

Age UK Hull Annual report 2023/24

Supporting local people in later life



Contents

Introduction by the Chair	4
Values and Behaviours	5
Age UK Pathway for a Gratifying Sustainable and Enjoyable Later Life	6
Age UK Hull and East Yorkshire Services	7
1. Positive Activities	7
2. Home Support	19
3. Befriending	21
4. Information and Advice	23
Trustees' Report	28
Objectives and Activities	28
Financial Review	29
Structure, Governance and Management	29
Statement of Trustees' Responsibilities	31
Statement of Financial Activities	32
Balance Sheet	33
Cash Flow Statement	34
Notes to the Cash Flow Statement	35
Notes to the Financial Statements	36
Detailed Statement of Financial Activities	42

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Our vision

Older people can live happy independent later lives.

”

“

Our mission

Ensuring local older people get the services and support they need.

”

Introduction by the Chair

2023/24 has continued to see Age UK Hull and East Yorkshire strengthen the breadth and depth of its services for older people across the region.

The main highlights of the period are the Community Companions project, the growth of the Home Support service and our relocation plans.

Community Companions is a significant project for the charity to secure, and doing so clearly demonstrated to a major central government department (the Department for Culture Media and Sport - DCMS) that the charity is capable of delivering such a major programme. We know that barriers to transport are the single largest factor in tackling isolation and loneliness amongst older people and the project has enabled us to make significant progress in supporting older people to overcome these. It has also enabled us to learn more about supporting older members of the LGBTQ+I and BAME communities, and whilst this work is very much in its infancy it has already been recognised by Age UK (our national partner) as a model they want us to share across the nationwide Age UK network.

The Home Support service has grown significantly this year, exceeding all expectations. The broadening of the services offered and an unwavering commitment to service quality, along with the inherent trust customers have in the Age UK brand are the main factors behind the growth. And we have been able to successfully handle this level of growth because of our earlier decision to significantly invest in an appropriate CRM system.

The year has also seen us reach a decision to relocate the charity from what was only ever meant to be a post Covid temporary administrative hub in central Hull, to a fit for purpose building on Preston Road in East Hull. We see this move as a real seminal moment for the charity and as Chair I have every confidence that the team, our volunteers, partners and my fellow trustees will ensure the relocation is a success.

Whilst we have highlighted these aspects of our 2023/24 work, we are immensely proud of the rest of the work the whole charity continues to deliver in making life changing impacts for older people, and their carers/families. This report highlights all this work, not just reporting figures but also telling the stories of the difference this has made to people's lives.

This is a report upon the 2023/24 year that has passed, yet we are very much looking forward to the year ahead. 2024/25 sees us enter our 75th Jubilee year, complete the relocation, and deliver plans to achieve a number of externally assessed quality standards, all of which will play a significant role in securing partner and funder investment in our work.

The charity is in a good place, it is in good hands, we're very proud of what we achieved this year and we are looking forward to the year ahead.



Peter David Duffield LLB FCA
Chair of Trustees

Values and Behaviours

Values

At Age UK Hull and East Yorkshire (HEY), we do whatever it takes so that older people can live happy and independent later lives and get the services and support they need.

Our Age UK HEY values help us to do just that. They underpin everything we say and do, how we work with people, behave towards them and communicate.



Age UK Pathway for a Gratifying Sustainable and Enjoyable Later Life

The Age UK Pathway for a gratifying sustainable and enjoyable later life forms the focus of our service development, design and delivery around four key elements:



Age UK Hull and East Yorkshire Services

All of our activities are organised into 4 main themes:

1.

**Positive
Activities**

2.

**Home
Support**

3.

Befriending

4.

**Information
and Advice**



1. Positive Activities

This activity theme is all about our services that support older people to engage in activities that promote mental and physical well-being.

Older people can face many barriers to being engaged in their communities – for example the impact of age-related illnesses and medical issues can restrict mobility, and the loss of a life partner can have a devastating impact upon many aspects of life. And along with the continued Covid-19 legacy effects we continue to deal with many older people who are still very reluctant to leave the house, gather in larger groups and especially to travel independently.

However, delivering services and activities that are attractive and beneficial for older people to attend, and which are based in the heart of the communities in which they live are crucial factors in creating a reason for older people to “come out” of their homes. And we don’t just leave it there, we also support older people to overcome both the physical and emotional barriers they may have to leaving their homes.

Community Companions – Know Your Neighbourhood

This programme was the largest and most significant project Age UK Hull and East Yorkshire had secured in recent years.

It has 3 core aspects:

1

Community Companions (travel)

2

BAME

3

LGBTQ+i

Community Companions (travel) helps lonely and socially isolated older people reconnect with their communities by helping them feel more confident getting out and about and using transport – whether it is walking, bus, taxi or community transport.

The service matches lonely and isolated older people with a trained Community Companion volunteer. The aim of the service is to reduce loneliness and isolation amongst older people by helping them to reconnect with their local communities, their friends, and family. We support them to leave their homes using either public transport, community transport, taxis, walking or even cycling. We help older people address the barriers they face in leaving their homes, such as anxiety or a lack of confidence.

Our volunteer “Community Companions” accompany older people on journeys and provide empowering, gradual support to enable them to be able to take the journey alone. Support usually last 6-8 weeks and increases confidence levels, encourages independence and reduces the anxiety that many older people experience after prolonged periods of isolation.

In the 2023/24 period the Community Companions (travel) service launched in November 2023, yet managed to deliver:



28

Referrals



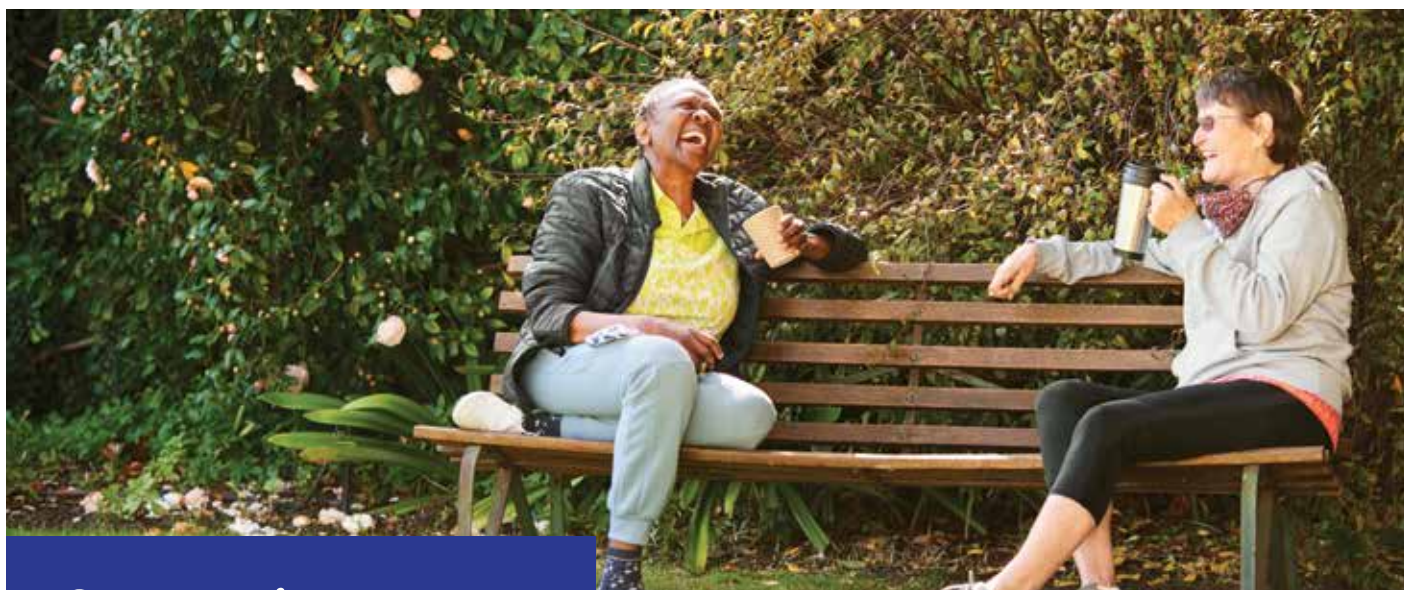
27

Clients joined the programme



36

Home visits were conducted



Community Companions (travel)

Case Study

BP was referred to us by the Health & wellbeing Coach at her local GP surgery as she wanted to develop the confidence to go out alone to a Social Group in the city.

BP had never married or had children, and her only companion was her little dog Chloe, who kept her company for many years and helped her through hip replacement surgery. Unfortunately, in November 2023 Chloe passed away, leaving BP still recovering at home alone with what she describes as 'no purpose'.

BP was initially referred to our Befriending service as she was lonely, however it became clear she lacked confidence getting out and about, so our Community Companions team stepped in. We visited her and assessed her needs and discussed and set some goals – the ultimate goal being to get to a Social Group.

We spent time discussing local bus routes, community transport and the use of taxis. With some support, mentoring and accompanied trips/travel opportunities BP now attends our weekly Streetlife group.



“ I am no longer lonely or isolated, I have made new friends and feel like I now have 'purpose' I'm eternally grateful to Age UK HEY.

BP

”



Community Companions (travel)

Case Study

Mr & Mrs G were referred individually by their daughter, who lives away and had heard about Age UK HEY services and our Community Companions programme on our website. She had become increasingly worried about her parents who had remained housebound since the Covid-19 pandemic.

We immediately arranged a home visit to Mr & Mrs G where we learned that Mrs G had become lonely at home, with her mental and physical health declining significantly over the last few years. Mr G was the only driver, so if she needed to go out she would need to ask him to take her, but she really wanted to be independent and to take herself to places.

“ Mr & Mrs G’s daughter couldn’t have been happier...”

Mum and Dad are so much better now. I believe that your interaction helped with this, they just needed someone from the outside to give them a kick! We cannot thank you enough.

And Mr G had also become isolated and as was upset and worried about Mrs G and her issues, and for himself he wanted to find social groups in the area to go to.

Support was delivered over a number of weeks and the change was amazing! With our support and encouragement we helped them achieve smaller goals at first which over time helped them both reach their ultimate goal.

Mrs G now has a mobility scooter and regularly attends a knit and natter group twice a week and has the confidence to use her scooter to shop on her own.

Mr G now attends regular Men in Shed sessions twice a week and has made a new friend whom he meets weekly on an evening to attend a quiz night.

This is an example of Community Companions intervention that did not need any volunteer input and shows that some people just need the confidence of somebody else letting them know ‘they can do it’.

Community Companions (BAME and LGBTQ+i) is focused upon bringing our expertise and knowledge about supporting older people and working alongside organisations that are embedded within the two communities of focus so we can help build their capacity and also reach older people in their communities.

Community Companions (BAME) worked closely with Hull Afro-Caribbean Association (HACA) and Women Accede (WA) – both organisations are well rooted and respected in their BAME communities. Working together we ran a series of regular drop-in sessions, advice surgeries and activities all of which successfully engaged with older BAME people and developed capacity to provide support and advice.

In the period:



5

Drop in Sessions



67

Attendees



10

Attendees at
Hull Christmas
meal



10

Attendees at
East Riding
Christmas meal



Community Companions (LGBTQ+i) enabled us to build connections and develop relationships with organisations which the community trusted. Whilst this took time great foundations were built and “The Next Chapter Book Group for the over 50’s LGBTQ+ community” was started. Advertised as being for older people who are passionate about literature that celebrates and explores the LGBTQ+ community, it provides a safe and welcoming space to discuss thought-provoking books whilst connecting with like-minded individuals.

2 book club sessions have been held so far (with dates set for another 12 months) – the first attracted 4 attendees with the second attracting 6 - clearly showing potential to grow in the future.

Social Groups

Our social groups are spread across the Hull and East Yorkshire region, held in venues which are accessible and in the heart of the communities which older people live. They provide the opportunity to meet, socialise and also access support and advice.

Working with volunteers and supporting other self-managed groups, 8 groups meet each week across the region, with future plans to grow even more.

In the period:

- 347 sessions were held
- 6,644 attendances were recorded
- 15 volunteers supported groups across the region

Highlights from group directly run Age UK Hull and East Yorkshire:

Two attendees,
Gladys & George
started 'dating'



**Lots of big birthdays
were celebrated in
this year, 4 x 90th
birthdays!**



**Kingston
swing
dancing
lessons**

**Lots of guest speakers
including Healthwatch,
Yorkshire Water, Scam
Awareness, PCSOs**



And of course, the usual
and very popular quizzes,
music and bingo!

We also worked with Mires Beck Nursery, based out in North Cave in East Riding. As a charity they provide a range of horticultural/green therapeutic activities to a wide range of individuals, and in partnership with them we developed an older persons focused group activities as therapy. The group rapidly became established and they managed to do lots of fun activities - woodland walks, painting plant pots, hessian bag painting and the usual quiz, word games and bingo.

In Walkington, East Riding, there was a well-established semi-independent social group which needed support, and we worked alongside them to become an Age UK HEY group and much has been achieved in this period:

50 sessions – with
an average weekly
attendance of 35
service users



**Attended the
Christmas
lunch in
Cottingham**



**Received
shoebox
hampers**

**Included in our guest speaker
rota, receiving talks from KCOM,
Emotional Wellbeing Hub,
Healthwatch & Age UK HEY services**



In Brough, East Riding, working with dedicated and committed volunteers, we were able to commence our first solely volunteer led social group. In the period they delivered:

**26 sessions
– with an
average of
22 clients
per session**

**Hosted a talk
by Wendy
Mitchell**



There was initial
support from
East Riding
of Yorkshire
Council

**Received
shoebox hampers**



**They attended
the Christmas
lunch in
Cottingham**

The group has also been included
in our guest speaker rota, receiving
talks from KCOM, Emotional
Wellbeing Hub, Healthwatch &
Age UK HEY services

Social group

Case Study

Mrs D is a service user who doesn't just attend one of our groups, but also helps out at our group called "Feel Good Thursdays". She enjoys the social interaction and helping out with the washing up and the tea trolley!

However it wasn't always this way. Mrs D initially joined the group when her husband was in full-time residential nursing care. Sadly, he died and Mrs D was devastated and ceased coming to the social group. However, after a number weeks Mrs D came back to the social group, and it transformed her situation.



“

With my husband in residential care, I visited him every day, and after his passing it left such a big gap in my life. But I managed to pluck up the courage to come back to the social group and I hadn't realised how much I had missed it. The support from both the staff and the other people attending the group has helped to give me a sense of purpose again.

Mrs D

”

Mrs D has gone on to continue to be a regular attendee, and like many social group attendees has found that at times attending the social group has ensured she could quickly access the support she needed. Age UK HEY have helped Mrs D when she had a fall, accessing our support services, and we have also provided her with information and advice resulting in additional benefit claims and funding for a stair lift.

There are many, many Age UK HEY social group attendees with very similar stories to that of Mrs D. The groups provide not just a great range of activities at them, but also a “reason” for older people to come out of their house and make that journey. And the journey itself is beneficial in terms of the physical exercise and also the confidence it builds in breaking down barriers of isolation and loneliness.

Walking Football

The Age UK Hull and East Yorkshire walking football programme is all about helping older people in communities to keep active and to improve physical and mental wellbeing through playing the game. The sessions are open to anyone over the age of 50 regardless of ability or previous experience.



98 sessions were held across venues throughout the year, with an average attendance of over 14 people per session.

“ Whist still being able to play the ‘beautiful game’ is good – and I suppose the exercise is too – what we all really appreciate is the friendship and social opportunities it gives us. We might only be on the pitch for an hour – but we spend just as long in café afterwards with each other just talking about anything and everything!

Walking football attendee ”

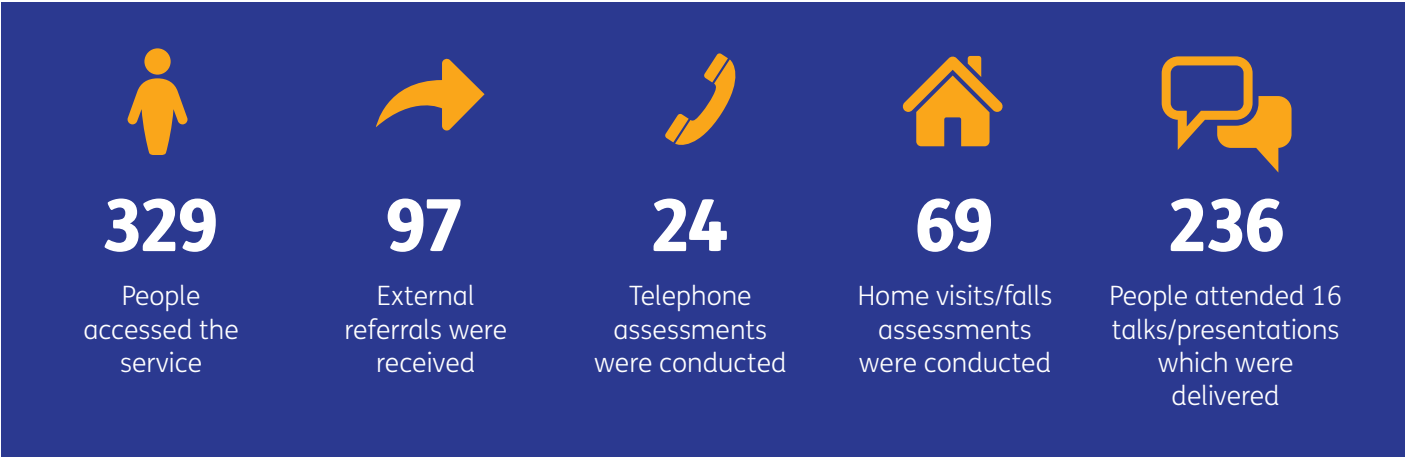


Falls

Falls are a common, but often overlooked, cause of injury. Around one in three adults over 65 who live at home will have at least one fall a year, and about half of these will have more frequent falls.

The Age UK Hull & East Yorkshire Falls prevention team visit older people in their homes and carry out holistic risk assessments to identify any potential risks in the home as well as offer advice on how to prevent any further falls occurring. Our Team also go out into the community and offer information and advice to Social groups as well as other professionals working in Health and Social Care.

In the period our falls team achieved the below:



Falls Support and Prevention Services

Case Study 1

LS called our office after a family member recommended, they contact us, as they wanted some help in their bathroom due to reduced mobility issues. We made a referral to the CHCP falls team for a full assessment. LS has many complex health problems and with her husband looking after her needs she is now having to sleep downstairs – neither of them can get out unless for medical appointments and they are both now feeling isolated. After the full CHCP assessment, aids and adaptations were put into the house, with plans for further adaptations to be installed – all enabling LS and her husband to have far greater mobility about the house.

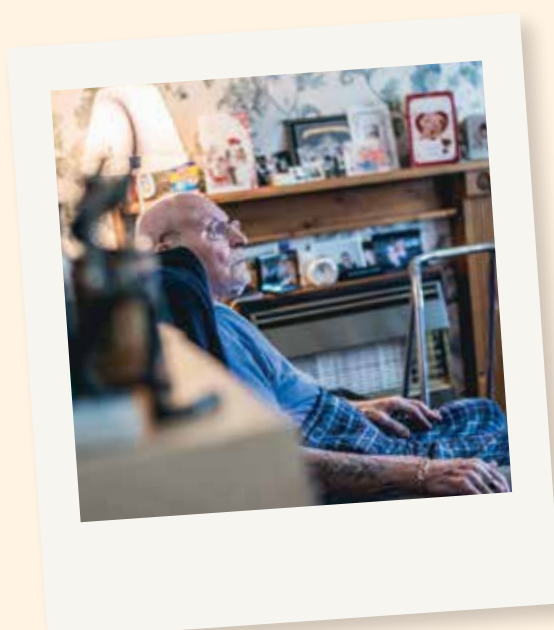
LS's husband was very happy with the help they have been provided with so far and thanked us for referring his wife to the CHCP Falls team as it has helped them a lot. And we also signposted the husband to CISS (Carers Information Support Service) for support and information on the Home Library service, as they find it hard to go out. We also discussed benefit entitlements, and they are aware we can support them both with such enquires should they wish.



Case Study 2

The Age UK HEY Information and Advice team were working with a service user who told them he had fallen several times. He has mental health problems, had attempted suicide several times and is receiving support for mental health problems. Whilst he has a history of falls, he had never had a falls assessment before, so we conducted one and a referral was made to CHCP falls team for a full assessment.

We followed up a few weeks later, as we do with all service users, and he was very happy. The falls team were coming to install some aids for him. He thanked us for all the help and contact we have made on his behalf and he is looking forward to being more independent and able to stay in his marital home, which he feels will help with his mental health as he has been anxious about his situation. We also encouraged him to consider accessing our befriending services and signposted him to HEY MIND and Lets Talk for further support.



IT and Biscuits

Delivered in partnership with KCOM, our IT & Biscuits sessions are all focused at helping older people to feel more confident online. Attendees have the opportunity to learn how to use the internet to stay in touch with friends and family, pay household bills and provide easy access to interests and information.

We also encourage older people to bring along whatever IT devices they may have and we help them to learn how to use them, learn what the devices are capable of and how to get best from them – all whilst remaining safe and secure whilst online.

From smart phones, to a slow PC/lap top to simply sending an email, our team of Age UK HEY staff and volunteers and expert staff from KCOM are getting more and more older people online, and safely. At a time when many services are going online - covering everything from banking, energy bills to accessing health services, there is such a critical need for services such as IT and Biscuits.

During 2023/2024 IT and Biscuits achieved:



12

Sessions delivered

13

Older people per session

4

KCOM staff per session

2

Age UK HEY volunteers per session



2. Home Support

At Age UK Hull & East Yorkshire, we pride ourselves on supporting and encouraging older people to live independently in their own homes. We have an established team of trusted, trained, and experienced Home Support Workers who older people can rely on to help them to continue to live independently in their own homes.

Over the 2023/24 period we have invested and developed our Home Support service and greatly increased the range of services we offer to include:



Cleaning



One-off spring clean



Laundry/ironing



Meal preparation



House sitting calls



Medication
prompting &
support



Shopping (with you
or for you)



Escorting you to
appointments - or
going for a coffee
& a chat



Walking your dog



Holiday packages
- support whilst
family/carers are
away

...and we simply tell people to just ask us, and we will see what we can do.

Cleaning people's homes is still the most commonly used service – with feedback from family members highlighting services such as shopping and escorting clients to appointments as really supporting them, taking some of the load off their shoulders when they are supporting their elderly loved ones.

This development has seen some amazing results:

- **6,976 hrs of support delivered**
- **143 individual customers**
- **17 members of staff now engaged**

We have also invested in the infrastructure and systems required to support such an expansion with the

recruitment of admin staff and implementation of a new CRM system. These developments have streamlined resource planning, payroll processes and invoicing. Enabling BACS payments and card payments over the phone has also reduced administration and sped up income collection. Future plans are to move to direct debit invoice payments – which many clients are already asking for.

The service is operated on a break-even basis, so service user charges are closely affected by changes such as inflationary pressures and changes to the national minimum wage. During this period charges were increased to maintain a break-even position and only 5 clients chose to cease the service as a result.



Home Support Case Study

A family member contacted us as their sister had become a recluse since getting long covid and was unable to go shopping for herself and was also too frightened to go out due to poor mobility and her mental health was severely impacted by this lack of mobility.

Visits were arranged once every 2 weeks, with our Home Support worker starting off by ordering the clients shopping via telephone and getting this delivered the following day. We chose to do it this way first as the client wanted to build rapport and trust with us and this successfully greatly reduced the client's anxiety. After a few months, the client was confident enough for our staff member to go and get their shopping for them and a few months later the client felt confident enough to go out shopping with us. These have turned into weekly shopping visits for the client and they are a lot more confident and far less anxious.

We did not at first think we would be able to support this client when they were first assessed as due to their mental health, anxiety and the frustration they were feeling it really difficult to break through when communicating with them.

However, all that was required was a little time and patience by our staff team, and we've been able to get this client to where they are today – both the client and her sister (who made the initial contact) are so much happier.



3. Befriending

Our Befriending service aims to reduce loneliness for older people by providing regular contact, made by a fully trained and supported Age UK Hull and East Yorkshire Volunteer Befriender. Contact is made in a variety of ways, with our focus being to engage and support the lonely older person in a way which suits them best.

Overall 372 individual service users accessed our befriending services during 2023/24.

Telephone Befriending Service

- The Telephone Befriending service aims to reduce loneliness by providing a regular telephone call, allowing the older person to enjoy general conversation on subjects that interest them.



Home Visiting Befriending Service

- This service provides support to older individuals who are housebound in the comfort of their own home. Our trained volunteers are matched to the service user and provide regular friendship visits with the aim of reducing the feelings of social isolation and loneliness.

Penpal Befriending

- Our Penpal befriending service matches older members of our community with pen friends who have common interests or simply share that feeling of excitement when a handwritten letter is posted through the door!
- We actively recruit older people to join Penpal Befriending, alongside other volunteers. Letters are sent monthly and writing sets are provided for those that need them.
- The Penpal service was very much in its infancy during 2023/24 however it has grown from strength to strength during the period, with 26 service users receiving regular letters.

Volunteers are at the core of all aspects of the Befriending service. Each Volunteer receives an induction and full training on befriending and listening skills, along with on-going regular supervision and support. Our team of volunteers delivered some amazing achievements during 2023/24:

14,846

total hours of
befriending support

6,188

hours in telephone
befriending – (42%)

8,658

hours in home visiting
befriending – (58%)

Befriending Service

Case Study 1

A son referred his Dad to us as he was worried about how lonely and isolated he was increasingly finding his Dad to be.

Mr W is 96 years old and lives with his wife, of the same age, who has dementia. Mr W struggles with his own mobility and also cares for his wife. As a result of her dementia Mrs W doesn't speak, leaving Mr W feeling very lonely and very frustrated. They have 3 children, who all live away, however one of them visits every weekend. Mr W wants to keep living in his own home with his wife and is afraid they may have to go into residential care but knows his wife wouldn't cope with the change, so they had arranged for carers to come and provide support.

We were able to match Mr W with a home visiting befriending volunteer, LH, who lived close by and also had experience of dementia as she helped care for her Grandma.

Regular visits soon started to take place.

The relationship between Mr & Mrs W and the volunteer LH quickly blossomed and Mr W thoroughly enjoys her weekly Friday visits. They cover all topics and it is clearly evident how much LH also enjoys her chats with Mr W too, hearing all his incredible stories. On Good Friday, LH brought Mr and Mrs W fish and chips at lunchtime, and they all sat at the table. Mr & Mrs W were incredibly grateful and thoroughly enjoyed it so they will be doing that again! Mrs W also has a relationship with LH and is comfortable in her presence, with LH helping her back to her chair when she is wandering.

As is the case with many volunteer befrienders, they often get almost as much out of their befriending activity as do the people they are spending time with.

Case Study 2

J is a Home Visiting Befriender who classes himself as young at heart, and he lives on his own so appreciates the difficulties this can bring. He has befriended a number of people, all with differing needs, and is happy to make a difference.

J was a volunteer at Hull Royal Infirmary as a Meet and Greeter but during Covid the position was stopped and never re started. John enjoyed meeting people and helping them around the hospital, so wanted to chat to different people who are lonely and isolated. Being a volunteer makes him feel fulfilled and the rewards of making a difference to someone else. He likes to have a purpose in life and a reason to get up in a morning keeping busy.

By becoming a befriender meant that J now had a purpose again since Covid. We have many people in need of company and J is very flexible and is happy to visit several people on his daily walks which means he has a purpose for a walk keeping him fit and healthy whilst doing good. J now has a number of

people he visits and even if they get admitted into hospital he visits them in there to keep the continuity and they see a familiar face. This also helps the family at visiting times. John is also visiting a lady who is in hospital long term and needed company as the family were at work and were unable to make daytime visits.

"I'm happy to visit anyone at home or in hospital, there are many older people who need my help"

John feels like he is making a big difference, and he enjoys chatting and making friends. And by being a volunteer he is also getting the benefits of what having a befriender gets.

He has made a real friend with one gentleman who lives near his home who are similar ages and have lots in common. **"He is a great chap and we have loads in common, he is very funny and we have a laugh".**

4. Information and Advice

Our Information and Advice service provides help and support for older people on a variety of issues, offering a free and confidential information and advice service for older people, their families, carers and partner agencies.

Our dedicated and trained team of professional advisors help assess and identify what benefits older people in need may be entitled to and then provide guidance and support in completing application for benefits claims. Attendance Allowance, Carers Allowance, Pension Credit, Housing Benefit and Cost of Living Grants form the core of the benefit claims support we offer.

The advice and support doesn't stop there – with our team also providing support upon a variety of areas of support including local services, crime prevention, utility/energy costs and efficiency measures, housing, health, care and social issues.



2023/24 has proven to be one of the most challenging years yet for our welfare advice service. Demand for support has risen significantly from across Hull city and especially from across the wider East Riding region.

Not only has the number of older people requiring support increased, but so has the complexity of their needs. This adds considerable strain to an already stretched and limited resource. We are increasingly finding that each service user enquiry is taking longer to deal with due to multiple areas of advice and support, which then necessitates more intensive follow ups and on-going support.

For the first time in a number of years we have had to close the service to new enquires several times during the 2023/24 period simply because of the scale and level of demand.

The extra pressure of supporting these clients has placed significant logistical and emotional demands upon our team of staff and volunteers. However, despite this the team have performed magnificently, and securing the resources to grow the team and develop further capacity is a priority for us during the next 12 months.

And even though we have faced such an unprecedented level of demand, we have yet again achieved some amazing results:



3136

Incoming enquiries were handled



1798

Clients were supported



360

Benefit assessment checks completed



234

Benefit application forms were supported

We can't emphasise enough the success and impact that this figure delivers. Our team of 2 advisors, supported by a small team of dedicated volunteers, are responsible for bringing in over £1.6 million of extra income into the region – this is then spent locally by those older people to live happy and independent later lives.

Our success not only represents a significant financial investment into Hull and East Yorkshire, but also delivers significant financial savings to the public purse. The service users accessing our support use the extra income to keep healthy - they can now get to health appointments and buy in the additional aids/support they need to continue living at home – this drastically reduces the demand these older people place upon local health services.

Building upon these successes we are aiming to raise the profile of this message of “prevention” and its wider impacts across the region, to firmly establish clear cases of support for further investment in this core area of our work.

Wills and Lasting Power of Attorney (LPA)

Working in partnership with local solicitors Brewer Wallace regular sessions are held at our offices where older people are able to access 30 minutes of free (no obligation) legal advice regarding wills and LPA.

This support has seen many older people then go on to seek formal legal advice regarding their wills or LPA and as a result tell us that they feel far more settled and comforted knowing that such sensitive matters have been dealt with.

£1,642,182
– value of benefits
secured for Hull
and East Yorkshire
residents

CAB Project

Working jointly with Hull and East Riding Citizens Advice Bureau we have recruited and trained volunteers, sharing them between organisations and building up their experiences and skills. With the CAB being more of generalist provider then volunteers get a good grounding in generalist advice work, where as their time at Age UK Hull and East Yorkshire develops specific skills and knowledge regarding older people.

Over time this has seen volunteer numbers grow across both organisations, with skills and knowledge developing further. After initial training then the volunteers then focus their interests and specialisms and a number have elected to focus time and energy with us at Age UK HEY, adding significant value and capacity to our Information and Advice teams work.



Information and advice

Case Study

A couple contacted Age UK HEY making enquiries about attendance allowance – a benefit to assist people with mobility and care needs. He was 80 and she 74 yrs old, they did not claim any disability benefits. Mrs F had tried applying for attendance allowance (AA) before, but as is often the case with many older people she did not know how to fill in the AA form so did not bother with it because it was so complicated.

Mr F cared for his wife, personally caring for her throughout the day and night. He used to help her dress, wash, do meals, medication etc, all whilst also managing to look after himself. They have no family in the area and Mrs F cannot go out on her own. She is in a lot of pain so takes a lot of medication to help with this. Mr F has to take her to all of her medical appointments and collects her medication as well.

Mrs F used to attend one of social groups but is now unable to attend because of her mobility problems, and rarely goes out. However she did remember that when attending the group she had heard about the help our Information and Advice service can, so she thought she would give us a try to see if we could help her and her husband.

Mrs F was awarded the higher rate of attendance allowance, giving them an extra income of £101.75 a week and was also given back pay of £1017. This additional income enables them to pay for taxi's to get to medical appointments and to go shopping. It has also given them the extra money to pay for a cleaner, a gardener and a chiropodist to visit their home.

With our advice and support Mr F contacted social services regarding getting aids and adaptations for the home and now has a walking stick, walking frame and successfully applied for a blue parking badge.



“

Thank you very much for your support. I would have never been able to do the attendance allowance form if you had not helped me. I could not do it before and we are very grateful for the way you helped us. Getting the attendance allowance makes a big difference to our weekly income.

Mr F

”

Mr & Mrs F now know to come back to us in the future if they ever need help and we have improved their quality of life. They've both told us they will pass on the details of Age UK HEY to other people, and we know from experience that this really does encourage others to come to us for help.

Sadly, this is far from a one-off set of circumstances. We regularly come across clients who don't know what support they may be entitled to and how to apply for benefit support as it can often be very complicated.

Volunteers

Volunteers underpin every element of our work.

Everyday volunteers are in our offices helping with everything from answering the phones, administration, filing and delivering vital information and advice support to older people.

Our social groups operate every day of each week, and many are supported by volunteers working alongside paid staff. This year two entirely volunteer led social groups have developed, and this has enabled us to reach and support older people in areas of East Yorkshire which wouldn't have been possible without volunteers.

We have also partnered with a number of local businesses delivering a range of employee volunteering opportunities – an area we are developing further in 2024/25.



And everything else...

Whilst all the core areas of activity are busy delivering the services and support local older people need – we have also been doing many of things too:

Christmas lunches

Meals were held in Hull and East Yorkshire providing isolated older people the opportunity to come together for a meal and share in fellowship and entertainment along with festive food. Over 170 older people attended and we were very thankful for the support of KCOM staff volunteers and our own volunteers and trustees for their support at these events - and we have plans to significantly expand the numbers in 2024.

“Thank you for the lovely time we had at Christmas. What a surprise, free raffles and the hampers. You must be really proud of your staff for the wonderful work they do and the volunteers”.

Nora





Christmas shoebox appeal

935 shoe boxes all containing a range of special gifts and useful everyday items were distributed to vulnerable older people across the region. We had 9 collection points and an army of both our own volunteers and from local business, especially Smith and Nephew and KCOM, checked and packed and helped distribute a record number of shoe boxes. In 2024 we are aiming to exceed the 1000 shoebox milestone!

“Thank you so much for the beautiful box my mum received from you. She was overwhelmed. Thank you so much”.

“One lady was so overcome by the kindness she was in tears”

Volunteer distributor

York Ebor Races

We were shortlisted to win £10,000 as part of the Sky Bet Community Fund awarded at the York Ebor Race Festival. We didn't win the main prize but came home with a £1,000 cheque - CEO had a wonderful day out with one of our longest serving volunteers on ladies day, and two senior managers enjoyed the main Ebor race day - all courtesy of the Sky Bet Community Fund.

East Riding VCSE Collaborative

The CEO has played an active role in the innovative and developmental collaborative, initiated by HEY Smile. The collaborative is working strategically to lobby, influence and bring about change across East Riding and strengthen the role and raise the profile of the VCSE sector as a whole. The Age UK HEY CEO sits on the collaborative board representing 'Adults and Older People'.

Staff Training

We value, support and invest in our team – creating opportunities for staff to share knowledge and experience with each other and also investing in external training opportunities for all. This year our CEO became a Clore Fellow via their Experienced Leader Programme and also is undertaking training to be a coach.

Also a number of other staff have been supported to step up into leadership opportunities within the charity and to underpin this we have enabled them to engage in new to leadership and emerging leadership training opportunities.

Relocation

Towards the end of the year we were finally able to identify a new office base to relocate to. It will mean moving out of the city centre, however it provides much needed space for our expanding services and a far more welcoming and usable space to provide face to face services to older people. It will also provide an excellent foundation upon which to take the charity forward on the next stage of our development.



Trustees' Report

The Trustees present their annual report together with the audited financial statements of the Charity for the year 1 April 2023 to 31 March 2024.

The Trustees confirm that the annual report and financial statements of the Charity comply with the current statutory requirements, the requirements of the Charity's governing document and the provisions of the Statement of Recommended Practice (SORP), 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) as amended by Update Bulletin 1 (effective 1 January 2015).

Age UK Hull is a charity and registered company which is governed by a board of Trustees.

Objectives and Activities

Taking account of the needs of older people within the charity's area of benefit are central to the trustees' approach to setting objectives and planning for activities. The Trustees have given due consideration to general guidance published by the Charity Commission relating to public benefit, including the guidance 'Public benefit: running a charity (PB2)'.

Our vision is: "For all older people to live gratifying sustainable independent later lives".

Our mission in pursuing that vision is to: "Ensure that older people get the services and support they need where and when they need them."

As Age UK Hull we are the only organisation in the region with a focus on older people and their needs. We are uniquely best placed to ensure that the older people of the region get the services they need where and when they need them.

The Trustees' report details how these objectives were achieved in 2023/24 through the provision of our charitable services, which we are continuing to deliver during 2024/25.

Financial Review

Principal funding sources

Most of our services are delivered under contract or through grant aid. We continue to be extremely grateful to everyone who funds us to support older people in Hull and East Yorkshire.

Reserves policy

Age UK Hull Board of trustees has reviewed the amount of reserves it regards as a minimum prudent requirement and has concluded that provision for six months administration, public education and fundraising costs is sufficient. This would allow time to manage cost reductions or fund appeals as required whilst minimising the impact on service provision.

Based on the forecast for 2024/25, the desired minimum reserve level is approximately £300,000. As at 31 March 2024, free reserves less amounts held as fixed assets stands at £640,315. Additional funds are to be utilised for additional service enhancement, building capacity and expanding the public information programme going forward.

Structure, Governance and Management

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

The Company's governing document is its Memorandum and Articles.

Organisational structure

The body responsible for the general control and management of the Charity is the Board of Trustees.

A nominated Trustee advises and liaises with senior managers on matters of finance, personnel, health & safety, volunteering and fundraising.

The Trustees delegate the day-to-day management of the charity to an executive team which executes the policies and strategies defined by the board.

Membership of the Board

The Board comprises 5 Trustee members (a quorum of 3) and meets a minimum of 4 times a year. The Board are actively recruiting trustees.

Method of appointment or election of trustees:

New Trustees are recruited and appointed using various methods. These methods include advertising, networking and by making a direct approach to people that might be interested and have necessary skills and experience. Age UK Hull's Policies and Procedures in respect of Trustee recruitment and development are thorough and include key elements relating to services and activities, legislation, equal opportunities and diversity.

Risk management

The Trustees have overall responsibility for ensuring that the Charity has appropriate systems of internal controls across the entire organisation of Age UK Hull. 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 systems of internal control are designed to provide reasonable assurance against material misstatement or loss. Internal control processes implemented by the Trustees include:

- Assurance to donors and beneficiaries that there are appropriate systems in place to ensure that the resources of the Charity are effectively allocated and utilised.
- A strategic plan and an annual budget approved by the Trustees.
- Regular consideration by the Trustees of financial results, variances from budgets, forecasts, and performance indicators.
- Delegation of authority and segregation of duties.
- Identification and management of risk.
- Although there no requirement for an audit under the companies act the trustees do

The Trustees have in place a formal risk management process to assess and document risks and implement risk management strategies. This process includes review by Trustees, Chief Executive Officer and the Executive Team. The process identifies the types of risks the Charity faces, prioritises them in terms of likelihood of occurrence and potential impact and identifies the means of mitigating these risks. Risk management is embedded in the day-to-day processes of the Charity.

The Risk Management Plans also aim to safeguard the staff and volunteers, customers and the Charity's reputation. Age UK Hull ensures that staff are trained and properly supported, that there is a Safeguarding Policy in place for older people using the services and that adequate personal, public and professional liability insurance is in operation.

Reference and administrative details

Registered Company number – 04792749 (England and Wales)

Registered Charity number – 1101418

Registered office:

Axida House,
350 Preston Road
Hull HU9 5HH

Trustees

- Peter David Duffield LLB FCA
- Jayne Mansfield
- Rebecca Howes
- Daniel James Gladstone – resigned 09/10/23
- Jillian Louise Gledhill – resigned 17/12/23
- Fred Owen – appointed 08/04/24
- Julie Mills – appointed 21/10/24

Auditors

Smailes Goldie
Regents Court
Princess St
Hull
HU2 8BA

Solicitors

Rollits
Citadel House
High Street
Hull
HU1 1QE

Bankers

Bank of Scotland
33 Old Broad Street
PO Box 100
BX2 1LB

Statement of Trustees' Responsibilities

The trustees (who are also the directors of Age UK Hull for the purposes of company law) are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting 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 those financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity 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;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and to 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.

In so far as the trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware; and
- the trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

Report of the trustees, incorporating a strategic report, approved by order of the board of trustees, as the company directors, on 21st October 2024 and signed on the board's behalf by:

Peter David Duffield LLB FCA

Chair of Trustees

Statement of Financial Activities

for the year ended 31st March 2024

		2024	2023
		Unrestricted funds	Total funds
	Note	£	£
INCOME AND ENDOWMENTS FROM			
Donations and legacies	2	38,119	53,150
Charitable activities	3		
Charitable activities		487,515	375,963
Total		525,634	429,113
EXPENDITURE ON			
Charitable activities	4		
Charitable activities		592,383	500,890
NET INCOME / (EXPENDITURE)		(66,749)	(71,777)
RECONCILIATION OF FUNDS			
Total funds brought forward		734,920	806,697
TOTAL FUNDS CARRIED FORWARD		668,171	734,920

Balance Sheet

For the year ended 31 March 2024

		2024	2023
		Unrestricted funds	Total funds
	Note	£	£
FIXED ASSETS			
Tangible assets	10	27,769	28,838
Investments	11	87	87
		27,856	28,925
CURRENT ASSETS			
Debtors	12	31,784	28,846
Cash at bank		704,738	801,766
		736,522	830,612
CREDITORS			
Amounts falling due within one year	13	(49,246)	(66,211)
NET CURRENT ASSETS		687,276	764,401
TOTAL ASSETS LESS CURRENT LIABILITIES		715,132	793,326
CREDITORS			
Amounts falling due after more than one year	14	(46,961)	(58,406)
NET ASSETS		668,171	734,920
FUNDS	16		
Unrestricted funds		668,171	734,920
TOTAL FUNDS		668,171	734,920

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31st March 2024. The members have not deposited notice, pursuant to Section 476 of the Companies Act 2006 requiring an audit of these financial statements.

The trustees acknowledge their responsibilities for:

- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

These financial statements have been audited under the requirements of Section 145 of the Charities Act 2011.

The financial statements were approved by the Board of Trustees and authorised for issue on 18th December 2024 and were signed on its behalf by:

Peter David Duffield LLB FCA

Chair of Trustees

Cash Flow Statement

For the year ended 31 March 2024

		2024	2023
	Note	£	£
CASH FLOWS FROM OPERATING ACTIVITIES			
Cash generated from operations	1	(80,079)	104,826
Interest paid		(1,460)	(1,254)
		<u>(81,539)</u>	<u>103,572</u>
Net cash (used in)/provided by operating activities		(81,539)	103,572
CASH FLOWS FROM INVESTING ACTIVITIES			
Purchase of tangible fixed assets		(4,043)	(10,135)
		<u>(4,043)</u>	<u>(10,135)</u>
Net cash used in investing activities		(4,043)	(10,135)
CASH FLOWS FROM FINANCING ACTIVITIES			
Loan repayments in year		(12,000)	(12,000)
Interest Paid		554	651
		<u>(11,446)</u>	<u>(11,349)</u>
Net cash used in financing activities		(11,446)	(11,349)
CHANGE IN CASH AND CASH EQUIVALENTS IN THE REPORTING PERIOD		(97,028)	82,088
CASH AND CASH EQUIVALENTS AT THE BEGINNING OF THE REPORTING PERIOD		801,766	719,678
CASH AND CASH EQUIVALENTS AT THE END OF THE REPORTING PERIOD		704,738	801,766

Notes to the Cash Flow Statement

For the year ended 31 March 2024

1. Reconciliation of net expenditure to net cash flow from operating activities

	2024	2023
	£	£
NET (EXPENDITURE)/INCOME FOR THE REPORTING PERIOD (AS PER THE STATEMENT OF FINANCIAL ACTIVITIES)	(66,749)	(71,777)
Adjustments for:		
Depreciation charges	5,113	4,663
Interest paid	1,460	1,254
Gains/Losses on Investments	-	28
(Increase)/decrease in debtors	(2,938)	142,427
(Decrease)/increase in creditors	(16,965)	28,231
Net cash (used in)/provided by operations	(80,079)	104,826

2. Analysis of changes in net funds

	At 1.4.23	Cash flow	At 31.3.24
	£	£	£
NET CASH			
Cash at bank	801,766	(97,028)	704,738
	<u>801,766</u>	<u>(97,028)</u>	<u>704,738</u>
DEBT			
Debts falling due within 1 year	(12,000)	-	(12,000)
Debts falling due after 1 year	(58,406)	11,445	(46,961)
	<u>(70,406)</u>	<u>11,445</u>	<u>(58,961)</u>
Total	<u>731,360</u>	<u>(85,583)</u>	<u>645,777</u>

Notes to the Financial Statements

For the year ended 31 March 2024

1. Accounting policies

Basis of preparing the financial statements

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention, with the exception of investments which are included at market value.

Critical accounting judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. This includes the choice of depreciation method applied to fixed assets and provisions for legacies. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

Income

Income received for services provided is accounted for on an accruals basis.

Cash donations, gifts and legacies are included in full in the income and expenditure account as they are received. Any significant non-cash donations are included in the income and expenditure account at the trustees' estimate of their market value when received. The value of voluntary help is not included in the accounts.

Grants and other funding of revenue nature are deferred and released to the income and expenditure account over the period to which they relate.

Bank interest is included in the income and expenditure account on an accruals basis.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category.

Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets

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

General Equipment - 10% on cost
Fixtures and fittings - 10% on cost

Taxation

The charity is exempt from corporation tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

Financial instruments

Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments. An equity instrument is any contract that evidences a residual interest in the assets of the company after deducting all of its liabilities.

Trade and other debtors are recognised initially at transaction price less attributable transaction costs. Trade and other creditors are recognised at an initial transaction price plus attributable transaction costs. Subsequent to initial recognition they are measured at amortised cost using the effective interest method, less an impairment loss in the case of trade debtors.

Investments

Investments both current and fixed are included at fair value within the accounts.

2. Donations and legacies

	2024	2023
	£	£
Donations	20,070	11,185
Legacies	18,049	41,965
	38,119	53,150

3. Income from charitable activities

		2024	2023
		£	£
Grants	Charitable Activities	331,272	278,400
Fees charged to clients	Charitable Activities	156,243	97,563
		487,515	375,963

Grants in the year included above are as follows:

	£
District/City Council	115,635
Age UK National	39,115
Two Ridings Community Foundation	67,430
National Lottery	74,773
KCOM Partnership	8,333
Charitable Trusts	25,986
	331,272

4. Charitable activities costs

	Direct costs	Support costs (see note 5)	Totals
	£	£	£
Charitable activities	487,229	105,154	592,383

5. Support costs

	Management	Finance	Governance costs	Totals
	£	£	£	£
Charitable activities	52,291	1,459	51,404	105,154

6. Net income/(expenditure)

Net income/(expenditure) is stated after charging/(crediting):

	2024	2023
	£	£
Auditors' remuneration	8,880	6,000
Depreciation – owned assets	5,112	4,664

7. Trustees' remuneration and benefits

There were no trustees' remuneration or other benefits for the year ended 31st March 2024 nor for the year ended 31st March 2023.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31st March 2024 nor for the year ended 31st March 2023.

8. Staff costs

	2024	2023
	£	£
Wages and salaries	396,989	337,862
Social security costs	21,729	7,534
Other pension costs	6,475	4,507
	425,193	349,903

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

	2024	2023
Administrative and support	6	6
Charitable Activities	23	17
	29	23

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

9. Comparatives for the statement of financial activities

	Unrestricted funds £
INCOME AND ENDOWMENTS FROM	
Donations and legacies	53,150
Charitable activities	
Charitable activities	375,963
Total	429,113
EXPENDITURE ON	
Charitable activities	
Charitable activities	500,890
NET INCOME/(EXPENDITURE)	(71,777)
RECONCILIATION OF FUNDS	
Total funds brought forward	806,697
TOTAL FUNDS CARRIED FORWARD	734,920

10. Tangible fixed assets

	Fixtures and fittings £	General equipment £	Totals £
COST			
At 1st April 2023	40,531	36,497	77,028
Additions	1,200	2,843	4,043
At 31st March 2024	41,731	39,340	81,071
DEPRECIATION			
At 1st April 2023	31,410	16,780	48,190
Charge for year	1,103	4,009	5,112
At 31st March 2024	32,513	20,789	53,302
NET BOOK VALUE			
At 31st March 2024	9,218	18,551	27,769
At 31st March 2023	9,121	19,717	28,838

11. Fixed asset investments

	Listed investments £
MARKET VALUE	
At 1st April 2023 and 31st March 2024	87
NET BOOK VALUE	
At 31st March 2024	87
At 31st March 2023	87

There were no investment assets outside the UK.

12. Debtors: amounts falling due within one year

	2024 £	2023 £
Trade debtors	19,368	19,764
Prepayments and accrued income	12,416	9,082
	31,784	28,846

13. Creditors: amounts falling due within one year

	2024	2023
	£	£
Other loans (see note 15)	12,000	12,000
Trade creditors	10,784	7,138
Social security and other taxes	8,244	6,809
Accruals and deferred income	18,218	40,264
	49,246	66,211

14. Creditors: amounts falling due after more than one year

	2024	2023
	£	£
Other loans (see note 15)	46,961	58,406

Other loans is the amount of the loan from Hull City Council that is not repayable until after more than one year from the balance sheet date. The loan is repayable at £12,000 per annum and will be repaid by 31 March 2029.

15. Loans

An analysis of the maturity of loans is given below:

	2024	2023
	£	£
Amounts falling due within one year on demand:		
Other loans	12,000	12,000
Amounts falling between one and two years:		
Other loans – 1-2 years	24,000	24,000
Amounts falling due between two and five years:		
Other loans – 2-5 years	22,961	34,406

16. Movement in funds

	At 1.4.23	Net movement in funds	At 31.3.24
	£	£	£
UNRESTRICTED FUNDS			
General fund	734,920	(66,749)	668,171
TOTAL FUNDS	<u>734,920</u>	<u>(66,749)</u>	<u>668,171</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
UNRESTRICTED FUNDS			
General fund	525,634	(592,383)	(66,749)
TOTAL FUNDS	<u>525,634</u>	<u>(592,383)</u>	<u>(66,749)</u>

Comparatives for movement in funds:

	At 1.4.22	Net movement in funds	At 31.3.23
	£	£	£
UNRESTRICTED FUNDS			
General fund	806,697	(71,777)	734,920
TOTAL FUNDS	<u>806,697</u>	<u>(71,777)</u>	<u>734,920</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
UNRESTRICTED FUNDS			
General fund	429,113	(500,890)	(71,777)
TOTAL FUNDS	<u>429,113</u>	<u>(500,890)</u>	<u>(71,777)</u>

A current year 12 months and prior year 12 months combined position is as follows:

	At 1.4.22	Net movement in funds	At 31.3.24
	£	£	£
UNRESTRICTED FUNDS			
General fund	806,697	(138,526)	668,171
TOTAL FUNDS	<u>806,697</u>	<u>(138,526)</u>	<u>668,171</u>

A current year 12 months and prior year 12 months combined net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
UNRESTRICTED FUNDS			
General fund	954,747	(1,093,273)	(138,526)
TOTAL FUNDS	<u>954,747</u>	<u>(1,093,273)</u>	<u>(138,526)</u>

17. Related party disclosures

During the year to 31 March 2024, Age UK Hull was supplied with IT hardware, software and support services from Jupiter IT Solutions Limited, of which Mr D J Gladstone is a director of. The total of services charged until Mr D J Gladstone resigned as trustee on 9 October 2023 was £9,852. These transactions were all at arms length.

18. Limited by guarantee

The company is limited by guarantee.

Detailed Statement of Financial Activities

For the year ended 31 March 2024

	2024 £	2023 £
INCOME AND ENDOWMENTS		
Donations and legacies		
Donations	20,070	11,185
Legacies	<u>18,049</u>	<u>41,965</u>
	38,119	53,150
Charitable activities		
Grants	331,272	278,400
Fees charged to clients	<u>156,243</u>	<u>97,563</u>
	487,515	375,963
Total incoming resources	525,634	429,113

EXPENDITURE**Charitable activities**

Wages	396,989	331,649
Social security	21,729	-
Pensions	6,475	1,435
Telephone	7,003	7,781
Postage and stationery	7,231	4,288
Premises	3,137	186
Office Costs - IT	9,884	1,579
Professional Fees	11,657	3,408
Staff Costs	5,522	4,474
Other Expenses	16,498	23,777
Fixtures and fittings	1,104	1,014
	487,229	379,591

2024 **2023**

£ **£**

SUPPORT COSTS

Wages	-	6,213
Social security	-	7,534
Pensions	-	3,072
Postage and stationery	1,470	473
Sundries	2,677	1,178
Office Costs - IT	1,435	87
Premises	30,976	26,730
Staff Costs	2,882	547
Professional Fees	8,842	9,326
Computer equipment	4,009	3,650
	52,291	58,810

FINANCE

Bank charges	1,459	1,254
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Governance costs

Auditors' remuneration	8,880	6,000
Accountancy and legal fees	42,524	55,235
	51,404	61,235
Total resources expended	592,383	500,890
Net expenditure	(66,749)	(71,777)

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www.ageuk.org.uk/hull

Age UK Hull Annual report 2023/24

Supporting local people in later life



Contents

Introduction by the Chair	4
Values and Behaviours	5
Age UK Pathway for a Gratifying Sustainable and Enjoyable Later Life	6
Age UK Hull and East Yorkshire Services	7
1. Positive Activities	7
2. Home Support	19
3. Befriending	21
4. Information and Advice	23
Trustees' Report	28
Objectives and Activities	28
Financial Review	29
Structure, Governance and Management	29
Statement of Trustees' Responsibilities	31
Statement of Financial Activities	32
Balance Sheet	33
Cash Flow Statement	34
Notes to the Cash Flow Statement	35
Notes to the Financial Statements	36
Detailed Statement of Financial Activities	42

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Our vision

Older people can live happy independent later lives.

”

“

Our mission

Ensuring local older people get the services and support they need.

”

Introduction by the Chair

2023/24 has continued to see Age UK Hull and East Yorkshire strengthen the breadth and depth of its services for older people across the region.

The main highlights of the period are the Community Companions project, the growth of the Home Support service and our relocation plans.

Community Companions is a significant project for the charity to secure, and doing so clearly demonstrated to a major central government department (the Department for Culture Media and Sport - DCMS) that the charity is capable of delivering such a major programme. We know that barriers to transport are the single largest factor in tackling isolation and loneliness amongst older people and the project has enabled us to make significant progress in supporting older people to overcome these. It has also enabled us to learn more about supporting older members of the LGBTQ+I and BAME communities, and whilst this work is very much in its infancy it has already been recognised by Age UK (our national partner) as a model they want us to share across the nationwide Age UK network.

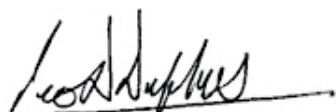
The Home Support service has grown significantly this year, exceeding all expectations. The broadening of the services offered and an unwavering commitment to service quality, along with the inherent trust customers have in the Age UK brand are the main factors behind the growth. And we have been able to successfully handle this level of growth because of our earlier decision to significantly invest in an appropriate CRM system.

The year has also seen us reach a decision to relocate the charity from what was only ever meant to be a post Covid temporary administrative hub in central Hull, to a fit for purpose building on Preston Road in East Hull. We see this move as a real seminal moment for the charity and as Chair I have every confidence that the team, our volunteers, partners and my fellow trustees will ensure the relocation is a success.

Whilst we have highlighted these aspects of our 2023/24 work, we are immensely proud of the rest of the work the whole charity continues to deliver in making life changing impacts for older people, and their carers/families. This report highlights all this work, not just reporting figures but also telling the stories of the difference this has made to people's lives.

This is a report upon the 2023/24 year that has passed, yet we are very much looking forward to the year ahead. 2024/25 sees us enter our 75th Jubilee year, complete the relocation, and deliver plans to achieve a number of externally assessed quality standards, all of which will play a significant role in securing partner and funder investment in our work.

The charity is in a good place, it is in good hands, we're very proud of what we achieved this year and we are looking forward to the year ahead.



Peter David Duffield LLB FCA
Chair of Trustees

Values and Behaviours

Values

At Age UK Hull and East Yorkshire (HEY), we do whatever it takes so that older people can live happy and independent later lives and get the services and support they need.

Our Age UK HEY values help us to do just that. They underpin everything we say and do, how we work with people, behave towards them and communicate.



Age UK Pathway for a Gratifying Sustainable and Enjoyable Later Life

The Age UK Pathway for a gratifying sustainable and enjoyable later life forms the focus of our service development, design and delivery around four key elements:



Age UK Hull and East Yorkshire Services

All of our activities are organised into 4 main themes:

1.

**Positive
Activities**

2.

**Home
Support**

3.

Befriending

4.

**Information
and Advice**



1. Positive Activities

This activity theme is all about our services that support older people to engage in activities that promote mental and physical well-being.

Older people can face many barriers to being engaged in their communities – for example the impact of age-related illnesses and medical issues can restrict mobility, and the loss of a life partner can have a devastating impact upon many aspects of life. And along with the continued Covid-19 legacy effects we continue to deal with many older people who are still very reluctant to leave the house, gather in larger groups and especially to travel independently.

However, delivering services and activities that are attractive and beneficial for older people to attend, and which are based in the heart of the communities in which they live are crucial factors in creating a reason for older people to “come out” of their homes. And we don’t just leave it there, we also support older people to overcome both the physical and emotional barriers they may have to leaving their homes.

Community Companions – Know Your Neighbourhood

This programme was the largest and most significant project Age UK Hull and East Yorkshire had secured in recent years.

It has 3 core aspects:

1

Community Companions (travel)

2

BAME

3

LGBTQ+i

Community Companions (travel) helps lonely and socially isolated older people reconnect with their communities by helping them feel more confident getting out and about and using transport – whether it is walking, bus, taxi or community transport.

The service matches lonely and isolated older people with a trained Community Companion volunteer. The aim of the service is to reduce loneliness and isolation amongst older people by helping them to reconnect with their local communities, their friends, and family. We support them to leave their homes using either public transport, community transport, taxis, walking or even cycling. We help older people address the barriers they face in leaving their homes, such as anxiety or a lack of confidence.

Our volunteer “Community Companions” accompany older people on journeys and provide empowering, gradual support to enable them to be able to take the journey alone. Support usually last 6-8 weeks and increases confidence levels, encourages independence and reduces the anxiety that many older people experience after prolonged periods of isolation.

In the 2023/24 period the Community Companions (travel) service launched in November 2023, yet managed to deliver:



28

Referrals



27

Clients joined the programme



36

Home visits were conducted



Community Companions (travel)

Case Study

BP was referred to us by the Health & wellbeing Coach at her local GP surgery as she wanted to develop the confidence to go out alone to a Social Group in the city.

BP had never married or had children, and her only companion was her little dog Chloe, who kept her company for many years and helped her through hip replacement surgery. Unfortunately, in November 2023 Chloe passed away, leaving BP still recovering at home alone with what she describes as 'no purpose'.

BP was initially referred to our Befriending service as she was lonely, however it became clear she lacked confidence getting out and about, so our Community Companions team stepped in. We visited her and assessed her needs and discussed and set some goals – the ultimate goal being to get to a Social Group.

We spent time discussing local bus routes, community transport and the use of taxis. With some support, mentoring and accompanied trips/travel opportunities BP now attends our weekly Streetlife group.



“ I am no longer lonely or isolated, I have made new friends and feel like I now have 'purpose' I'm eternally grateful to Age UK HEY.

BP

”



Community Companions (travel)

Case Study

Mr & Mrs G were referred individually by their daughter, who lives away and had heard about Age UK HEY services and our Community Companions programme on our website. She had become increasingly worried about her parents who had remained housebound since the Covid-19 pandemic.

We immediately arranged a home visit to Mr & Mrs G where we learned that Mrs G had become lonely at home, with her mental and physical health declining significantly over the last few years. Mr G was the only driver, so if she needed to go out she would need to ask him to take her, but she really wanted to be independent and to take herself to places.

“ Mr & Mrs G’s daughter couldn’t have been happier... ”

Mum and Dad are so much better now. I believe that your interaction helped with this, they just needed someone from the outside to give them a kick! We cannot thank you enough.

And Mr G had also become isolated and as was upset and worried about Mrs G and her issues, and for himself he wanted to find social groups in the area to go to.

Support was delivered over a number of weeks and the change was amazing! With our support and encouragement we helped them achieve smaller goals at first which over time helped them both reach their ultimate goal.

Mrs G now has a mobility scooter and regularly attends a knit and natter group twice a week and has the confidence to use her scooter to shop on her own.

Mr G now attends regular Men in Shed sessions twice a week and has made a new friend whom he meets weekly on an evening to attend a quiz night.

This is an example of Community Companions intervention that did not need any volunteer input and shows that some people just need the confidence of somebody else letting them know ‘they can do it’.

Community Companions (BAME and LGBTQ+i) is focused upon bringing our expertise and knowledge about supporting older people and working alongside organisations that are embedded within the two communities of focus so we can help build their capacity and also reach older people in their communities.

Community Companions (BAME) worked closely with Hull Afro-Caribbean Association (HACA) and Women Accede (WA) – both organisations are well rooted and respected in their BAME communities. Working together we ran a series of regular drop-in sessions, advice surgeries and activities all of which successfully engaged with older BAME people and developed capacity to provide support and advice.

In the period:



5

Drop in Sessions



67

Attendees



10

Attendees at
Hull Christmas
meal



10

Attendees at
East Riding
Christmas meal



Community Companions (LGBTQ+i) enabled us to build connections and develop relationships with organisations which the community trusted. Whilst this took time great foundations were built and “The Next Chapter Book Group for the over 50’s LGBTQ+ community” was started. Advertised as being for older people who are passionate about literature that celebrates and explores the LGBTQ+ community, it provides a safe and welcoming space to discuss thought-provoking books whilst connecting with like-minded individuals.

2 book club sessions have been held so far (with dates set for another 12 months) – the first attracted 4 attendees with the second attracting 6 - clearly showing potential to grow in the future.

Social Groups

Our social groups are spread across the Hull and East Yorkshire region, held in venues which are accessible and in the heart of the communities which older people live. They provide the opportunity to meet, socialise and also access support and advice.

Working with volunteers and supporting other self-managed groups, 8 groups meet each week across the region, with future plans to grow even more.

In the period:

- 347 sessions were held
- 6,644 attendances were recorded
- 15 volunteers supported groups across the region

Highlights from group directly run Age UK Hull and East Yorkshire:

Two attendees,
Gladys & George
started 'dating'



**Lots of big birthdays
were celebrated in
this year, 4 x 90th
birthdays!**



**Kingston
swing
dancing
lessons**

**Lots of guest speakers
including Healthwatch,
Yorkshire Water, Scam
Awareness, PCSOs**



And of course, the usual
and very popular quizzes,
music and bingo!

We also worked with Mires Beck Nursery, based out in North Cave in East Riding. As a charity they provide a range of horticultural/green therapeutic activities to a wide range of individuals, and in partnership with them we developed an older persons focused group activities as therapy. The group rapidly became established and they managed to do lots of fun activities - woodland walks, painting plant pots, hessian bag painting and the usual quiz, word games and bingo.

In Walkington, East Riding, there was a well-established semi-independent social group which needed support, and we worked alongside them to become an Age UK HEY group and much has been achieved in this period:

50 sessions – with an average weekly attendance of 35 service users



Attended the Christmas lunch in Cottingham



Received shoebox hampers

Included in our guest speaker rota, receiving talks from KCOM, Emotional Wellbeing Hub, Healthwatch & Age UK HEY services



In Brough, East Riding, working with dedicated and committed volunteers, we were able to commence our first solely volunteer led social group. In the period they delivered:

26 sessions – with an average of 22 clients per session

Hosted a talk by Wendy Mitchell



There was initial support from East Riding of Yorkshire Council

Received shoebox hampers



They attended the Christmas lunch in Cottingham

The group has also been included in our guest speaker rota, receiving talks from KCOM, Emotional Wellbeing Hub, Healthwatch & Age UK HEY services

Social group

Case Study

Mrs D is a service user who doesn't just attend one of our groups, but also helps out at our group called "Feel Good Thursdays". She enjoys the social interaction and helping out with the washing up and the tea trolley!

However it wasn't always this way. Mrs D initially joined the group when her husband was in full-time residential nursing care. Sadly, he died and Mrs D was devastated and ceased coming to the social group. However, after a number weeks Mrs D came back to the social group, and it transformed her situation.



“

With my husband in residential care, I visited him every day, and after his passing it left such a big gap in my life. But I managed to pluck up the courage to come back to the social group and I hadn't realised how much I had missed it. The support from both the staff and the other people attending the group has helped to give me a sense of purpose again.

Mrs D

”

Mrs D has gone on to continue to be a regular attendee, and like many social group attendees has found that at times attending the social group has ensured she could quickly access the support she needed. Age UK HEY have helped Mrs D when she had a fall, accessing our support services, and we have also provided her with information and advice resulting in additional benefit claims and funding for a stair lift.

There are many, many Age UK HEY social group attendees with very similar stories to that of Mrs D. The groups provide not just a great range of activities at them, but also a “reason” for older people to come out of their house and make that journey. And the journey itself is beneficial in terms of the physical exercise and also the confidence it builds in breaking down barriers of isolation and loneliness.

Walking Football

The Age UK Hull and East Yorkshire walking football programme is all about helping older people in communities to keep active and to improve physical and mental wellbeing through playing the game. The sessions are open to anyone over the age of 50 regardless of ability or previous experience.



98 sessions were held across venues throughout the year, with an average attendance of over 14 people per session.

“ Whist still being able to play the ‘beautiful game’ is good – and I suppose the exercise is too – what we all really appreciate is the friendship and social opportunities it gives us. We might only be on the pitch for an hour – but we spend just as long in café afterwards with each other just talking about anything and everything!

Walking football attendee ”



Falls

Falls are a common, but often overlooked, cause of injury. Around one in three adults over 65 who live at home will have at least one fall a year, and about half of these will have more frequent falls.

The Age UK Hull & East Yorkshire Falls prevention team visit older people in their homes and carry out holistic risk assessments to identify any potential risks in the home as well as offer advice on how to prevent any further falls occurring. Our Team also go out into the community and offer information and advice to Social groups as well as other professionals working in Health and Social Care.

In the period our falls team achieved the below:



Falls Support and Prevention Services

Case Study 1

LS called our office after a family member recommended, they contact us, as they wanted some help in their bathroom due to reduced mobility issues. We made a referral to the CHCP falls team for a full assessment. LS has many complex health problems and with her husband looking after her needs she is now having to sleep downstairs – neither of them can get out unless for medical appointments and they are both now feeling isolated. After the full CHCP assessment, aids and adaptations were put into the house, with plans for further adaptations to be installed – all enabling LS and her husband to have far greater mobility about the house.

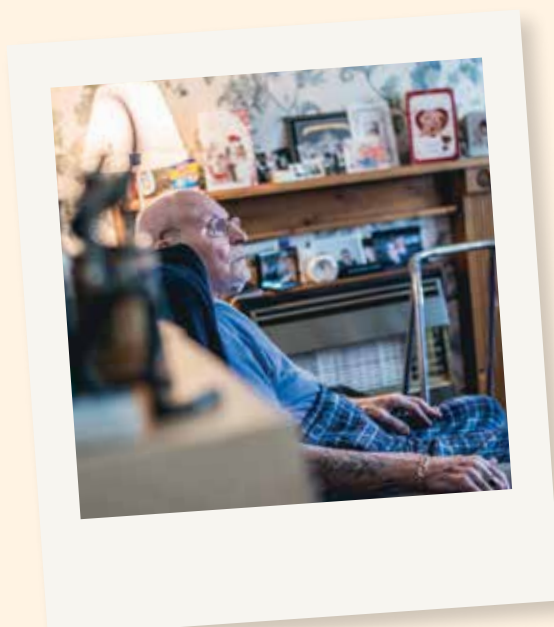
LS's husband was very happy with the help they have been provided with so far and thanked us for referring his wife to the CHCP Falls team as it has helped them a lot. And we also signposted the husband to CISS (Carers Information Support Service) for support and information on the Home Library service, as they find it hard to go out. We also discussed benefit entitlements, and they are aware we can support them both with such enquires should they wish.



Case Study 2

The Age UK HEY Information and Advice team were working with a service user who told them he had fallen several times. He has mental health problems, had attempted suicide several times and is receiving support for mental health problems. Whilst he has a history of falls, he had never had a falls assessment before, so we conducted one and a referral was made to CHCP falls team for a full assessment.

We followed up a few weeks later, as we do with all service users, and he was very happy. The falls team were coming to install some aids for him. He thanked us for all the help and contact we have made on his behalf and he is looking forward to being more independent and able to stay in his marital home, which he feels will help with his mental health as he has been anxious about his situation. We also encouraged him to consider accessing our befriending services and signposted him to HEY MIND and Lets Talk for further support.



IT and Biscuits

Delivered in partnership with KCOM, our IT & Biscuits sessions are all focused at helping older people to feel more confident online. Attendees have the opportunity to learn how to use the internet to stay in touch with friends and family, pay household bills and provide easy access to interests and information.

We also encourage older people to bring along whatever IT devices they may have and we help them to learn how to use them, learn what the devices are capable of and how to get best from them – all whilst remaining safe and secure whilst online.

From smart phones, to a slow PC/lap top to simply sending an email, our team of Age UK HEY staff and volunteers and expert staff from KCOM are getting more and more older people online, and safely. At a time when many services are going online - covering everything from banking, energy bills to accessing health services, there is such a critical need for services such as IT and Biscuits.

During 2023/2024 IT and Biscuits achieved:



12

Sessions delivered

13

Older people per session

4

KCOM staff per session

2

Age UK HEY volunteers per session



2. Home Support

At Age UK Hull & East Yorkshire, we pride ourselves on supporting and encouraging older people to live independently in their own homes. We have an established team of trusted, trained, and experienced Home Support Workers who older people can rely on to help them to continue to live independently in their own homes.

Over the 2023/24 period we have invested and developed our Home Support service and greatly increased the range of services we offer to include:



Cleaning



One-off spring clean



Laundry/ironing



Meal preparation



House sitting calls



Medication
prompting &
support



Shopping (with you
or for you)



Escorting you to
appointments - or
going for a coffee
& a chat



Walking your dog



Holiday packages
- support whilst
family/carers are
away

...and we simply tell people to just ask us, and we will see what we can do.

Cleaning people's homes is still the most commonly used service – with feedback from family members highlighting services such as shopping and escorting clients to appointments as really supporting them, taking some of the load off their shoulders when they are supporting their elderly loved ones.

This development has seen some amazing results:

- **6,976 hrs of support delivered**
- **143 individual customers**
- **17 members of staff now engaged**

We have also invested in the infrastructure and systems required to support such an expansion with the

recruitment of admin staff and implementation of a new CRM system. These developments have streamlined resource planning, payroll processes and invoicing. Enabling BACS payments and card payments over the phone has also reduced administration and sped up income collection. Future plans are to move to direct debit invoice payments – which many clients are already asking for.

The service is operated on a break-even basis, so service user charges are closely affected by changes such as inflationary pressures and changes to the national minimum wage. During this period charges were increased to maintain a break-even position and only 5 clients chose to cease the service as a result.



Home Support Case Study

A family member contacted us as their sister had become a recluse since getting long covid and was unable to go shopping for herself and was also too frightened to go out due to poor mobility and her mental health was severely impacted by this lack of mobility.

Visits were arranged once every 2 weeks, with our Home Support worker starting off by ordering the clients shopping via telephone and getting this delivered the following day. We chose to do it this way first as the client wanted to build rapport and trust with us and this successfully greatly reduced the client's anxiety. After a few months, the client was confident enough for our staff member to go and get their shopping for them and a few months later the client felt confident enough to go out shopping with us. These have turned into weekly shopping visits for the client and they are a lot more confident and far less anxious.

We did not at first think we would be able to support this client when they were first assessed as due to their mental health, anxiety and the frustration they were feeling it really difficult to break through when communicating with them.

However, all that was required was a little time and patience by our staff team, and we've been able to get this client to where they are today – both the client and her sister (who made the initial contact) are so much happier.



3. Befriending

Our Befriending service aims to reduce loneliness for older people by providing regular contact, made by a fully trained and supported Age UK Hull and East Yorkshire Volunteer Befriender. Contact is made in a variety of ways, with our focus being to engage and support the lonely older person in a way which suits them best.

Overall 372 individual service users accessed our befriending services during 2023/24.

Telephone Befriending Service

- The Telephone Befriending service aims to reduce loneliness by providing a regular telephone call, allowing the older person to enjoy general conversation on subjects that interest them.



Home Visiting Befriending Service

- This service provides support to older individuals who are housebound in the comfort of their own home. Our trained volunteers are matched to the service user and provide regular friendship visits with the aim of reducing the feelings of social isolation and loneliness.

Penpal Befriending

- Our Penpal befriending service matches older members of our community with pen friends who have common interests or simply share that feeling of excitement when a handwritten letter is posted through the door!
- We actively recruit older people to join Penpal Befriending, alongside other volunteers. Letters are sent monthly and writing sets are provided for those that need them.
- The Penpal service was very much in its infancy during 2023/24 however it has grown from strength to strength during the period, with 26 service users receiving regular letters.

Volunteers are at the core of all aspects of the Befriending service. Each Volunteer receives an induction and full training on befriending and listening skills, along with on-going regular supervision and support. Our team of volunteers delivered some amazing achievements during 2023/24:

14,846

total hours of
befriending support

6,188

hours in telephone
befriending – (42%)

8,658

hours in home visiting
befriending – (58%)

Befriending Service

Case Study 1

A son referred his Dad to us as he was worried about how lonely and isolated he was increasingly finding his Dad to be.

Mr W is 96 years old and lives with his wife, of the same age, who has dementia. Mr W struggles with his own mobility and also cares for his wife. As a result of her dementia Mrs W doesn't speak, leaving Mr W feeling very lonely and very frustrated. They have 3 children, who all live away, however one of them visits every weekend. Mr W wants to keep living in his own home with his wife and is afraid they may have to go into residential care but knows his wife wouldn't cope with the change, so they had arranged for carers to come and provide support.

We were able to match Mr W with a home visiting befriending volunteer, LH, who lived close by and also had experience of dementia as she helped care for her Grandma.

Regular visits soon started to take place.

The relationship between Mr & Mrs W and the volunteer LH quickly blossomed and Mr W thoroughly enjoys her weekly Friday visits. They cover all topics and it is clearly evident how much LH also enjoys her chats with Mr W too, hearing all his incredible stories. On Good Friday, LH brought Mr and Mrs W fish and chips at lunchtime, and they all sat at the table. Mr & Mrs W were incredibly grateful and thoroughly enjoyed it so they will be doing that again! Mrs W also has a relationship with LH and is comfortable in her presence, with LH helping her back to her chair when she is wandering.

As is the case with many volunteer befrienders, they often get almost as much out of their befriending activity as do the people they are spending time with.

Case Study 2

J is a Home Visiting Befriender who classes himself as young at heart, and he lives on his own so appreciates the difficulties this can bring. He has befriended a number of people, all with differing needs, and is happy to make a difference.

J was a volunteer at Hull Royal Infirmary as a Meet and Greeter but during Covid the position was stopped and never re started. John enjoyed meeting people and helping them around the hospital, so wanted to chat to different people who are lonely and isolated. Being a volunteer makes him feel fulfilled and the rewards of making a difference to someone else. He likes to have a purpose in life and a reason to get up in a morning keeping busy.

By becoming a befriender meant that J now had a purpose again since Covid. We have many people in need of company and J is very flexible and is happy to visit several people on his daily walks which means he has a purpose for a walk keeping him fit and healthy whilst doing good. J now has a number of

people he visits and even if they get admitted into hospital he visits them in there to keep the continuity and they see a familiar face. This also helps the family at visiting times. John is also visiting a lady who is in hospital long term and needed company as the family were at work and were unable to make daytime visits.

"I'm happy to visit anyone at home or in hospital, there are many older people who need my help"

John feels like he is making a big difference, and he enjoys chatting and making friends. And by being a volunteer he is also getting the benefits of what having a befriender gets.

He has made a real friend with one gentleman who lives near his home who are similar ages and have lots in common. **"He is a great chap and we have loads in common, he is very funny and we have a laugh".**

4. Information and Advice

Our Information and Advice service provides help and support for older people on a variety of issues, offering a free and confidential information and advice service for older people, their families, carers and partner agencies.

Our dedicated and trained team of professional advisors help assess and identify what benefits older people in need may be entitled to and then provide guidance and support in completing application for benefits claims. Attendance Allowance, Carers Allowance, Pension Credit, Housing Benefit and Cost of Living Grants form the core of the benefit claims support we offer.

The advice and support doesn't stop there – with our team also providing support upon a variety of areas of support including local services, crime prevention, utility/energy costs and efficiency measures, housing, health, care and social issues.



2023/24 has proven to be one of the most challenging years yet for our welfare advice service. Demand for support has risen significantly from across Hull city and especially from across the wider East Riding region.

Not only has the number of older people requiring support increased, but so has the complexity of their needs. This adds considerable strain to an already stretched and limited resource. We are increasingly finding that each service user enquiry is taking longer to deal with due to multiple areas of advice and support, which then necessitates more intensive follow ups and on-going support.

For the first time in a number of years we have had to close the service to new enquires several times during the 2023/24 period simply because of the scale and level of demand.

The extra pressure of supporting these clients has placed significant logistical and emotional demands upon our team of staff and volunteers. However, despite this the team have performed magnificently, and securing the resources to grow the team and develop further capacity is a priority for us during the next 12 months.

And even though we have faced such an unprecedented level of demand, we have yet again achieved some amazing results:



3136

Incoming enquiries were handled



1798

Clients were supported



360

Benefit assessment checks completed



234

Benefit application forms were supported

We can't emphasise enough the success and impact that this figure delivers. Our team of 2 advisors, supported by a small team of dedicated volunteers, are responsible for bringing in over £1.6 million of extra income into the region – this is then spent locally by those older people to live happy and independent later lives.

Our success not only represents a significant financial investment into Hull and East Yorkshire, but also delivers significant financial savings to the public purse. The service users accessing our support use the extra income to keep healthy - they can now get to health appointments and buy in the additional aids/support they need to continue living at home – this drastically reduces the demand these older people place upon local health services.

Building upon these successes we are aiming to raise the profile of this message of “prevention” and its wider impacts across the region, to firmly establish clear cases of support for further investment in this core area of our work.

Wills and Lasting Power of Attorney (LPA)

Working in partnership with local solicitors Brewer Wallace regular sessions are held at our offices where older people are able to access 30 minutes of free (no obligation) legal advice regarding wills and LPA.

This support has seen many older people then go on to seek formal legal advice regarding their wills or LPA and as a result tell us that they feel far more settled and comforted knowing that such sensitive matters have been dealt with.

£1,642,182
– value of benefits
secured for Hull
and East Yorkshire
residents

CAB Project

Working jointly with Hull and East Riding Citizens Advice Bureau we have recruited and trained volunteers, sharing them between organisations and building up their experiences and skills. With the CAB being more of generalist provider then volunteers get a good grounding in generalist advice work, where as their time at Age UK Hull and East Yorkshire develops specific skills and knowledge regarding older people.

Over time this has seen volunteer numbers grow across both organisations, with skills and knowledge developing further. After initial training then the volunteers then focus their interests and specialisms and a number have elected to focus time and energy with us at Age UK HEY, adding significant value and capacity to our Information and Advice teams work.



Information and advice

Case Study

A couple contacted Age UK HEY making enquiries about attendance allowance – a benefit to assist people with mobility and care needs. He was 80 and she 74 yrs old, they did not claim any disability benefits. Mrs F had tried applying for attendance allowance (AA) before, but as is often the case with many older people she did not know how to fill in the AA form so did not bother with it because it was so complicated.

Mr F cared for his wife, personally caring for her throughout the day and night. He used to help her dress, wash, do meals, medication etc, all whilst also managing to look after himself. They have no family in the area and Mrs F cannot go out on her own. She is in a lot of pain so takes a lot of medication to help with this. Mr F has to take her to all of her medical appointments and collects her medication as well.

Mrs F used to attend one of social groups but is now unable to attend because of her mobility problems, and rarely goes out. However she did remember that when attending the group she had heard about the help our Information and Advice service can, so she thought she would give us a try to see if we could help her and her husband.

Mrs F was awarded the higher rate of attendance allowance, giving them an extra income of £101.75 a week and was also given back pay of £1017. This additional income enables them to pay for taxi's to get to medical appointments and to go shopping. It has also given them the extra money to pay for a cleaner, a gardener and a chiropodist to visit their home.

With our advice and support Mr F contacted social services regarding getting aids and adaptations for the home and now has a walking stick, walking frame and successfully applied for a blue parking badge.



“

Thank you very much for your support. I would have never been able to do the attendance allowance form if you had not helped me. I could not do it before and we are very grateful for the way you helped us. Getting the attendance allowance makes a big difference to our weekly income.

Mr F

”

Mr & Mrs F now know to come back to us in the future if they ever need help and we have improved their quality of life. They've both told us they will pass on the details of Age UK HEY to other people, and we know from experience that this really does encourage others to come to us for help.

Sadly, this is far from a one-off set of circumstances. We regularly come across clients who don't know what support they may be entitled to and how to apply for benefit support as it can often be very complicated.

Volunteers

Volunteers underpin every element of our work.

Everyday volunteers are in our offices helping with everything from answering the phones, administration, filing and delivering vital information and advice support to older people.

Our social groups operate every day of each week, and many are supported by volunteers working alongside paid staff. This year two entirely volunteer led social groups have developed, and this has enabled us to reach and support older people in areas of East Yorkshire which wouldn't have been possible without volunteers.

We have also partnered with a number of local businesses delivering a range of employee volunteering opportunities – an area we are developing further in 2024/25.



And everything else...

Whilst all the core areas of activity are busy delivering the services and support local older people need – we have also been doing many of things too:

Christmas lunches

Meals were held in Hull and East Yorkshire providing isolated older people the opportunity to come together for a meal and share in fellowship and entertainment along with festive food. Over 170 older people attended and we were very thankful for the support of KCOM staff volunteers and our own volunteers and trustees for their support at these events - and we have plans to significantly expand the numbers in 2024.

“Thank you for the lovely time we had at Christmas. What a surprise, free raffles and the hampers. You must be really proud of your staff for the wonderful work they do and the volunteers”.

Nora





Christmas shoebox appeal

935 shoe boxes all containing a range of special gifts and useful everyday items were distributed to vulnerable older people across the region. We had 9 collection points and an army of both our own volunteers and from local business, especially Smith and Nephew and KCOM, checked and packed and helped distribute a record number of shoe boxes. In 2024 we are aiming to exceed the 1000 shoebox milestone!

“Thank you so much for the beautiful box my mum received from you. She was overwhelmed. Thank you so much”.

“One lady was so overcome by the kindness she was in tears”

Volunteer distributor

York Ebor Races

We were shortlisted to win £10,000 as part of the Sky Bet Community Fund awarded at the York Ebor Race Festival. We didn't win the main prize but came home with a £1,000 cheque - CEO had a wonderful day out with one of our longest serving volunteers on ladies day, and two senior managers enjoyed the main Ebor race day - all courtesy of the Sky Bet Community Fund.

East Riding VCSE Collaborative

The CEO has played an active role in the innovative and developmental collaborative, initiated by HEY Smile. The collaborative is working strategically to lobby, influence and bring about change across East Riding and strengthen the role and raise the profile of the VCSE sector as a whole. The Age UK HEY CEO sits on the collaborative board representing 'Adults and Older People'.

Staff Training

We value, support and invest in our team – creating opportunities for staff to share knowledge and experience with each other and also investing in external training opportunities for all. This year our CEO became a Clore Fellow via their Experienced Leader Programme and also is undertaking training to be a coach.

Also a number of other staff have been supported to step up into leadership opportunities within the charity and to underpin this we have enabled them to engage in new to leadership and emerging leadership training opportunities.

Relocation

Towards the end of the year we were finally able to identify a new office base to relocate to. It will mean moving out of the city centre, however it provides much needed space for our expanding services and a far more welcoming and usable space to provide face to face services to older people. It will also provide an excellent foundation upon which to take the charity forward on the next stage of our development.



Trustees' Report

The Trustees present their annual report together with the audited financial statements of the Charity for the year 1 April 2023 to 31 March 2024.

The Trustees confirm that the annual report and financial statements of the Charity comply with the current statutory requirements, the requirements of the Charity's governing document and the provisions of the Statement of Recommended Practice (SORP), 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) as amended by Update Bulletin 1 (effective 1 January 2015).

Age UK Hull is a charity and registered company which is governed by a board of Trustees.

Objectives and Activities

Taking account of the needs of older people within the charity's area of benefit are central to the trustees' approach to setting objectives and planning for activities. The Trustees have given due consideration to general guidance published by the Charity Commission relating to public benefit, including the guidance 'Public benefit: running a charity (PB2)'.

Our vision is: "For all older people to live gratifying sustainable independent later lives".

Our mission in pursuing that vision is to: "Ensure that older people get the services and support they need where and when they need them."

As Age UK Hull we are the only organisation in the region with a focus on older people and their needs. We are uniquely best placed to ensure that the older people of the region get the services they need where and when they need them.

The Trustees' report details how these objectives were achieved in 2023/24 through the provision of our charitable services, which we are continuing to deliver during 2024/25.

Financial Review

Principal funding sources

Most of our services are delivered under contract or through grant aid. We continue to be extremely grateful to everyone who funds us to support older people in Hull and East Yorkshire.

Reserves policy

Age UK Hull Board of trustees has reviewed the amount of reserves it regards as a minimum prudent requirement and has concluded that provision for six months administration, public education and fundraising costs is sufficient. This would allow time to manage cost reductions or fund appeals as required whilst minimising the impact on service provision.

Based on the forecast for 2024/25, the desired minimum reserve level is approximately £300,000. As at 31 March 2024, free reserves less amounts held as fixed assets stands at £640,315. Additional funds are to be utilised for additional service enhancement, building capacity and expanding the public information programme going forward.

Structure, Governance and Management

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

The Company's governing document is its Memorandum and Articles.

Organisational structure

The body responsible for the general control and management of the Charity is the Board of Trustees.

A nominated Trustee advises and liaises with senior managers on matters of finance, personnel, health & safety, volunteering and fundraising.

The Trustees delegate the day-to-day management of the charity to an executive team which executes the policies and strategies defined by the board.

Membership of the Board

The Board comprises 5 Trustee members (a quorum of 3) and meets a minimum of 4 times a year. The Board are actively recruiting trustees.

Method of appointment or election of trustees:

New Trustees are recruited and appointed using various methods. These methods include advertising, networking and by making a direct approach to people that might be interested and have necessary skills and experience. Age UK Hull's Policies and Procedures in respect of Trustee recruitment and development are thorough and include key elements relating to services and activities, legislation, equal opportunities and diversity.

Risk management

The Trustees have overall responsibility for ensuring that the Charity has appropriate systems of internal controls across the entire organisation of Age UK Hull. 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 systems of internal control are designed to provide reasonable assurance against material misstatement or loss. Internal control processes implemented by the Trustees include:

- Assurance to donors and beneficiaries that there are appropriate systems in place to ensure that the resources of the Charity are effectively allocated and utilised.
- A strategic plan and an annual budget approved by the Trustees.
- Regular consideration by the Trustees of financial results, variances from budgets, forecasts, and performance indicators.
- Delegation of authority and segregation of duties.
- Identification and management of risk.
- Although there no requirement for an audit under the companies act the trustees do

The Trustees have in place a formal risk management process to assess and document risks and implement risk management strategies. This process includes review by Trustees, Chief Executive Officer and the Executive Team. The process identifies the types of risks the Charity faces, prioritises them in terms of likelihood of occurrence and potential impact and identifies the means of mitigating these risks. Risk management is embedded in the day-to-day processes of the Charity.

The Risk Management Plans also aim to safeguard the staff and volunteers, customers and the Charity's reputation. Age UK Hull ensures that staff are trained and properly supported, that there is a Safeguarding Policy in place for older people using the services and that adequate personal, public and professional liability insurance is in operation.

Reference and administrative details

Registered Company number – 04792749 (England and Wales)

Registered Charity number – 1101418

Registered office:

Axida House,
350 Preston Road
Hull HU9 5HH

Trustees

- Peter David Duffield LLB FCA
- Jayne Mansfield
- Rebecca Howes
- Daniel James Gladstone – resigned 09/10/23
- Jillian Louise Gledhill – resigned 17/12/23
- Fred Owen – appointed 08/04/24
- Julie Mills – appointed 21/10/24

Auditors

Smailes Goldie
Regents Court
Princess St
Hull
HU2 8BA

Solicitors

Rollits
Citadel House
High Street
Hull
HU1 1QE

Bankers

Bank of Scotland
33 Old Broad Street
PO Box 100
BX2 1LB

Statement of Trustees' Responsibilities

The trustees (who are also the directors of Age UK Hull for the purposes of company law) are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting 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 those financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity 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;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and to 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.

In so far as the trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware; and
- the trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

Report of the trustees, incorporating a strategic report, approved by order of the board of trustees, as the company directors, on 21st October 2024 and signed on the board's behalf by:

Peter David Duffield LLB FCA

Chair of Trustees

Statement of Financial Activities

for the year ended 31st March 2024

		2024	2023
		Unrestricted funds	Total funds
	Note	£	£
INCOME AND ENDOWMENTS FROM			
Donations and legacies	2	38,119	53,150
Charitable activities	3		
Charitable activities		487,515	375,963
Total		525,634	429,113
EXPENDITURE ON			
Charitable activities	4		
Charitable activities		592,383	500,890
NET INCOME / (EXPENDITURE)		(66,749)	(71,777)
RECONCILIATION OF FUNDS			
Total funds brought forward		734,920	806,697
TOTAL FUNDS CARRIED FORWARD		668,171	734,920

Balance Sheet

For the year ended 31 March 2024

		2024	2023
		Unrestricted funds	Total funds
	Note	£	£
FIXED ASSETS			
Tangible assets	10	27,769	28,838
Investments	11	87	87
		27,856	28,925
CURRENT ASSETS			
Debtors	12	31,784	28,846
Cash at bank		704,738	801,766
		736,522	830,612
CREDITORS			
Amounts falling due within one year	13	(49,246)	(66,211)
NET CURRENT ASSETS		687,276	764,401
TOTAL ASSETS LESS CURRENT LIABILITIES		715,132	793,326
CREDITORS			
Amounts falling due after more than one year	14	(46,961)	(58,406)
NET ASSETS		668,171	734,920
FUNDS	16		
Unrestricted funds		668,171	734,920
TOTAL FUNDS		668,171	734,920

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31st March 2024. The members have not deposited notice, pursuant to Section 476 of the Companies Act 2006 requiring an audit of these financial statements.

The trustees acknowledge their responsibilities for:

- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

These financial statements have been audited under the requirements of Section 145 of the Charities Act 2011.

The financial statements were approved by the Board of Trustees and authorised for issue on 18th December 2024 and were signed on its behalf by:

Peter David Duffield LLB FCA

Chair of Trustees

Cash Flow Statement

For the year ended 31 March 2024

		2024	2023
	Note	£	£
CASH FLOWS FROM OPERATING ACTIVITIES			
Cash generated from operations	1	(80,079)	104,826
Interest paid		(1,460)	(1,254)
		<u>(81,539)</u>	<u>103,572</u>
Net cash (used in)/provided by operating activities			
CASH FLOWS FROM INVESTING ACTIVITIES			
Purchase of tangible fixed assets		(4,043)	(10,135)
		<u>(4,043)</u>	<u>(10,135)</u>
Net cash used in investing activities			
CASH FLOWS FROM FINANCING ACTIVITIES			
Loan repayments in year		(12,000)	(12,000)
Interest Paid		554	651
		<u>(11,446)</u>	<u>(11,349)</u>
Net cash used in financing activities			
CHANGE IN CASH AND CASH EQUIVALENTS IN THE REPORTING PERIOD		(97,028)	82,088
CASH AND CASH EQUIVALENTS AT THE BEGINNING OF THE REPORTING PERIOD		801,766	719,678
CASH AND CASH EQUIVALENTS AT THE END OF THE REPORTING PERIOD		704,738	801,766

Notes to the Cash Flow Statement

For the year ended 31 March 2024

1. Reconciliation of net expenditure to net cash flow from operating activities

	2024	2023
	£	£
NET (EXPENDITURE)/INCOME FOR THE REPORTING PERIOD (AS PER THE STATEMENT OF FINANCIAL ACTIVITIES)	(66,749)	(71,777)
Adjustments for:		
Depreciation charges	5,113	4,663
Interest paid	1,460	1,254
Gains/Losses on Investments	-	28
(Increase)/decrease in debtors	(2,938)	142,427
(Decrease)/increase in creditors	(16,965)	28,231
Net cash (used in)/provided by operations	(80,079)	104,826

2. Analysis of changes in net funds

	At 1.4.23	Cash flow	At 31.3.24
	£	£	£
NET CASH			
Cash at bank	801,766	(97,028)	704,738
	<u>801,766</u>	<u>(97,028)</u>	<u>704,738</u>
DEBT			
Debts falling due within 1 year	(12,000)	-	(12,000)
Debts falling due after 1 year	(58,406)	11,445	(46,961)
	<u>(70,406)</u>	<u>11,445</u>	<u>(58,961)</u>
Total	<u>731,360</u>	<u>(85,583)</u>	<u>645,777</u>

Notes to the Financial Statements

For the year ended 31 March 2024

1. Accounting policies

Basis of preparing the financial statements

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention, with the exception of investments which are included at market value.

Critical accounting judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. This includes the choice of depreciation method applied to fixed assets and provisions for legacies. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

Income

Income received for services provided is accounted for on an accruals basis.

Cash donations, gifts and legacies are included in full in the income and expenditure account as they are received. Any significant non-cash donations are included in the income and expenditure account at the trustees' estimate of their market value when received. The value of voluntary help is not included in the accounts.

Grants and other funding of revenue nature are deferred and released to the income and expenditure account over the period to which they relate.

Bank interest is included in the income and expenditure account on an accruals basis.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category.

Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets

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

General Equipment - 10% on cost
Fixtures and fittings - 10% on cost

Taxation

The charity is exempt from corporation tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

Financial instruments

Financial instruments are classified and accounted for, according to the substance of the contractual arrangement, as financial assets, financial liabilities or equity instruments. An equity instrument is any contract that evidences a residual interest in the assets of the company after deducting all of its liabilities.

Trade and other debtors are recognised initially at transaction price less attributable transaction costs. Trade and other creditors are recognised at an initial transaction price plus attributable transaction costs. Subsequent to initial recognition they are measured at amortised cost using the effective interest method, less an impairment loss in the case of trade debtors.

Investments

Investments both current and fixed are included at fair value within the accounts.

2. Donations and legacies

	2024	2023
	£	£
Donations	20,070	11,185
Legacies	18,049	41,965
	38,119	53,150

3. Income from charitable activities

		2024	2023
		£	£
Grants	Charitable Activities	331,272	278,400
Fees charged to clients	Charitable Activities	156,243	97,563
		487,515	375,963

Grants in the year included above are as follows:

	£
District/City Council	115,635
Age UK National	39,115
Two Ridings Community Foundation	67,430
National Lottery	74,773
KCOM Partnership	8,333
Charitable Trusts	25,986
	331,272

4. Charitable activities costs

	Direct costs	Support costs (see note 5)	Totals
	£	£	£
Charitable activities	487,229	105,154	592,383

5. Support costs

	Management	Finance	Governance costs	Totals
	£	£	£	£
Charitable activities	52,291	1,459	51,404	105,154

6. Net income/(expenditure)

Net income/(expenditure) is stated after charging/(crediting):	2024	2023
	£	£
Auditors' remuneration	8,880	6,000
Depreciation – owned assets	5,112	4,664

7. Trustees' remuneration and benefits

There were no trustees' remuneration or other benefits for the year ended 31st March 2024 nor for the year ended 31st March 2023.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31st March 2024 nor for the year ended 31st March 2023.

8. Staff costs

	2024	2023
	£	£
Wages and salaries	396,989	337,862
Social security costs	21,729	7,534
Other pension costs	6,475	4,507
	425,193	349,903

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

	2024	2023
Administrative and support	6	6
Charitable Activities	23	17
	29	23

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

9. Comparatives for the statement of financial activities

	Unrestricted funds £
INCOME AND ENDOWMENTS FROM	
Donations and legacies	53,150
Charitable activities	
Charitable activities	375,963
Total	429,113
EXPENDITURE ON	
Charitable activities	
Charitable activities	500,890
NET INCOME/(EXPENDITURE)	(71,777)
RECONCILIATION OF FUNDS	
Total funds brought forward	806,697
TOTAL FUNDS CARRIED FORWARD	734,920

10. Tangible fixed assets

	Fixtures and fittings £	General equipment £	Totals £
COST			
At 1st April 2023	40,531	36,497	77,028
Additions	1,200	2,843	4,043
At 31st March 2024	41,731	39,340	81,071
DEPRECIATION			
At 1st April 2023	31,410	16,780	48,190
Charge for year	1,103	4,009	5,112
At 31st March 2024	32,513	20,789	53,302
NET BOOK VALUE			
At 31st March 2024	9,218	18,551	27,769
At 31st March 2023	9,121	19,717	28,838

11. Fixed asset investments

	Listed investments £
MARKET VALUE	
At 1st April 2023 and 31st March 2024	87
NET BOOK VALUE	
At 31st March 2024	87
At 31st March 2023	87

There were no investment assets outside the UK.

12. Debtors: amounts falling due within one year

	2024 £	2023 £
Trade debtors	19,368	19,764
Prepayments and accrued income	12,416	9,082
	31,784	28,846

13. Creditors: amounts falling due within one year

	2024	2023
	£	£
Other loans (see note 15)	12,000	12,000
Trade creditors	10,784	7,138
Social security and other taxes	8,244	6,809
Accruals and deferred income	18,218	40,264
	49,246	66,211

14. Creditors: amounts falling due after more than one year

	2024	2023
	£	£
Other loans (see note 15)	46,961	58,406

Other loans is the amount of the loan from Hull City Council that is not repayable until after more than one year from the balance sheet date. The loan is repayable at £12,000 per annum and will be repaid by 31 March 2029.

15. Loans

An analysis of the maturity of loans is given below:

	2024	2023
	£	£
Amounts falling due within one year on demand:		
Other loans	12,000	12,000
Amounts falling between one and two years:		
Other loans – 1-2 years	24,000	24,000
Amounts falling due between two and five years:		
Other loans – 2-5 years	22,961	34,406

16. Movement in funds

	At 1.4.23	Net movement in funds	At 31.3.24
	£	£	£
UNRESTRICTED FUNDS			
General fund	734,920	(66,749)	668,171
TOTAL FUNDS	<u>734,920</u>	<u>(66,749)</u>	<u>668,171</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
UNRESTRICTED FUNDS			
General fund	525,634	(592,383)	(66,749)
TOTAL FUNDS	<u>525,634</u>	<u>(592,383)</u>	<u>(66,749)</u>

Comparatives for movement in funds:

	At 1.4.22	Net movement in funds	At 31.3.23
	£	£	£
UNRESTRICTED FUNDS			
General fund	806,697	(71,777)	734,920
TOTAL FUNDS	<u>806,697</u>	<u>(71,777)</u>	<u>734,920</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
UNRESTRICTED FUNDS			
General fund	429,113	(500,890)	(71,777)
TOTAL FUNDS	<u>429,113</u>	<u>(500,890)</u>	<u>(71,777)</u>

A current year 12 months and prior year 12 months combined position is as follows:

	At 1.4.22	Net movement in funds	At 31.3.24
	£	£	£
UNRESTRICTED FUNDS			
General fund	806,697	(138,526)	668,171
TOTAL FUNDS	<u>806,697</u>	<u>(138,526)</u>	<u>668,171</u>

A current year 12 months and prior year 12 months combined net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
UNRESTRICTED FUNDS			
General fund	954,747	(1,093,273)	(138,526)
TOTAL FUNDS	<u>954,747</u>	<u>(1,093,273)</u>	<u>(138,526)</u>

17. Related party disclosures

During the year to 31 March 2024, Age UK Hull was supplied with IT hardware, software and support services from Jupiter IT Solutions Limited, of which Mr D J Gladstone is a director of. The total of services charged until Mr D J Gladstone resigned as trustee on 9 October 2023 was £9,852. These transactions were all at arms length.

18. Limited by guarantee

The company is limited by guarantee.

Detailed Statement of Financial Activities

For the year ended 31 March 2024

	2024 £	2023 £
INCOME AND ENDOWMENTS		
Donations and legacies		
Donations	20,070	11,185
Legacies	<u>18,049</u>	<u>41,965</u>
	38,119	53,150
Charitable activities		
Grants	331,272	278,400
Fees charged to clients	<u>156,243</u>	<u>97,563</u>
	487,515	375,963
Total incoming resources	525,634	429,113

EXPENDITURE**Charitable activities**

Wages	396,989	331,649
Social security	21,729	-
Pensions	6,475	1,435
Telephone	7,003	7,781
Postage and stationery	7,231	4,288
Premises	3,137	186
Office Costs - IT	9,884	1,579
Professional Fees	11,657	3,408
Staff Costs	5,522	4,474
Other Expenses	16,498	23,777
Fixtures and fittings	1,104	1,014
	487,229	379,591

2024 **2023**

£ **£**

SUPPORT COSTS

Wages	-	6,213
Social security	-	7,534
Pensions	-	3,072
Postage and stationery	1,470	473
Sundries	2,677	1,178
Office Costs - IT	1,435	87
Premises	30,976	26,730
Staff Costs	2,882	547
Professional Fees	8,842	9,326
Computer equipment	4,009	3,650
	52,291	58,810

FINANCE

Bank charges	1,459	1,254
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Governance costs

Auditors' remuneration	8,880	6,000
Accountancy and legal fees	42,524	55,235
	51,404	61,235
Total resources expended	592,383	500,890
Net expenditure	(66,749)	(71,777)

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350 Preston Road, Hull HU9 5HH

www.ageuk.org.uk/hull

Report of the Independent Auditors to the Trustees of Age UK Hull

Opinion

We have audited the financial statements of Age UK Hull (the 'charitable company') for the year ended 31st March 2024, which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31st March 2024 and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditors' responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information included in the Annual Report, other than the financial statements and our Report of the Independent Auditors thereon.

Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters where the Charities (Accounts and Reports) Regulations 2008 requires us to report to you if, in our opinion:

- the information given in the Report of the Trustees is inconsistent in any material respect with the financial statements; or
- the charitable company has not kept adequate accounting records; or
- the financial statements are not in agreement with the accounting records and returns; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of trustees

As explained more fully in the Statement of Trustees' Responsibilities, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Our responsibilities for the audit of the financial statements

We have been appointed as auditors under Section 145 of the Charities Act 2011 and report in accordance with the Act and relevant regulations made or having effect thereunder.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue a Report of the Independent Auditors that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are

considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

Our approach to identifying and assessing the risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, was focused on specific laws and regulations which we considered may have a direct material effect on the financial statements or the operations of the company, including the Companies Act 2006, tax legislation, data protection, anti-bribery, employment, environmental and health and safety legislation. An understanding of these laws and regulations and the extent of compliance was obtained through discussion with management and inspecting legal and regulatory correspondence.

We assessed the susceptibility of the company's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by making enquiries of management and considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations.

To address the risk of fraud through management bias and override of controls, we:

- performed analytical procedures to identify any unusual or unexpected relationships;
- tested journal entries to identify unusual transactions;
- assessed whether judgements and assumptions made in determining the accounting estimates were indicative of potential bias; and
- investigated the rationale behind significant or unusual transactions.

In response to the risk of irregularities and non-compliance with laws and regulations, we designed procedures which included, but were not limited to:

- agreeing financial statement disclosures to underlying supporting documentation;
- reading the minutes of meetings of those charged with governance;
- enquiring of management as to actual and potential litigation and claims; and
- reviewing correspondence with relevant regulators and the company's legal advisors.

Due to the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. Auditing standards also limit the audit procedures required to identify non-compliance with laws and regulations to enquiry of the directors and other management and the inspection of regulatory and legal correspondence, if any.

The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission, or misrepresentation.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our Report of the Independent Auditors.

Use of our report

This report is made solely to the charitable company's trustees, as a body, in accordance with Part 4 of the Charities (Accounts and Reports) Regulations 2008. Our audit work has been undertaken so that we might state to the charitable company's trustees those matters we are required to state to them in an auditors' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Smailes Goldie
Chartered Accountants
Statutory Auditor

Eligible to act as an auditor in terms of Section 1212 of the Companies Act 2006

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18th December 2024