00
	Bampton Coffee Morning	£	60.45
	Bampton PCC	£	700.00
	Barratt David Wilson donation	£	964.84
	Bellway Homes	£	400.00
	Christina Dymond donation	£	16.10
	Culm Valley Oasis Donation	£	22.00
	David Saunders	£	156.00
	Dawn Pugsley	£	20.00
	Diana	£	5.00
	FMN Cafe collection pot	£	25.00
	H Trust	£	1,000.00
	Heathcoat Fabrics Limited	£	3,500.00
	In Memory of Roy Grantham	£	165.00
	Jenny Marks	£	40.00
	John Clist	£	175.00
	Maggie Tinson	£	50.00
	Margaret Phillips	£	20.00
	Maureen Whiteley	£	500.00
	Mr & Mrs Fitzmaurice	£	1,800.00
	Mr & Mrs Larby	£	100.00
	Mr & Mrs Ogle	£	50.00
	Oakford Village Hall Committee	£	85.00
	Prof Warwick Clegg	£	50.00
	Richard Hill	£	20.00
	Ruth Broomfield	£	50.00
	Simon Smith	£	30.00
	Sir John Amory	£	250.00
	St Andrews Church	£	100.00
	Sue Griggs Tiverton Town Mayor	£	100.00
	The Lost Kitchen	£	200.00
	Tiverton & District Lions Club	£	200.00
	Tiverton Charity Bingo	£	500.00
	Withleigh Village Hall Donation	£	100.00

Total Donations: £ 11,464.39

Other Income:	Gift Aid	£	2,061.08
	Safe Stop	£	1,310.00
	Amazon Smile	£	18.41
	No 4 room hire	£	10.00

Total other income: £ 3,399.49

Interest:	Interest	£	2,777.00
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TOTAL INCOME: £ 95,400.55

Unite Carers – Making A Difference

We very much appreciate feedback from carers and professionals about our services - these are a few examples!

Feedback from Carers:

“Sharon and Tracy are my ‘go to’ support for information and deliver in a very caring way. They regularly check up on me to see if I’m ok. The befriending suggestion has been priceless in finding Fiona. Tina’s help with form-filling helped to secure Attendance Allowance in full. The monthly meetings are something to look forward to. Ladies, you are a mine of information and I’m so grateful to you all. I would definitely recommend Unite Carers to other carers.”

“I have made changes in my life as a result of the volunteer support I received. The help that I was given was absolutely great. Got me really back into it and I’m so grateful. Thank you very much.”

“I think this service is so vital, it really helped me to have a regular person to talk to. Thank you.”

“The help from Tracy was invaluable. She filled in the application form for me and I received the HSF very quickly and without any hassle. It was very much appreciated. I would just like to say that Unite Carers monthly meetings have been a great support to me. Thank you all.”

“Tracy kindly helped me complete forms. Sharon is also very helpful emailing and advising of relevant meetings, training sessions, etc. Denise and Fiona are also wonderful volunteers; they are knowledgeable and very supportive. I enjoy meeting with other carers and sharing experiences, very therapeutic. Unite Carers has so much to offer – ie friendship, emotional support, a ‘listening ear’, opportunities, guidance, advice, training, education, social activities for both carers and those being cared for. We are not alone. I often recommend Unite Carers to those struggling and in need.”

“Just feeling the support and receiving understanding regarding your carer role was uplifting. It made a tremendous difference. Changes were made but sometimes hard to sustain as circumstances bring more challenges.”

Continued/.....

Carers' feedback continued:

"My counselling sessions were easy going in a calm environment at Unite Bridge Street. There was no feeling of being hurried and clock watching, which allowed each session to flow. Various 'papers' or homework to do a bit of self reflection/assessment were useful."

"I'm feeling less lonely. Enjoying Wednesday meetings. Jenny is very helpful."

"Unite provided me with an opportunity for counselling and facilitated the counselling meeting room. They provided relevant literature and loan of books. They organised monthly social meetings for carers and email reminders and updates."

"My wife has Lewy Body Dementia and a number of other health problems. For most of the time I am her sole carer. This can be a lonely road to travel as the condition has no treatment, no cure and is progressive. Any compassionate contact from others - especially those who have comparable personal experience - is greatly appreciated and is of significant psychological help."

"The staff and volunteers at Unite Carers are so welcoming and nothing is too much trouble at all. They bend over backwards to help."

"Unite Carers have made such a difference to us. Without it we would have had no positive contact since the diagnosis. So thank you from both of us for all you do."

Feedback from Professionals:

"I just wanted to feed back as I met with L earlier today and it was like meeting with a different person since I first started working with her a month ago. Now she knows that there is support available and people to reach out to should she require advice, or just needs a safe, non-judgemental space to be able to share experiences with someone who understands, it has totally transformed things for her and she no longer even requires our Wellbeing involvement. Her feelings of overwhelm have been replaced with calm and she described it as a huge weight having been lifted off her shoulders. Thank you for helping make such a difference!"

"Thank you so much Tracy – you are just epic!!! I am sure this will make a difference to C. I will catch up with her in a few weeks and see if I can link her with anything else. Thank you so much for being so awesome. I am so pleased for C."

Thank you to everyone who has taken the time to send us such positive feedback 😊

AGM Report for Adult Carers' Services

1st April 2023 – 31st March 2024

At the last AGM I introduced myself to you as the new Carer's Services Manager, taking over from Sarah Taft and Jenny Tower and I've now been in role, working 21 hours a week, since 1st November 2022. The time has flown by so quickly, I've been kept very busy and it's almost incomprehensible to me to think that I have already been in post for nearly two years. Thank you for accepting me so warmly into your Unite family.

The main part of my role is co-ordinating the 1:1 services but as with any small charity such as ours, staff have to be adaptable and often a "Jack of all trades" so it's hard to define what my job role is – one day I'll be on a home safety visit for befriending or providing targeted 1:1 support and the next I'll be trying to unblock the sink in the office.

Small charities also find funding hard to come by and grant applications are laborious and take time. Sharon (supported by Andy) has done an amazing job over the last year securing funding to ensure that Unite Carers is more financially viable than it's been in recent history, certainly for the past 2 years.

But we all know and acknowledge that Unite Carers couldn't support carers in the way that it does without the unwavering support of our loyal volunteers and all that they do to help others. Whether this is through leading or helping at the groups, giving your time in so many ways, or giving vital support through our host of 1:1 services, we just cannot do it without you. Once again, thank you - Unite are very lucky to have you.

Part of my role is to produce statistics, so let's start with Unite's important volunteers:

Volunteers

❖ **As at 31st March 2024, Unite Carers were supported by 56 volunteers (Aug 24: 58).**

Of those 56 volunteers:

19 were supporting the Groups – no increase from end-March 2023 (Aug 2024: 20 vols).

29 were providing 1:1 Befriending Support and/or Telephone Friendship – increased from 22 at end-March 2023 (Aug 2024: 30 vols).

4 volunteers were providing IT Support – increased from 3 at end-March 2023 (Aug 2024: 5 vols).

7 volunteers were providing Form Filling Support – increased from 5 at end-March 2023 (Aug 2024: 6 vols).

1 volunteer was providing CFC Counselling for Carers (Aug 24: 2 - Catherine and Simone).

6 volunteers were providing admin or office support – increased from 5 at end-March 2023 (Aug 24: 6).

All volunteers have received a DBS check and are DBS clear and all have been offered an annual Volunteer Support Meeting this year, with 15 volunteers taking up the offer to meet with a member of staff or a trustee.

This year, Unite's volunteers have been offered the following additional training:

- 4 Mental Health: Emotional Resilience – Pete's Dragons
- 4 Mental Health: Community Suicide Awareness - Pete's Dragons
- Dementia Awareness training - Devon Memory Consortium
- Level 1 Awareness of Safeguarding Adults – DCC
- Level 1 Awareness of the Mental Capacity Act - DCC

Now for the people we are all here to help - unpaid carers and former carers:

Carers

Carer Registrations

- ❖ **As at 31st March 2024 there were 351 carers registered with Unite Carers, an increase of 12.5% from 312 in the same period of 2023. (Aug 24: 391 carers registered).**

A very warm welcome to you all!

Carers Services – The Groups

- ❖ **During the period 1st April 2023 - 31st March 2024, Unite Carers were offering 15 Support Groups to Carers (currently 13 groups for Aug 24)**

Our groups are split into categories and Unite currently have 4 support and friendship groups for Carers of people with any medical condition. They are:

- The Bampton Carers' Coffee Group led by Denise.
- The Cullompton Carers' Coffee Group led by Jean.
- The Tiverton Carers' Coffee Group led by Denise and Fiona.
- The Crediton Carers' Coffee Group led by Tracy (staff).

Unite's groups for Carers of people with dementia are:

- The Tiverton Forget Me Not Café for carers and the people they care for, led by Denise and Fiona with the help of our team of FMNC volunteers.
- The Culm Valley Oasis, led by Audrey and Veronica.
- The Exe Valley Oasis, led by Denise and Fiona.
- The DJ Group "A Different Journey" – For Carers and their loved ones who may be just starting out on their dementia journey, led by Fiona.

Unite's groups for Parent Carers are:

- The Let's Unite at No.4, for Parent Carers of school-aged children with additional needs, led by Jenny T.
- The Carers of Adults and Teens (16+) with Additional Needs Group, led by Jenny T.

Unite's Group just for cared-for-people is the:

- Safe Stop Social group in Tiverton, which runs twice monthly, led by Jenny T, Mo and the Safe Stop Team.

Unite's groups for Former Carers (Ex-Carers) are:

- The Uffculme Carers and Ex-Carers Lunch Group, led by Jackie.
- The Tiverton and Cullompton Ex-Carers Lunch Group, led by Veronica and Jenny F.

Two Groups were sadly discontinued in 2023-2024, they were:

- Let's Unite Outdoors Group for Parent Carers and their families – ended Nov 2023
 - Witheridge Safe Stop Group – A safe space for cared-for and vulnerable people – ended Feb 2024.
- ❖ For the period 1st April 2023 – 31st March 2024 there were 1,499 recorded attendances at the Groups. There were 518 attendances for the period April 24 to August 24, down 22% of 668 attendances compared to the same period in 2023, indicating a downturn in attendances for the period so far. The data includes carers, cared-for and volunteers.

Carers' Services – One-to-One Support

Befriending and Telephone Friendship

Unite's free Befriending Service matches carers with a like-minded volunteer befriender who they can meet for a cup of tea and a chat in a local café perhaps, plan an activity or outing together, or visit carers in their homes if they are unable to get away.

Prior to the befriending match, there is a conversation with the carer, more formally known as "The Carer's Assessment", to find out what the carer's needs and wants are from the befriending relationship, the type of person they would like as their befriender, how often they would like to meet and where, interests and hobbies etc. If meetings are expected to take place in the carer's home, a home visit is carried out prior to the first get-together. A review is then carried out after 3 months to make sure that both parties are happy, although contact is encouraged at any point should a problem arise. Our carers and befrienders know that any problems will be handled tactfully, discreetly and with care.

We also offer Telephone Friendship, based on the model above, so that carers can enjoy chatting with someone over the phone, from the comfort of their own home.

Unite Carer's Befriending Service is unique, not just because it's one of the only befriending services still available in Mid Devon, but because it's not time limited – when carers are set up with their befriender and are happy in the 3-month review period, they can continue to see their befriender for as long as they would like. We don't take the support away.

New for this year, to bring us in line with our Groups, we have secured funding from Devon Community Foundation to allow befrienders to treat carers to refreshments of their choice when they meet up - coffee and cake perhaps. Thank you to DCF for this funding, it's really making a difference to both carers and volunteers.

- ❖ **As at 31st March 2024, 32 Carers were receiving Befriending Support and 10 were receiving Telephone Friendship – Total 42, a 17% increase from 36 in the same period of 2023.**
- ❖ **As at Aug 2024, 40 carers are receiving Befriending Support and 9 are receiving Telephone Friendship – Total 49).**

The Befriending Team - those who give help either in person or by telephone, many of whom also help with the Groups - are amazing. Your dedication to the people you support is compassionate, professional, and incredibly inspiring to me and to others. You give comfort and friendship to carers when they need it the most. Thank you all so much.

Counselling For Carers

We re-started our free Counselling For Carers service in February 2023 with Jessie and it remains a vital support service to carers, at a time when they need it most. This year we have been very lucky to have worked with 3 new student counsellors, in collaboration with Petroc and Exeter Colleges. Lyndsey volunteered private counselling sessions to carers between December 2023 and May 2024, and Catherine and Simone started with us in April 2024 and continue to give valuable support to carers registered with us.

All our counsellors were/are in their fourth and final year working towards the Lv.4 Diploma in Counselling with the gold standard CPCAB (Counselling & Psychotherapy Central Awarding Body), are insured, professionally supervised and DBS clear.

The initial course of 6-8 counselling sessions (more offered if necessary) can take place in person in a private and safe space at Unite's meeting rooms at No. 4 Bridge Street, or via video link, or a combination of both, according to the carer's personal preference.

- ❖ **For the period 1st April 2023 to 31st March 2024, our counsellors delivered counselling sessions to 13 carers and Catherine and Simmone have continued to offer this vital service to 11 more carers from April 2024 onwards.**

Thank you so much Jessie, Lyndsey, Catherine and Simmone. Your empathic approach, professionalism and commitment to carers and to Unite, is greatly appreciated by us all.

Form-filling Support

Unite's form-filling service has been very much in demand this year as we continue to receive even more requests from carers for help to complete long and complicated paperwork. We have helped carers with anything from Attendance Allowance to Blue Badge applications, the Household Support Fund to Disability Living Allowance, either in paper or on-line form. We have also offered confidential space and IT facilities to carers when their home environment isn't suitable for the task at hand.

- ❖ **For the period 1st April 2023 to 31st March 2024, 55 Carers accessed form-filling support with Unite, a 450% increase from 10 for the same period last year.**

Thank you to our hard-working form-filling volunteers. I am very aware that I have asked a lot of you this year and yet you still keep delivering, making a real difference to the lives of

so many people. Thank you, we really appreciate how difficult and time consuming this voluntary role can be and you are amazing.

I'd also like to take this opportunity to thank the carers who have made a voluntary financial contribution to the counselling and form-filling services this year; your generosity allows Unite to continue to provide these important services to all unpaid carers.

IT Support

Compared to our other 1:1 services, IT support has been a little quiet this year, but still slightly busier than the same period last year.

- ❖ **For the period 1st April 2023 to 31st March 2024, 9 Carers have accessed IT support, a 28.5% increase from 7 for the same period last year.**

Our IT support volunteers are available to help carers and former carers to get started on-line, or to get a better understanding of the IT they are currently using. Whether this be setting up an email address, shopping on-line, using social media or understanding a smartphone, laptop, or any other device.

Thank you to our IT Support volunteers for all your help, knowledge and expertise.

Newsletters and Social Media Accounts and IT

Newsletters

We have had a lot of good feedback on the Unite Carer's quarterly Newsletter but always welcome comments and suggestions on who we can make things better. Please get in touch.

New Website

Have you seen our new website? It's now "live" and it can be seen here:

www.unitecarers.org.uk

Thank you to Jack for helping massively with this and continuing to do so.

Facebook

Unite has had its own Facebook page for quite a while now and it can be seen here:

www.facebook.com/unitecarers

To help to avoid the inevitability of digital exclusion as much as we can, Unite Carers still provide paper copies of information for those that need it. However, if any of our registered carers would like help to access either the new website or Facebook, please do contact us for help, or to arrange for help with one of our IT support volunteers.

Unite Carers – Quality Assured

At the last AGM I spoke about Unite working towards the Devon Voluntary Action Quality Assurance Mark, after the previous award expired in October 2021 . I am now extremely

pleased and proud to be able to tell you that we have now been awarded the Quality Assurance mark for another 3 years. The DeVA Quality Assurance award is for charities providing health and wellbeing services and activities in Devon and demonstrates that Unite Carers offers high quality services by means of attention to every stage of the process of delivery. This award is for all our services across the charity.

In addition, we have also been awarded the Devon Memory Café Consortium Quality Assurance Mark for memory cafes, providing health and wellbeing services across Devon. This award is specifically for our much loved Forget Me Not Café in Tiverton.

Thank you to Involve for their help, support and humour in helping us to achieve this award.

This just leaves me to say again, wholeheartedly, thank you. Thank you to Carers and their families, to volunteers, including the Board of Trustees who all give their time so generously, to Jenny for her support with safeguarding, to our patrons Angela Rippon and Lady Louise Amory and last but not least, to my friend and colleague Sharon who this year celebrates her 10-year anniversary working for Unite Carers in Mid Devon.

Tracy Downs
Adult Carers' Services Manager
Unite Carers in Mid Devon

31st August 2024

Unite Carers Support Groups Spring 2024

Who's it for?	Group Name	Location	With	Day in month	Time
All Carers	Bampton Carers' Coffee Group	The Swan, Bampton	Denise	1 st Thursday	11.00 am – 12 noon
All Carers	Crediton Carers' Coffee Group	@100 Café, High St, Crediton	Tracy	3rd Thursday	11.00 am - 12.30pm
All Carers	Cullompton Carers' Coffee Group	The Hayridge, Cullompton	Jean	2 nd Wednesday	10.30 am - 12 noon
All Carers	Tiverton Carers' Coffee Group	Unite Carers, 4 Bridge St, Tiverton	Denise & Fiona	4 th Tuesday	2 pm
All Carers and Former Carers	Uffculme Support Group	Locations change monthly – Please call the office	Jackie	4 th Monday	12.30 pm
Cared-for-people	Tiverton Safe Stop Group	Cherith Hall, Tiverton	Jenny	2 nd and 4 th Wednesday	10.00 am - 12.30 pm
Carers of adults and teens 16+ with additional needs	Carers of Adults and Teens with Additional Needs	Unite Carers, 4 Bridge St, Tiverton	Jenny	3 rd Wednesday	10.30 am - 12 noon
Carers of school-aged children with additional needs	Let's Unite Outdoors	To be confirmed		Seasonal	Please call the Office
Carers of school-aged children with additional needs	Let's Unite at Number 4	Unite Carers, 4 Bridge St, Tiverton	Jenny	1 st Wednesday	9.30 am - 11.30 am
Dementia Carers	Culm Valley Oasis	Padbrook Park Hotel, Cullompton	Audrey & Veronica	3 rd Monday	2.30 pm - 4 pm
Dementia Carers	Exe Valley Oasis	Unite Carers, 4 Bridge St, Tiverton	Denise & Fiona	2 nd Thursday	10.30 am
Dementia Carers and Cared-for-people	A Different Journey Support Group	Unite Carers, 4 Bridge St, Tiverton	Fiona	1 st Tuesday	10.30am – 12 noon
Dementia Carers and Cared-for-people	Tiverton Forget Me Not Cafe	Cherith Hall, Tiverton	Denise & Fiona	3 rd Tuesday	2 pm to 3.30 pm
Former Carers	Tiverton and Cull Ex-Carers Lunch Group	Locations change monthly – Please call the office	Veronica	1 st Tuesday	12 noon

SAFE STOP SITTING SERVICE

During 2023 we had two Safe Stop groups running. One in Tiverton at the Cherith Church Venue which is still very much alive. The other was in Witheridge in the village hall. Although we had good attendance in Witheridge, the venue didn't work out so we therefore decided to stop running this group.

The group held in Cherith Church, (which is a very good venue in all ways), is held on the 2nd and 4th Wednesdays of the month from 10 am until 12.30pm. From September we are running it from 10.30 am until 1 pm to allow carers a little extra time in the mornings to get up and out.

The group is for the carers loved one to attend. We often call it a 'coffee morning' or 'social group' and not a sitting service which I think promotes the cared-for persons dignity a little better. The group's intention is for the 'cared-for person' to be well catered for with refreshments, conversation, fun, stimulation and a choice of what they would like to do. All of this whilst their carer gets a little respite for the morning to shop, go for coffee or to the dentist, hairdressers or just sit with a newspaper quietly. Carers are very welcome to stay and have a fun time with us all if they wish.

We have a wide variety of activities going on, mostly aimed at having fun through stimulation both of mind and body. We have entertainers visit with music, song and quizzes about an amazing array of old household objects. We play games – cards, dominos, carpet boules, golf, curling, bowling, quoits, chair football for example. At times we do a little craft, test our knowledge with a quiz or working out riddles and we giggle over funny jokes and stories. There is a lot of banter and fun.

The volunteer team are amazing and an important part of the whole session bringing much care and love to all and adding greatly to the laughter and joy.

At the moment, we have 4 regular attendees, and it would be great to double that number. There is a small charge of £10 a session to help cover costs and need for experienced staff on hand in safeguarding and first aid. Everyone has great fun, have become friends and look forward to the sessions.

Please call the office for further information.

Jenny Tower

Group facilitator

UNITE - CARERS IN MID DEVON

FINANCIAL STATEMENTS

YEAR ENDED 31 MARCH 2024

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CHARITY NUMBER 1099188
COMPANY NUMBER 04779388

UNITE - CARERS IN MID DEVON
REFERENCE AND ADMINISTRATION DETAILS

Registered charity number	1099188
Company number	04779388
Charity's principal address	2 Bridge Street Tiverton Devon EX16 5LY
Trustees	Bernice Philbrick (Chair) Pat Eardley Jenny Baker (resigned December 2023) Tina Webber Natalie Lee (resigned July 2023) Jack Bukin Paul Fitzmaurice Stephanie Hart (appointed October 2023)
Independent examiner	Mrs M Hutchings Apsleys Chartered Accountants 21 Bampton Street Tiverton Devon EX16 6AA
Bankers	CAF Bank Limited PO Box 289 West Malling Kent ME19 4TA

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2024

The Trustees present their report and the financial statements of the charity for the year ended 31 March 2024. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

OBJECTIVES AND ACTIVITIES

Summary of the objects of the charity set out in its governing document

To promote any charitable purpose for the benefit of unpaid Carers who look after someone who depends upon them in the Mid Devon area.

Summary of the main activities in relation to these objectives

Unite Carers provides advice - face to face, by telephone and by e-mail. Unite Carers' volunteers visit Carers at home to provide "befriending" support and can also provide regular telephone support calls and transport for essential journeys as well as IT support and a group sitting service to allow carers to get respite from their caring role. A specialist "Forget Me Not" cafe for people with dementia and their Carers operates once a month in Tiverton. "Oasis" peer support groups for carers of people with dementia are held monthly in Tiverton and Cullompton. Other general and specialist Carer Support Groups run every month in various locations to provide carers with the opportunities for peer support such as the Let's Unite Peer Support and Outdoor Groups which supports families with children with autism.

The charity currently has 56 trained volunteers who help to provide our services and who are vital to Unite Carers. The contribution they make in supporting Carers is invaluable: Supporting the office, helping with Carers' groups, sending out invitations, acting as first-stage mentors, phoning Carers at home for a friendly chat and visiting Carers to provide social support and practical assistance. The charity also supports Ex-Carers.

The Trustees have regard to the Charity Commission guidance on public benefit and believe this is achieved via the charity's objectives, activities and good governance.

ACHIEVEMENTS AND PERFORMANCE

Summary of the main achievements of the charity during the year

We now have 14 monthly support groups with around 125 attendances per month. 52 carers receive face to face befriending or support, including our free counselling service, IT support and form filling services. At the end of the year, we had 351 Carers on our Database. All receive our Newsletters, the majority by e-mail.

Support for Adult Carers – Volunteer support continues, with Carers benefiting from home-visits, meeting for coffee or receiving telephone support services as well as support groups, IT, form filling, bereavement support and counselling.

Support Groups have continued to provide respite breaks and opportunities for Carers across Mid Devon.

The 'Forget Me Not' Cafe is held monthly in Tiverton with increasing support and numbers. People with dementia and their Carers are able to enjoy a pleasant social afternoon with tea, cakes and chat and help and advice, with support from a Devon Carers Ambassador and sometimes with chats from professionals. Our newest group "A Different Journey" offers support for carers and the cared-for recently diagnosed with dementia.

The "Oasis" support groups, for dementia carers, are held monthly in Tiverton and Cullompton. We hold Support groups for all carers in Tiverton, Cullompton, Bampton and Uffculme areas. We are also pleased to continue to support the monthly Ex-Carers Lunch.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2024

Sitting Service

As planned, we launched our Sitting Service in Witheridge in April 2023 but due to lack of attendees it folded in January 2024. Our Tiverton Sitting Service continues to operate twice a month.

Counselling Service

Our free counselling service is in great demand with 60 sessions provided to unpaid carers throughout the year.

Publicity and Promotion

We welcome invitations to promote our services for Carers and during this year we have continued to work with other groups to provide information stands at local events.

Further Development

We run specific training courses for volunteers wishing to support Adult Carers. We continue to strengthen our services to Carers through the further development of our team of volunteers and expansion of our groups and services. Our staff receive appropriate updated training for their roles.

FINANCIAL REVIEW

Result for the year

The financial statements show net surplus for the year of £19,760 (2023: net deficit of £1,810).

Restricted funds at the year end total £nil (2023: £5,180).

Designated funds at the year end total £1,267 (2023: £37,324)

Unrestricted funds at the year end total £83,881 (2023: £22,884)

Brief summary of the charity's policy on reserves

Sufficient funds should always be available, equivalent to at least six months of operational costs to meet all commitments and allow for effective transition of Carer support, should the need arise. Unite holds no fixed property assets and all other assets (equipment, etc.) are written off in the year of purchase.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Type of governing document

Memorandum and Articles of Association

How the charity is constituted

Company limited by Guarantee

Additional governance issues

Trustees are invited to serve from existing volunteers who are usually Carers, ex-Carers or supporters of the organisation. We are obliged to have at least one third of our Trustees as experienced Carers as we need to ensure that our organisation is truly 'Carer-led'. Potential Trustees meet with the Chair and another trustee for a discussion about the role, the charity, its objectives and its position to date, plus an idea of what is expected of them. If the candidate is still interested they will be asked to attend a Trustee meeting as an observer and thereafter, both parties being in favour, will be voted onto the Board. All new Trustees are asked to visit the Charities Commission website and thoroughly read 'The Essential Trustee' which describes the roles and responsibilities of Trustees as well as undertake on-line training for new trustees. They will receive a Volunteers handbook at the time of joining Unite which contains much useful information. In accordance with the Charity Commission's requirements, the Trustees regularly review the risks to which the organisation might be exposed.

OTHER OPTIONAL INFORMATION

This year saw the appointment of 1 new Trustee and the resignation of 2.

Our General Manager reports to the Board of Trustees the Charity's financial status and funding application situation which is discussed openly at the monthly Trustee meetings so that reasonable and prudent decisions on the charity's funding and expenditure may be made.

We do not receive any direct local or central funding to support our operations and rely mainly on grants from charitable trusts and foundations. We are lucky enough to be in receipt of a number of donations from local individuals and organisations who recognise the good work that we do. Funding Unite's operations continues to be challenging due to the economic crisis.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2024

Statement of trustees' responsibilities

The trustees (who are also directors of Unite – Carers in Mid Devon for the purposes of company law) are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Account Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees 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 the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2015 (FRS 102);
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report has been prepared taking advantage of the small companies exemption of Section 415A of the Companies Act 2006.

Approval

This report was approved by the board of Directors and Trustees on 09/09/24
and signed on its behalf.

..... 

MRS B PHILBRICK (CHAIR)

**INDEPENDENT EXAMINERS REPORT TO THE TRUSTEES
ON THE UNAUDITED FINANCIAL STATEMENTS OF
UNITE - CARERS IN MID DEVON**

I report to the charity trustees on my examination of the accounts of the company for the year ended 31 March 2024 which are set out on pages 6 to 12.

Respective responsibilities of trustees and examiner

As the charity 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'),

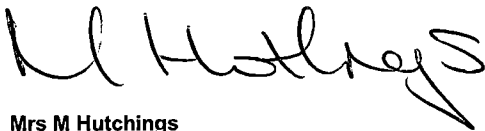
Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). 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 that in any material respect:

- 1 accounting records are not kept in respect of the company as required by section 386 of the 2006 Act; or
- 2 accounting records 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.



**Mrs M Hutchings
Apsleys
Chartered Accountants**

**21 Bampton Street
Tiverton EX16 6AA**

Date: 11/9/2024

UNITE - CARERS IN MID DEVON
STATEMENT OF FINANCIAL ACTIVITIES
(INCORPORATING INCOME AND EXPENDITURE ACCOUNT)
YEAR TO 31 MARCH 2024

Notes	Unrestricted £	Designated £	Restricted £	Total 2024 £	Total 2023 £
Income and endowments from:					
Donations	13,487	38	-	13,525	7,242
Grants	72,822	4,938	-	77,760	60,434
Income from contracts	-	-	-	-	4,376
Interest	2,777	-	-	2,777	942
Other income	28	1,310	-	1,338	2,890
Total income and endowments	89,114	6,286	-	95,400	75,884
Expenditure on:					
Charitable activities	2 8,257	62,203	5,180	75,640	77,694
Total expenditure	8,257	62,203	5,180	75,640	77,694
Net income / (expenditure) before transfers	80,857	(55,917)	(5,180)	19,760	(1,810)
Transfers between funds	(19,860)	19,860	-	-	-
Net income / (expenditure) after transfers	60,997	(36,057)	(5,180)	19,760	(1,810)
Fund balances at 1 April 2023	22,884	37,324	5,180	65,388	67,198
Fund balances at 31 March 2024	83,881	1,267	-	85,148	65,388

The notes on pages 8 to 12 form part of these financial statements.

UNITE - CARERS IN MID DEVON

BALANCE SHEET

31 MARCH 2024

	Notes	£	2024 £	£	2023 £
Non-current assets					
Tangible Fixed assets	7		-		-
Current assets					
Debtors	8	175		7,355	
Cash at bank and in hand		<u>86,226</u>		<u>58,790</u>	
		86,401		66,145	
Creditors: Amounts falling due within one year	9	<u>1,253</u>		<u>757</u>	
Total assets less current liabilities			<u>85,148</u>		<u>65,388</u>
Net assets			<u>85,148</u>		<u>65,388</u>
Income funds					
Restricted funds	10		-		5,180
Unrestricted funds					
Designated funds	11	1,267		37,324	
Other charitable funds		<u>83,881</u>		<u>22,884</u>	
		<u>85,148</u>		<u>65,388</u>	

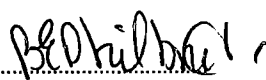
For the year ending 31 March 2024 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit of its accounts for the year in question in accordance with Section 476;
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on 09/09/24 and signed on their behalf by:


MRS B PHILBRICK (CHAIR)

The notes on pages 8 to 12 form part of these financial statements.

Company number 04779388

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

1 Accounting policies

1.1 General information and basis of preparation

Unite - Carers in Mid Devon is a Private Limited Company by guarantee and Charity registered in England within the United Kingdom.

The charity constitutes a public benefit entity as defined by FRS 102. 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) issued on 16 July 2014 (as updated through Update Bulletin 1 published on 2 February 2016), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice as it applies from 1 January 2015.

The charity has applied Update Bulletin 1 as published on 2 February 2016 and does not include a cash flow statement on the grounds that it is applying FRS 102 Section 1A

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of each designated fund is set out in the notes to the financial statements.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Income recognition

All incoming resources are included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

For donations to be recognised the charity will have been notified of the amounts and the settlement date in writing. If there are conditions attached to the donation and this requires a level of performance before entitlement can be obtained then income is deferred until those conditions are fully met or the fulfilment of those conditions is within the control of the charity and it is probable that they will be fulfilled.

No amount is included in the financial statements for volunteer time in line with the SORP (FRS 102). Further detail is given in the Trustees' Annual Report.

Investment income represents bank interest and is accounted for when received.

Government grants are recognised at the fair value of the asset received or receivable when there is reasonable assurance that the grant conditions will be met and the grants will be received.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

1.4 Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably. It is categorised under the following headings:

- Costs of raising funds;
- Expenditure on charitable activities; and
- Other expenditure represents those items not falling into the categories above.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

1.5 Tangible fixed assets and depreciation

Depreciation is provided at rates calculated to write off the cost less residual value of each asset over its expected useful life, as follows;

Computer equipment - 1 year straight line

1.6 Debtors and creditors receivable / payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

1.7 Cash

Cash and cash equivalents are basic financial assets and include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.8 Pensions

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

2. Analysis of expenditure on charitable activities

	Unrestricted	Designated	Restricted	2024	2023
	£	£	£	£	£
Staff and Contract Salaries	17,639	34,920	-	52,559	52,659
Pension	706	1,397	-	2,103	2,042
Staff expenses	37	96	-	133	655
Training	65	-	-	65	-
Volunteers expenses	292	1,328	1,663	3,283	2,349
Trustee expenses	21	-	-	21	45
Rent and room hire	7,600	623	785	9,008	8,627
Rates	289	-	-	289	230
Light, heat and power	1,511	-	22	1,533	1,208
Insurance	475	-	-	475	443
Repairs and renewals	445	-	-	445	251
Printing, postage and stationery	227	906	-	1,133	778
Advertising	-	-	-	-	1,560
Telephone	1,903	-	-	1,903	1,843
Accountancy fees	1,200	-	-	1,200	1,500
Payroll fees	-	-	-	-	378
Professional fees	-	-	-	-	1,292
Sundry expenses	556	634	-	1,190	744
Bank charges	60	-	-	60	71
Group outings	-	230	-	230	180
Subscriptions	-	10	-	10	10
Depreciation	-	-	-	-	829
	33,026	40,144	2,470	75,640	77,694
Management fees	(24,769)	22,059	2,710	-	-
	8,257	62,203	5,180	75,640	77,694

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

3. Independent examiners fees	2024	2023
	£	£
Preparation of statutory accounts	900	1,200
Examination fee	300	300
	<u>1,200</u>	<u>1,500</u>

4. Trustees' emoluments	2024	2023
	£	£
Trustees remuneration	Nil	Nil
Expenses reimbursed - various expenses	21	45

Number of trustees to whom expenses were reimbursed	<u>1</u>	<u>2</u>
---	----------	----------

5. Staff costs and employee benefits	2024	2023
	£	£
Wages and salaries	52,559	52,659
Social Security	-	-
Defined contribution pension costs	2,103	2,042
	<u>54,662</u>	<u>54,701</u>

Redundancy payments	<u>-</u>	<u>-</u>
---------------------	----------	----------

The average number of employees during the year was	<u>2</u>	<u>3</u>
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No employee received emoluments above £60,000

6. Pension Costs

The company operated a defined contribution pension scheme in respect of employees. The scheme and its assets are held by independent managers. The pension charge represents contributions due from the company and amounted to £2,103 (2023: £2,042)

7. Tangible fixed assets

	Computer Equipment £
Cost	
At 1 April 2023	2,319
Additions	-
Disposals	-
At 31 March 2024	<u>2,319</u>
Depreciation	
At 1 April 2023	2,319
Charge for the Year	-
Eliminated on disposal	-
At 31 March 2024	<u>2,319</u>
Net Book Value	
At 31 March 2023	<u>-</u>
At 31 March 2024	<u>-</u>

8. Debtors: amounts falling due within one year	2024	2023
	£	£
Trade debtors	18	6,880
Prepayments	157	475
	<u>175</u>	<u>7,355</u>

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

9. Creditors: amounts falling due within one year	2024	2023
	£	£
Trade creditors	588	113
Other taxes and social security	665	644
	<u>1,253</u>	<u>757</u>

10. Restricted funds	2023	Incoming	Outgoing	Transfers	2024
	£	£	£	£	£
Sitting Service	<u>5,180</u>	<u>-</u>	<u>5,180</u>	<u>-</u>	<u>-</u>

Restricted funds	2022	Incoming	Outgoing	Transfers	2023
	£	£	£	£	£
KWC Project	10,611	4,411	15,022	-	-
Sitting Service	<u>2,071</u>	<u>10,999</u>	<u>1,246</u>	<u>(6,644)</u>	<u>5,180</u>
	<u>12,682</u>	<u>15,410</u>	<u>16,268</u>	<u>(6,644)</u>	<u>5,180</u>

KWC Project - This project was supported by Westbank with a small contribution towards the running costs for Monthly Club Nights and Outings. Other funding comes from donations and from grants through Charitable Trusts and Foundations. The project came to an end in December 2021.

Sitting service - A dedicated sitting service under the auspices of Westbank which allows carers to get out of the house for short periods with volunteers stepping in.

11. Designated funds

The income funds include the following designated funds which have been set aside out of unrestricted funds by the directors for specific purposes

	2023	New Designations	Utilised	Transfers	2024
	£	£	£	£	£
Carers support group	-	6,286	17,225	12,206	1,267
Volunteer Support for Adult Carers	<u>37,324</u>	<u>-</u>	<u>44,978</u>	<u>7,654</u>	<u>-</u>
	<u>37,324</u>	<u>6,286</u>	<u>62,203</u>	<u>19,860</u>	<u>1,267</u>

	2022	New Designations	Utilised	Transfers	2023
	£	£	£	£	£
Carers support group	138	5,138	3,648	(1,628)	-
Volunteer Support for Adult Carers	<u>39,698</u>	<u>15,539</u>	<u>4,624</u>	<u>(13,289)</u>	<u>37,324</u>
	<u>39,836</u>	<u>20,677</u>	<u>8,272</u>	<u>(14,917)</u>	<u>37,324</u>

Carer Support Groups – This funding is for the running of Support Groups throughout Mid Devon including the Forget-Me-Not Café, Sitting Service and Oasis groups for the carers of people with memory difficulties.

Volunteer Support for Adult Carers - This funding is for the volunteer support to Adult Carers including befriending, telephone outreach, bereavement and essential journeys support.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

12. Analysis of net assets between funds

	Unrestricted funds	Restricted funds	Total funds
	£	£	£
Fund balances at 31 March 2024 are represented by:			
Current assets	86,401	-	86,401
Current liabilities	(1,253)	-	(1,253)
	<u>85,148</u>	<u>-</u>	<u>85,148</u>

13. Related party transactions

There have been no related party transactions in the year.

UNITE - CARERS IN MID DEVON

FINANCIAL STATEMENTS

YEAR ENDED 31 MARCH 2024

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COMPANY NUMBER 04779388

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Independent examiner	Mrs M Hutchings Apsleys Chartered Accountants 21 Bampton Street Tiverton Devon EX16 6AA
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UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2024

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Summary of the objects of the charity set out in its governing document

To promote any charitable purpose for the benefit of unpaid Carers who look after someone who depends upon them in the Mid Devon area.

Summary of the main activities in relation to these objectives

Unite Carers provides advice - face to face, by telephone and by e-mail. Unite Carers' volunteers visit Carers at home to provide "befriending" support and can also provide regular telephone support calls and transport for essential journeys as well as IT support and a group sitting service to allow carers to get respite from their caring role. A specialist "Forget Me Not" cafe for people with dementia and their Carers operates once a month in Tiverton. "Oasis" peer support groups for carers of people with dementia are held monthly in Tiverton and Cullompton. Other general and specialist Carer Support Groups run every month in various locations to provide carers with the opportunities for peer support such as the Let's Unite Peer Support and Outdoor Groups which supports families with children with autism.

The charity currently has 56 trained volunteers who help to provide our services and who are vital to Unite Carers. The contribution they make in supporting Carers is invaluable: Supporting the office, helping with Carers' groups, sending out invitations, acting as first-stage mentors, phoning Carers at home for a friendly chat and visiting Carers to provide social support and practical assistance. The charity also supports Ex-Carers.

The Trustees have regard to the Charity Commission guidance on public benefit and believe this is achieved via the charity's objectives, activities and good governance.

ACHIEVEMENTS AND PERFORMANCE

Summary of the main achievements of the charity during the year

We now have 14 monthly support groups with around 125 attendances per month. 52 carers receive face to face befriending or support, including our free counselling service, IT support and form filling services. At the end of the year, we had 351 Carers on our Database. All receive our Newsletters, the majority by e-mail.

Support for Adult Carers – Volunteer support continues, with Carers benefiting from home-visits, meeting for coffee or receiving telephone support services as well as support groups, IT, form filling, bereavement support and counselling.

Support Groups have continued to provide respite breaks and opportunities for Carers across Mid Devon.

The 'Forget Me Not' Cafe is held monthly in Tiverton with increasing support and numbers. People with dementia and their Carers are able to enjoy a pleasant social afternoon with tea, cakes and chat and help and advice, with support from a Devon Carers Ambassador and sometimes with chats from professionals. Our newest group "A Different Journey" offers support for carers and the cared-for recently diagnosed with dementia.

The "Oasis" support groups, for dementia carers, are held monthly in Tiverton and Cullompton. We hold Support groups for all carers in Tiverton, Cullompton, Bampton and Uffculme areas. We are also pleased to continue to support the monthly Ex-Carers Lunch.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2024

Sitting Service

As planned, we launched our Sitting Service in Witheridge in April 2023 but due to lack of attendees it folded in January 2024. Our Tiverton Sitting Service continues to operate twice a month.

Counselling Service

Our free counselling service is in great demand with 60 sessions provided to unpaid carers throughout the year.

Publicity and Promotion

We welcome invitations to promote our services for Carers and during this year we have continued to work with other groups to provide information stands at local events.

Further Development

We run specific training courses for volunteers wishing to support Adult Carers. We continue to strengthen our services to Carers through the further development of our team of volunteers and expansion of our groups and services. Our staff receive appropriate updated training for their roles.

FINANCIAL REVIEW

Result for the year

The financial statements show net surplus for the year of £19,760 (2023: net deficit of £1,810).

Restricted funds at the year end total £nil (2023: £5,180).

Designated funds at the year end total £1,267 (2023: £37,324)

Unrestricted funds at the year end total £83,881 (2023: £22,884)

Brief summary of the charity's policy on reserves

Sufficient funds should always be available, equivalent to at least six months of operational costs to meet all commitments and allow for effective transition of Carer support, should the need arise. Unite holds no fixed property assets and all other assets (equipment, etc.) are written off in the year of purchase.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Type of governing document

Memorandum and Articles of Association

How the charity is constituted

Company limited by Guarantee

Additional governance issues

Trustees are invited to serve from existing volunteers who are usually Carers, ex-Carers or supporters of the organisation. We are obliged to have at least one third of our Trustees as experienced Carers as we need to ensure that our organisation is truly 'Carer-led'. Potential Trustees meet with the Chair and another trustee for a discussion about the role, the charity, its objectives and its position to date, plus an idea of what is expected of them. If the candidate is still interested they will be asked to attend a Trustee meeting as an observer and thereafter, both parties being in favour, will be voted onto the Board. All new Trustees are asked to visit the Charities Commission website and thoroughly read 'The Essential Trustee' which describes the roles and responsibilities of Trustees as well as undertake on-line training for new trustees. They will receive a Volunteers handbook at the time of joining Unite which contains much useful information. In accordance with the Charity Commission's requirements, the Trustees regularly review the risks to which the organisation might be exposed.

OTHER OPTIONAL INFORMATION

This year saw the appointment of 1 new Trustee and the resignation of 2.

Our General Manager reports to the Board of Trustees the Charity's financial status and funding application situation which is discussed openly at the monthly Trustee meetings so that reasonable and prudent decisions on the charity's funding and expenditure may be made.

We do not receive any direct local or central funding to support our operations and rely mainly on grants from charitable trusts and foundations. We are lucky enough to be in receipt of a number of donations from local individuals and organisations who recognise the good work that we do. Funding Unite's operations continues to be challenging due to the economic crisis.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2024

Statement of trustees' responsibilities

The trustees (who are also directors of Unite – Carers in Mid Devon for the purposes of company law) are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Account Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees 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 the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2015 (FRS 102);
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report has been prepared taking advantage of the small companies exemption of Section 415A of the Companies Act 2006.

Approval

This report was approved by the board of Directors and Trustees on 09/09/24
and signed on its behalf.

..... 

MRS B PHILBRICK (CHAIR)

**INDEPENDENT EXAMINERS REPORT TO THE TRUSTEES
ON THE UNAUDITED FINANCIAL STATEMENTS OF
UNITE - CARERS IN MID DEVON**

I report to the charity trustees on my examination of the accounts of the company for the year ended 31 March 2024 which are set out on pages 6 to 12.

Respective responsibilities of trustees and examiner

As the charity 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'),

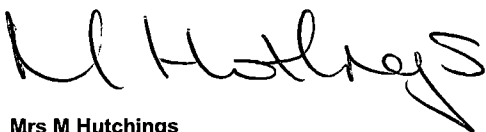
Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). 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 that in any material respect:

- 1 accounting records are not kept in respect of the company as required by section 386 of the 2006 Act; or
- 2 accounting records 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.



**Mrs M Hutchings
Apsleys
Chartered Accountants**

**21 Bampton Street
Tiverton EX16 6AA**

Date: 11/9/2024

UNITE - CARERS IN MID DEVON
STATEMENT OF FINANCIAL ACTIVITIES
(INCORPORATING INCOME AND EXPENDITURE ACCOUNT)
YEAR TO 31 MARCH 2024

Notes	Unrestricted £	Designated £	Restricted £	Total 2024 £	Total 2023 £
Income and endowments from:					
Donations	13,487	38	-	13,525	7,242
Grants	72,822	4,938	-	77,760	60,434
Income from contracts	-	-	-	-	4,376
Interest	2,777	-	-	2,777	942
Other income	28	1,310	-	1,338	2,890
Total income and endowments	89,114	6,286	-	95,400	75,884
Expenditure on:					
Charitable activities	2 8,257	62,203	5,180	75,640	77,694
Total expenditure	8,257	62,203	5,180	75,640	77,694
Net income / (expenditure) before transfers	80,857	(55,917)	(5,180)	19,760	(1,810)
Transfers between funds	(19,860)	19,860	-	-	-
Net income / (expenditure) after transfers	60,997	(36,057)	(5,180)	19,760	(1,810)
Fund balances at 1 April 2023	22,884	37,324	5,180	65,388	67,198
Fund balances at 31 March 2024	83,881	1,267	-	85,148	65,388

The notes on pages 8 to 12 form part of these financial statements.

UNITE - CARERS IN MID DEVON

BALANCE SHEET

31 MARCH 2024

	Notes	£	2024 £	£	2023 £
Non-current assets					
Tangible Fixed assets	7		-		-
Current assets					
Debtors	8	175		7,355	
Cash at bank and in hand		<u>86,226</u>		<u>58,790</u>	
		86,401		66,145	
Creditors: Amounts falling due within one year	9	<u>1,253</u>		<u>757</u>	
Total assets less current liabilities			<u>85,148</u>		<u>65,388</u>
Net assets			<u>85,148</u>		<u>65,388</u>
Income funds					
Restricted funds	10		-		5,180
Unrestricted funds					
Designated funds	11	1,267		37,324	
Other charitable funds		<u>83,881</u>		<u>22,884</u>	
		<u>85,148</u>		<u>65,388</u>	

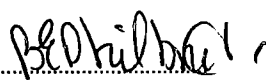
For the year ending 31 March 2024 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit of its accounts for the year in question in accordance with Section 476;
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on 09/09/24 and signed on their behalf by:


MRS B PHILBRICK (CHAIR)

The notes on pages 8 to 12 form part of these financial statements.

Company number 04779388

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

1 Accounting policies

1.1 General information and basis of preparation

Unite - Carers in Mid Devon is a Private Limited Company by guarantee and Charity registered in England within the United Kingdom.

The charity constitutes a public benefit entity as defined by FRS 102. 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) issued on 16 July 2014 (as updated through Update Bulletin 1 published on 2 February 2016), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice as it applies from 1 January 2015.

The charity has applied Update Bulletin 1 as published on 2 February 2016 and does not include a cash flow statement on the grounds that it is applying FRS 102 Section 1A

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of each designated fund is set out in the notes to the financial statements.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Income recognition

All incoming resources are included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

For donations to be recognised the charity will have been notified of the amounts and the settlement date in writing. If there are conditions attached to the donation and this requires a level of performance before entitlement can be obtained then income is deferred until those conditions are fully met or the fulfilment of those conditions is within the control of the charity and it is probable that they will be fulfilled.

No amount is included in the financial statements for volunteer time in line with the SORP (FRS 102). Further detail is given in the Trustees' Annual Report.

Investment income represents bank interest and is accounted for when received.

Government grants are recognised at the fair value of the asset received or receivable when there is reasonable assurance that the grant conditions will be met and the grants will be received.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

1.4 Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably. It is categorised under the following headings:

- Costs of raising funds;
- Expenditure on charitable activities; and
- Other expenditure represents those items not falling into the categories above.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

1.5 Tangible fixed assets and depreciation

Depreciation is provided at rates calculated to write off the cost less residual value of each asset over its expected useful life, as follows;

Computer equipment - 1 year straight line

1.6 Debtors and creditors receivable / payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

1.7 Cash

Cash and cash equivalents are basic financial assets and include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.8 Pensions

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

2. Analysis of expenditure on charitable activities

	Unrestricted	Designated	Restricted	2024	2023
	£	£	£	£	£
Staff and Contract Salaries	17,639	34,920	-	52,559	52,659
Pension	706	1,397	-	2,103	2,042
Staff expenses	37	96	-	133	655
Training	65	-	-	65	-
Volunteers expenses	292	1,328	1,663	3,283	2,349
Trustee expenses	21	-	-	21	45
Rent and room hire	7,600	623	785	9,008	8,627
Rates	289	-	-	289	230
Light, heat and power	1,511	-	22	1,533	1,208
Insurance	475	-	-	475	443
Repairs and renewals	445	-	-	445	251
Printing, postage and stationery	227	906	-	1,133	778
Advertising	-	-	-	-	1,560
Telephone	1,903	-	-	1,903	1,843
Accountancy fees	1,200	-	-	1,200	1,500
Payroll fees	-	-	-	-	378
Professional fees	-	-	-	-	1,292
Sundry expenses	556	634	-	1,190	744
Bank charges	60	-	-	60	71
Group outings	-	230	-	230	180
Subscriptions	-	10	-	10	10
Depreciation	-	-	-	-	829
	33,026	40,144	2,470	75,640	77,694
Management fees	(24,769)	22,059	2,710	-	-
	8,257	62,203	5,180	75,640	77,694

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

3. Independent examiners fees	2024	2023
	£	£
Preparation of statutory accounts	900	1,200
Examination fee	300	300
	<u>1,200</u>	<u>1,500</u>

4. Trustees' emoluments	2024	2023
	£	£
Trustees remuneration	Nil	Nil
Expenses reimbursed - various expenses	21	45

Number of trustees to whom expenses were reimbursed	<u>1</u>	<u>2</u>
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5. Staff costs and employee benefits	2024	2023
	£	£
Wages and salaries	52,559	52,659
Social Security	-	-
Defined contribution pension costs	2,103	2,042
	<u>54,662</u>	<u>54,701</u>

Redundancy payments	<u>-</u>	<u>-</u>
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The average number of employees during the year was	<u>2</u>	<u>3</u>
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No employee received emoluments above £60,000

6. Pension Costs

The company operated a defined contribution pension scheme in respect of employees. The scheme and its assets are held by independent managers. The pension charge represents contributions due from the company and amounted to £2,103 (2023: £2,042)

7. Tangible fixed assets

	Computer Equipment £
Cost	
At 1 April 2023	2,319
Additions	-
Disposals	-
At 31 March 2024	<u>2,319</u>
Depreciation	
At 1 April 2023	2,319
Charge for the Year	-
Eliminated on disposal	-
At 31 March 2024	<u>2,319</u>
Net Book Value	
At 31 March 2023	<u>-</u>
At 31 March 2024	<u>-</u>

8. Debtors: amounts falling due within one year	2024	2023
	£	£
Trade debtors	18	6,880
Prepayments	157	475
	<u>175</u>	<u>7,355</u>

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

9. Creditors: amounts falling due within one year	2024	2023
	£	£
Trade creditors	588	113
Other taxes and social security	665	644
	<u>1,253</u>	<u>757</u>

10. Restricted funds	2023	Incoming	Outgoing	Transfers	2024
	£	£	£	£	£
Sitting Service	<u>5,180</u>	<u>-</u>	<u>5,180</u>	<u>-</u>	<u>-</u>

Restricted funds	2022	Incoming	Outgoing	Transfers	2023
	£	£	£	£	£
KWC Project	10,611	4,411	15,022	-	-
Sitting Service	<u>2,071</u>	<u>10,999</u>	<u>1,246</u>	<u>(6,644)</u>	<u>5,180</u>
	<u>12,682</u>	<u>15,410</u>	<u>16,268</u>	<u>(6,644)</u>	<u>5,180</u>

KWC Project - This project was supported by Westbank with a small contribution towards the running costs for Monthly Club Nights and Outings. Other funding comes from donations and from grants through Charitable Trusts and Foundations. The project came to an end in December 2021.

Sitting service - A dedicated sitting service under the auspices of Westbank which allows carers to get out of the house for short periods with volunteers stepping in.

11. Designated funds

The income funds include the following designated funds which have been set aside out of unrestricted funds by the directors for specific purposes

	2023	New Designations	Utilised	Transfers	2024
	£	£	£	£	£
Carers support group	-	6,286	17,225	12,206	1,267
Volunteer Support for Adult Carers	<u>37,324</u>	<u>-</u>	<u>44,978</u>	<u>7,654</u>	<u>-</u>
	<u>37,324</u>	<u>6,286</u>	<u>62,203</u>	<u>19,860</u>	<u>1,267</u>

	2022	New Designations	Utilised	Transfers	2023
	£	£	£	£	£
Carers support group	138	5,138	3,648	(1,628)	-
Volunteer Support for Adult Carers	<u>39,698</u>	<u>15,539</u>	<u>4,624</u>	<u>(13,289)</u>	<u>37,324</u>
	<u>39,836</u>	<u>20,677</u>	<u>8,272</u>	<u>(14,917)</u>	<u>37,324</u>

Carer Support Groups – This funding is for the running of Support Groups throughout Mid Devon including the Forget-Me-Not Café, Sitting Service and Oasis groups for the carers of people with memory difficulties.

Volunteer Support for Adult Carers - This funding is for the volunteer support to Adult Carers including befriending, telephone outreach, bereavement and essential journeys support.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2024

12. Analysis of net assets between funds

	Unrestricted funds	Restricted funds	Total funds
	£	£	£
Fund balances at 31 March 2024 are represented by:			
Current assets	86,401	-	86,401
Current liabilities	(1,253)	-	(1,253)
	<u>85,148</u>	<u>-</u>	<u>85,148</u>

13. Related party transactions

There have been no related party transactions in the year.