

**UNAUDITED FINANCIAL STATEMENTS  
FOR THE YEAR ENDED  
31 MARCH 2024**

**FOR**

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS  
AGE CONNECTS NEATH PORT TALBOT**

Bevan Buckland LLP  
Ground Floor Cardigan House  
Castle Court  
Swansea Enterprise Park  
Swansea  
SA7 9LA

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

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FOR THE YEAR ENDED 31 MARCH 2024**

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**AGE CONCERN NEATH PORT TALBOT  
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**REFERENCE AND ADMINISTRATIVE DETAILS  
FOR THE YEAR ENDED 31 MARCH 2024**

<b>TRUSTEES</b>	D Jones B Trahar L Veale Mrs S Penry Mrs T Davies F P Prosser Mrs S Freeguard Ms K A Shaw
<b>COMPANY SECRETARY</b>	D A Richards
<b>REGISTERED OFFICE</b>	37-38 Alfred Street Neath West Glamorgan SA11 1EH
<b>REGISTERED COMPANY NUMBER</b>	04193486 (England and Wales)
<b>REGISTERED CHARITY NUMBER</b>	1105203
<b>INDEPENDENT EXAMINER</b>	Bevan Buckland LLP Ground Floor Cardigan House Castle Court Swansea Enterprise Park Swansea SA7 9LA

**AGE CONCERN NEATH PORT TALBOT (REGISTERED NUMBER: 04193486)  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 31 MARCH 2024**

The trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the year ended 31 March 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

**OBJECTIVES AND ACTIVITIES**

**Objectives and aims**

**Age Connects Neath Port Talbot's Charitable Object**

"To promote the relief of elderly people in any manner which now or hereafter may be deemed by law to be charitable in and around Neath Port Talbot County Borough and the City and County of Swansea".

**Mission Statement**

"To provide community-based services that facilitate social inclusion, while promoting a healthy and active retirement and continuing independence for the older citizens of Neath Port Talbot and Swansea".

**Corporate Priorities 2020 - 2025**

- Prevent poverty and maximise income in retirement.
- Promote health, independence and wellbeing for all older people.
- Achieve greater social inclusion of the most disadvantaged older people and challenge the causes of exclusions.
- Promote age equality and enable older people to make full contributions as active citizens to the local economy and community.
- Continuous improvement through user consultation, monitoring of quality standards and innovation based on evidence of best practice.
- Develop and implement a strategy to build Reserves, and ensure the charity becomes more sustainable and less reliant on short term funding.

**Delivery Strategy**

Through our marketing efforts and outreach delivery strategy, we aim to make our services as accessible as possible to older people from across our area of benefit. Information from Age Connects Neath Port Talbot's Charitylog content management system/database is cross referenced and analysed extensively, providing a firm basis for forward planning and allows us to identify and respond to gaps in service provision.

We continue to offer differing levels of support according to individual need. This ranges from the provision of information and advice through our telephone helpline, network of neighbourhood information points, Positive Ageing Ambassadors, website, social media platforms, special events and talks, through to participation in our Community Outreach Hubs, health promotion activities, befriending groups, Good Neighbour Schemes and on-going welfare benefits and advocacy casework. Service users can access our free services through home visits, one to one appointments, drop-in service, social media platforms, website and/or by visiting our community outreach locations.

**Public benefit**

When planning our activities for the year, we have once again focused our activities on providing accessible community-based services that facilitate social inclusion, while promoting a healthy and active retirement and continuing independence for the older people. We continue to work closely with all our partners to address identified needs within the strategies of the Local Authority and Welsh Assembly Government. Age Connects Neath Port Talbot has two main areas of charitable activity for public benefit: (1) Independent Information, Advice and Advocacy and (2) Health and Wellbeing.

REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 31 MARCH 2024

ACHIEVEMENT AND PERFORMANCE

Information, Advice and advocacy

Performance Indicators

Total number of face-to-face contacts	>6,500
Welfare benefits accessed	>£1,200,000
Volunteer hours	>8,000
Volunteer in-kind support, nominally valued at	£100,000
Foot Care Appointments	2,355

A grant from Neath Port Talbot County Borough Council contributes to the costs of operating our telephone helpline and delivering our county wide information and advice service. The shortfall is made up from fundraising activities and contributions from our general funds.

Telephone Helpline

Calls to our telephone helpline remain the most popular method of contact for service users. Our call monitoring system shows **that we handled 14,195 calls**. Our helpline is available to service users and partner organisations between the hours of 08:30am to 4:30pm Monday to Friday. The most popular reasons telephone calls have included:

- Information and advice/welfare benefits - given the extremely challenging environment and ongoing cost of living crisis, information and advice with particular emphasis on income maximisation and welfare benefits have remained a significant area of support within our provision.
- Winter fuel/energy efficiency - this area continues to receive significant increase in demand for support, particularly through the autumn and winter seasons.
- Good Neighbour services - including a range of short term, practical support, reablement support and befriending services to reduce loneliness/isolation.
- Foot Care Service - this year has once again managed an increase in calls from those unable to manage their own foot care and/or are experiencing poor foot health.

Website

Our website remains an integral part of our information and advice service and is regularly updated to include seasonal events and campaigns. Once again, the website proved an extremely useful source of relevant information, advice and available support/services. This was reflected in our web statistics this year where we experienced **over 5,405 users** and over **11,150 page visits**.

Social Media

The continued growth and popularity of social media with both individuals and organisations has provided us with effective marketing/media tools that we will continue to develop throughout 2024/25. During the year, we have increased efforts to promote our services which has once again led to increased direct communications with service users and their families via this platform. Currently on Facebook, we have a five-star rating, have over 1,200 followers and over 1,000-page likes. We also have over 520 followers on X and plan to utilise these platforms further in the coming months.

HOPE Advocacy Project

HOPE is a partnership project between Age Cymru, Age Cymru local partners and Age Connects Wales partners across the whole of Wales. It is funded by Welsh Government to deliver independent advocacy for older people (50+) and carers across Wales. This service supports people to engage, participate, gain information, have their voices heard, understand their rights, make choices, be involved, share experiences, raise awareness of advocacy, and develop skills and knowledge. HOPE delivers advocacy support at a community level through a range of advocacy models by recruiting, training and supporting project volunteers. HOPE supports service users at an early stage in their issues/concerns to help prevent them reaching crisis points and includes a training programme which enables advocates across Wales to further develop their skills and knowledge, whilst also offering training opportunities and workshops to other professionals who would benefit from greater awareness of advocacy.

**AGE CONCERN NEATH PORT TALBOT (REGISTERED NUMBER: 04193486)  
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**Talks Programme**

Our community-based talks programme has once again been available and utilised by several older person's groups/clubs/societies and partnership organisations across the county borough, with increased demand from Swansea based partners/organisations. Talks and demonstrations have been delivered on general Age Connects Neath Port Talbot services, but following on from the previous year's pattern, has involved an increased demand for support around winter wellbeing, energy efficiency and our Local Energy Action Partnership (LEAP) service. Smaller scale and more direct/responsive talks have also taken place during Community Outreach Hub activities and within team meetings in health and social care teams.

**Income Maximisation**

We have maintained our Department for Work and Pensions (DWP) 'Alternative Office' status and will continue to adhere to all the required policies. Holding this important status has various benefits including allowing the first date of contact with the Alternative Office to be considered when deciding the start date of entitlement. It also allows streamlining of the process, as the application can go directly to the DWP decision maker with all supporting evidence already verified.

Many vulnerable older people that are living on State Pension may be entitled to extra financial support and there are a range of benefits and allowances which can make their lives easier and more comfortable. However, the downside of this is that claiming such entitlements starts with filling out lengthy and often complex forms. As a result, each year millions of pounds of benefits go unclaimed by older people. We received minimal funding to run our Welfare Rights programme during 2023/24, which includes benefit checks, form completion, review forms and mandatory reconsiderations support. Additional service users received support relating to appeals procedures and specialist advice/guidance. In addition to the **£1.2 million raised** in previously unclaimed benefits, a significant number of service users also accessed severe disability premiums, pension credit payments, council tax deductions and assistance with rent payments.

**Legal Services**

We do not currently have a formal partnership with local solicitor firms for provision of a suite of legal services, but plan to develop a new structure and support service in the near future. Service users have been able to access some support to access limited free Wills campaigns and information/advice on important legal services such as Power of Attorney and Probate from our informal partnerships with local companies.

**Neighbourhood Information Points**

We have maintained a network of Neighbourhood Information Points in urban and rural locations across the county borough. These are strategically placed information stands that display our telephone helpline number and a range of printed information and resources.

**Keep Well this Winter**

Despite having no designated grant funding in the winter of 2023/24, we continued to offer the most up to date information and advice for service users. We circulated and provided leaflets, provided advice and support on home energy efficiency and keeping warm and well via our telephone helpline, digital platforms/social media and via home visiting services. Following the introduction of our Local Energy Action Partnership (LEAP) energy efficiency service last year, (please see page 6 for further details) we have been able to provide more specialist support and assist with the provision of vital appliances and heating systems.

**REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 31 MARCH 2024**

**ACHIEVEMENT AND PERFORMANCE**

**Health and Well-being**

**Community Outreach Services**

Our network of Community Outreach Hubs and associated community volunteering activities continue to be delivered in principal community locations across the borough. These seek to support older people in as diverse a way as possible in meeting their physical, emotional, social and financial wellbeing needs. Our Outreach Hubs are designed to ensure older people experiencing the highest levels of disadvantage, isolation, loneliness and deprivation associated with reduction of facilities, service eligibility changes, poverty and digital exclusion can access meaningful support services.

The hubs operated by paid staff and supported by volunteers meet weekly in each area to provide a holistic and cost-effective early intervention activity programme to improve older people's health and reduce dependency, whilst also reducing reliance upon expensive or intensive care provision. Outreach hub activities and services aim to maintain and improve the confidence, self-esteem, choice/control, independence and physical/emotional wellbeing of some of the most isolated older people in the Borough. The overall aim is always to facilitate and enable older people to engage at a community level via outreach hubs and community-based activities, whilst helping local older people to be more resilient in the future, deal with transition and/or crisis points in their lives and prepare for the future. The principal issues our outreach and associated community activities seek to address are:

**Tackling issues of disadvantage and hardship facing older people**

Our outreach events and associated referral to support services help older people reach services they may otherwise not have been able to. This includes help on accessing eligibility for benefits, support services in the home, visiting routine and preventative healthcare facilities and community befriending.

**Creating opportunities for social engagement**

Regular weekly outreach events actively provide a bridge between loneliness and social isolation towards positive social interaction. These cost-effective group sessions are promoted to allow older people to come together and gain social interaction benefits from guided group activities that builds valuable peer support and friendships.

**Improving individual quality of life and promoting independence**

Through our interventions we can prioritise preventative actions and measures that can significantly help older people who are struggling with their financial independence, maintaining their health and wellbeing or living in isolated, or degraded physical circumstances.

**Accessing information support and referral to sources of help**

The direct self-referrals received from older people at outreach events, as well as from those partners we work in collaboration with allow us to tackle head on providing support services. Outreach enables us to spread the support we offer well beyond the otherwise limited scope of promoting one-to-one contact.

**Integration with key priorities**

This is a critically important component of our intended outcomes. In this respect our services act to strengthen and complement capacity that ensures sustainable, safe, appropriate and accessible services/activities available for older people. This enables older people identified as needing preventative/early intervention services to directly benefit from access to our varied activity programme and specialist support.

**Maintaining the profile to support people with dementia within an ageing population**

This is a very important long-term outcome that is embodied within our Outreach Services, aiming to ensure long term continuity of support (see Dementia Connects below).

**Community level access**

This focuses on ensuring that preventative dementia measures are promoted, and that people with dementia and their families/carers can feel confident in the knowledge that support will be available in their community and through guidance, be tailored in an integrated manner to meet their specific needs, regardless of the agency or organisation providing a care support package or other associated service.

**REPORT OF THE TRUSTEES  
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**ACHIEVEMENT AND PERFORMANCE**

**Dementia Care Connects**

Our Dementia Care Connects Project falls within the Prevention and Community Coordination model of care, helping people to connect with and access community-based preventative and early intervention wellbeing activities. These activities help to improve and maintain physical and emotional wellbeing, whilst also helping to prevent escalation and the need for more intense health and social care provision. Whilst the service primarily focuses on prevention and early intervention, the service also encompasses those who are deemed at increased risk of dementia and those living with early stages of dementia.

Via the activities prescribed within our Dementia Care Connects initiative, we seek to identify known factors associated with the development of dementia, specifically interventions that identify older people where a higher risk factor is present. This includes those that are over 65 years of age, people who are experiencing feelings of loneliness and isolation, poor mental/emotional wellbeing, those that are physically inactive, have long term health conditions such as diabetes, high blood pressure and high cholesterol, suffer with sensory loss, live in deprived areas and maintain poor lifestyle choices such as smoking and alcohol use. Given the ageing population and demographics within the region, many of these risk factors are extremely prevalent, with many of our service users and target group experiencing multiple risk factors.

Service users engage in preventative activities that are designed to reduce many of the risk factors identified above. The project's core weekly sessions reduce loneliness and isolation through increased social interactions and improve both physical and emotional wellbeing through provision of regular physical activity, musical therapy, reminiscence, mindfulness, information and advice and creative sessions. The Dementia Care Connects Outreach Hubs also deliver talks, demonstrations and information (internal and external) that address lifestyle choices such as healthy eating, smoking, safe use of medications, screening and help to identify early signs of dementia to contribute to earlier diagnosis.

**Good Neighbour Scheme**

This service recognises the vital importance to older people of gaining access at a community level to information and support services relating to preventative measures associated with reducing the likelihood of requiring access to either urgent, or prescribed health or social care services. This tried and tested model is responding to a range of well evidenced needs facing older people and their carers around maintaining health and wellbeing and removing barriers for older people and those that care for them. The Good Neighbour Scheme provides support in the following categories:

- Reducing negative health and social care impacts upon disproportionately affected older people where local service reductions have taken place, causing raised levels of poor physical and mental wellbeing, disadvantage, isolation and poverty.
- Older people often living alone and hard to reach experiencing a range of health deficit conditions and often unmet needs placing them at an elevated risk of requiring urgent or persistent health care or social services intervention.
- Responding to the inability of older people through isolation or disability to access essential support around welfare benefits, as well as other support mechanisms from within their local community.
- Reducing Delayed Transfer of Care for older people having previously being admitted to hospital via building inter-agency and community-led support capacity.

The project has provided direct, individually tailored support including befriending/companionship, assistance with transport to medical appointments, ordering/collecting/delivery of shopping, prescriptions and essential items, wellbeing checks, liaison work with health and social care services and family members, provision of independent information, advice and assistance, income maximisation, digital device support, assistance with mail/administration tasks and re-engaging with community based wellbeing opportunities.

This provision has not only provided vital practical support to maintain and improve physical and emotional wellbeing, but also reduced loneliness and isolation through increased social contacts. The nature of the tailored face to face support has an immediate and lasting impact on service users as regular interaction and support is integrated into daily routines. Service users have appeared more confident, have increased or more stable social networks and are more aware and confident to make decisions that directly affect their lives. The service continues to play a vital role in prevention and early intervention solutions and through the comprehensive independent information and advice element, we can identify key problems, crisis areas and transition points in people's lives and respond quickly to avoid escalation and reduce the need for more intense services/responses.

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**ACHIEVEMENT AND PERFORMANCE**

**Telephone befriending**

To help alleviate loneliness and isolation and identify if any additional services/support is required, staff and volunteers have provided regular telephone befriending phone calls. During this reporting period, there has been a consistent demand for this service.

**Falls Prevention**

Via our Age Connects Wales partnership, we have once again worked together with Age Cymru and Care and Repair Cymru to deliver a campaign to highlight the need and support for falls prevention work. As well as digital campaigns, case studies and website/social media awareness raising activities, this partnership has worked with professionals who work with older people to help prevent falls and provide appropriate support to those who have suffered a fall.

**Coal Authority**

Following a major flooding incident within the borough which led to multiple homes and streets being evacuated, the creation of a water management system and major restorative operations was required. As part of the local support package, Age Connects NPT created a formal partnership with The Coal Authority to provide a Community Liaison Officer to act as the link between residents, contractors and customer services teams. The aim of this role has been to help residents really understand the programme of work, its impact and the timescales involved. This has been a crucial role in helping to rebuild the community and communicate key messages from both parties, whilst also ensuring the wellbeing of residents was taken into consideration. The partnership and work programme was completed in September 2023.

**Local Energy Action Partnership (LEAP)**

With Age Connects being at the forefront of providing support services to local older people, we have experienced an exponential increase in direct enquiries from older people and referrals from other agencies asking us to provide older people with support upon matters associated with fuel costs, fuel poverty, cost of living crisis and energy efficiency. In response, we have joined LEAP (the Local Energy Advice Partnership) which is a national initiative that facilitates the free provision of energy efficiency measures to households, including:

- Energy Efficiency Advice.
- Energy saving measures and equipment.
- Home insulation.
- Boiler repair and replacement.
- Energy efficient white goods.

As the delivery partner for Neath Port Talbot and Swansea, we can provide access to a wide spectrum of energy efficiency resources to directly combat factors of unaffordable heating that particularly impacts older and more vulnerable people and make referral to additional specific support schemes. Eligible service users receive a home visit from one of our trained staff members who completes a home energy efficiency check and installs a range of energy efficiency measures such as LED light bulbs, draft excluders, radiator panels, door brushes and hot water cylinder jackets etc. Our staff member also assesses and refers to boiler and white goods replacement schemes if eligible and completes a benefit check to establish if service users are claiming and accessing their full benefit entitlement. Full support is provided to complete any relevant application benefit application forms.

**Volunteering Programme**

All of our volunteers are DBS checked, receive induction training, are issued with several training resources to assist with their roles and complete several of our additional online training modules in line with role specific requirements. Our volunteer team work directly with older people, provide administrative support or help with fundraising activities and have collectively committed approximately **8,000 hours of support** enabling both the charity and residents to benefit from their skills, expertise, time and dedication. The equivalent monetary value for this **in-kind volunteer support in excess of £100,000** which has been based on the Office of National Statistics (ONS) hourly rate for full time employees in Wales. We continue to work hard to retain volunteers' skills both for our immediate/ongoing response and moving forward in future projects to maximise resources available and help ensure we can improve the lives of some of the most marginalised in the area.

**REPORT OF THE TRUSTEES  
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**ACHIEVEMENT AND PERFORMANCE**

Our volunteers are highly valued and recognised as an essential part of the organisation and have been given the opportunity to gain new skills and knowledge, build their social networks, give something back to their community and if appropriate, gain an up-to-date reference. Throughout this past year, a range of accredited and non-accredited training has again been offered to both existing and newly recruited volunteers. Training was delivered on topics including but not limited to Welfare Benefits, Nail Cutting, Information and Advice, First Aid, Protection of Vulnerable Adults (POVA), Ageing, Home Fire Safety, Energy Efficiency Measures, Communicating Effectively, Person Centred Care, Assessing Needs, Challenging Behaviour and Confidentiality.

It is only with the support of our volunteers that Age Connects Neath Port Talbot can provide a range of services at such a high quality, and therefore we would like to take this opportunity to formally thank all our volunteers for their input into the organisation.

**Income Generation  
Foot Care Service**

Healthy, comfortable feet are essential, especially for older people and this nail cutting and non-surgical foot care service has proved to be a vital service for hundreds of older people this year. As we age, some people need assistance with cutting their toe/fingernails and arthritic joints, tough overgrown toenails, hard skin, corns and ingrowing toenails can make wearing shoes, balancing and walking comfortably almost impossible. Service users have accessed risk assessed community-based clinics which are held in various accessible venues, including a purposely adapted room at our Head Office in Neath. If service users are unable to access these clinics, they are provided with a home visit appointment, a service that operates across the whole region and is also available in care homes and sheltered/supported accommodation. With permission from hospital staff, the service has also been active within SBUHB Hospital Wards to ensure services users maintain their foot health during lengthy hospital stays.

This convenient and affordable service for older people is well established, growing across the county borough and continues to provide a regular surplus for the charity. To maintain the service at the highest standard, the team receive regular supervision and utilise Podiatry Service best practice guidance to deliver the service. The project continues to be a vital service for older people across the borough and this year has provided **2,355 appointments**.

**Home Fire Safety Checks**

Through our service level agreement with the Mid and West Wales Fire and Rescue Service, we provide free Home Fire Safety Checks to residents who are deemed to be vulnerable and/or at high risk. This service is delivered by a team of experienced volunteers who visit domestic properties to provide home fire safety advice and supply and install a range of equipment (smoke alarm, extension lead, carbon monoxide alarms, stove alarms and fire-retardant clothing/bedding etc.) free of charge. The checks are the cornerstone of the proactive role the Mid and West Wales Fire and Rescue Service is continuing to adopt in its drive to reduce the deaths and injuries that are caused by accidental fires. Our aim is to make this service as accessible as possible and this year, our volunteers have completed **133 Home Fire Safety Checks** and provided free equipment to worth in **excess of £7,500** (please note, this calculation is based on equipment prices from a market leader in the industry).

**FINANCIAL REVIEW**

**Financial position**

During the course of the year, we have continued to maintain a tight fiscal policy, which has enabled us to maintain our reserves as stated below. We have been successful in securing specific funding for project work and the management costs we incorporated into our project budgets have contributed to our overall running costs.

During the financial year the charity reported a surplus of £14,164 (2023: deficit £29,780).

We are pleased to report that 98.1% of expenditure was utilised directly on charitable activities, with the remainder on governance and income generation.

The unrestricted reserves at 31 March 2024 were £202,300 (2023: £193,136) and restricted reserves were £5,556 (2023: £556).

**REPORT OF THE TRUSTEES  
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**FINANCIAL REVIEW**

**Reserves policy**

The board has examined the charity's requirements for reserves in respect of the main risks to the organisation and aims to build up reserves in future years to enable it to continue and expand the services they currently provide. The charity's policy is to maintain designated reserve for;

- (1) The critical cost fund represents six months running costs, estimated staff notice, redundancy costs and lease agreement termination costs.
- (2) The planned budget spend 24/25 represents funds to cover the expected shortfall in income during the year ended 31st March 2025 and allow all services to continue.
- (3) The charity's long-term plan to purchase its own premises or lease larger and more appropriate space is represented by the 'Buildings Fund'.

**FUTURE PLANS**

As the main specialist older persons organisation delivering front line services across the whole borough, there is an opportunity to develop innovative new services to meet the increasing demand for services, particularly following the drastic and ongoing funding cuts across the public and voluntary sector.

**Renewal of Alternative Office**

We have maintained our status as a Department for Work and Pensions (DWP) alternative office and will continue to adhere to all the required policies and procedures. Holding this important status has various benefits including allowing the first date of contact with the Alternative Office to be considered when deciding the start date of entitlement and streamlining the application process. We will continue to promote this service and ensure that those identified as most in need have access to a robust and professional service.

**Foot Care Service**

We plan to further increase efforts to develop this service, regain service users that may have withdrawn from the service for various reasons, continue to identify additional areas to deliver the service and increase the frequency/regularity of existing clinics. We have maintained a positive working relationship with several health services such as hospitals, local resource centres and pharmacies which we will continue to develop. Due to the experience and qualifications of our staff and volunteer team, combined with changes in eligibility criteria for free services and the significant pressure that Swansea Bay University Health Board services, we have benefitted from being one of the referral options for the Podiatry Service. In anticipation of increased demand, we will again be investigating expanding our Foot Care Team.

**Local Energy Action Partnership (LEAP)**

Due to the significant and ongoing demand for this service, combined with the enduring cost of living crisis, we will continue to develop this provision, including increasing staff resources, to ensure increased numbers of older people can benefit from this essential support. The service also acts as a gateway to general support for our service users and due to the specific nature of the service, can help to identify, target and support some of the hardest to reach and vulnerable in the region - something which is vitally important to our organisation as we move forward into increasingly challenging and uncertain times.

**Age Connects Neath Port Talbot - One Stop Shop**

Our town centre premises continue to provide an Age Connects Neath Port Talbot one stop shop for older people. Whilst the COVID19 pandemic resulted in the suspension of hosting like-minded organisations within our premises, we will revisit developing this model further to provide enhanced access and service provision for local older people. With increased focus on regional delivery models, we can offer such organisations the facilities to maintain a local presence and improve access to services.

**Website and social media**

Due to the continued growth and popularity of online services and social media with both individuals and organisations, we will continue to utilise these platforms to promote the organisation and its services, increase internet traffic to our website, raise awareness of issues affecting older people and link up with various organisations within the statutory, private and voluntary sector.

**REPORT OF THE TRUSTEES  
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**Outreach services**

Our Outreach Services were born from extensive research and consultation with local older people and partner organisations. Through previous provision and development activities, we know that there remains a real and ongoing demand for a flexible and evolving community activity/social rehabilitation service across the county borough. Through our Community Outreach Services, we have been able to deliver health and well-being services through utilising community facilities and have focused the engagement of older people in health promotion activities such as exercise classes, walking groups, mindfulness sessions, art and crafts and healthy living talks/demonstrations. We have also delivered our Community Outreach Services within Sheltered Housing Complexes, as we know from previous experience that residents can often become socially isolated, despite living within a supported environment.

Future development of this provision will include:

- Committing resources to the expansion of Community Outreach Hubs and Dementia Care Connects provision, as we know that these activities have a dramatic impact on the physical health and emotional wellbeing of an ageing population, nurture social and economic engagement and help reduce feelings of loneliness and isolation.
- Continue to develop our referral network to ensure that this service has maximum reach to all potential stakeholders, further increasing access, participation and referral statistics.
- Increase efforts to recruit, train and induct more volunteers to provide additional capacity within the service and raise awareness and skills within local communities around what type of support is needed and available for those with or at risk of a dementia diagnosis.
- Further develop the opportunities available within the activity programme and continue to work with service users to provide a wide range of activities and support that help to maintain and improve physical, emotional and social wellbeing, whilst also stimulating creative ideas and skills.
- With the ongoing cost-of-living crisis and change around the welfare benefits system, the service will ensure the provision of independent information and advice to ensure there is clear guidance on any issues that impact their income and benefits.

**Good Neighbour Scheme**

Following the continued demand and identified need for this type of service through our network of community hubs, community presence and the success of existing schemes across the borough, we plan to further develop our 'Good Neighbour Scheme's', helping to maximise reach and support to some of the most isolated, vulnerable and marginalised. Future development of this provision will include:

- Continued development of our referral network to ensure that the project has maximum reach to all potential stakeholders.
- Increased efforts to recruitment, train and induct more volunteers to provide additional capacity within the project and raise awareness and skills within local communities around what type of support is needed and available to some of the most lonely, isolated and marginalised.
- With drastic changes around the welfare benefits system and the introduction of means testing some benefits, particularly going into the winter period, the project will increase the independent information and advice element of the service to ensure that all service users have clear guidance on any issues that impact their income and benefits, particularly around Pension Credit and Winter Fuel Payments.
- Providing and/or facilitating involvement in community-based health and wellbeing opportunities for those that have improved their confidence, self-esteem and wellbeing. This may be particularly relevant for older people who have/are experiencing a period of reablement.
- Given the nature of this service and the 'gateway' properties it has, particularly for home-based service provision, the service brings with it opportunities to scale up and introduce additional support/services to assist in areas within health and social care services that lack resource.

**Independent advocacy**

As an independent organisation with an excellent track record of delivering reliable and responsive independent advocacy services for people aged 50 plus, we will continue to raise awareness of the need for independent advocacy and highlight our skills and experience in relation to delivering and developing a robust service. We will continue to work in partnership with Age Cymru and Age Connects Wales on the HOPE Advocacy Project and remain the host organisation for project staff within the Swansea Bay region. In addition, we will continue to promote and offer 'lower level' advocacy support through our community outreach service and information and advice service.

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FOR THE YEAR ENDED 31 MARCH 2024**

**Social Enterprise**

The increased competition from other third sector organisations and a greater difficulty to secure large grant funding awards, will result in the organisation once again focusing more time, energy and resource to develop new and existing social enterprise activities. We will continue to consult with actual and potential service users and work more closely with other Age Connects Organisations and Age Connects Wales to identify new opportunities to further diversify income. At the time of writing this report, the organisation is continuing to investigate several social enterprise developments. When launched and established, the surpluses from any social enterprise activities will be reinvested into the charity and will be an invaluable source of unrestricted, general funds. These additional funds will allow us to continue to deliver and develop essential services to local older people.

**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.

Age Connects Neath Port Talbot is the operating title of Age Concern Neath Port Talbot.

The charity operates under the former Age Concern Movement's Gold Memorandum and Articles of Association. This sets out the objects and powers of the charitable company.

**Recruitment and appointment of board members**

The directors of the company are also charity trustees for the purposes of charity law, and in the organisation's Memorandum and Articles are known as the Board.

Articles 24 to 29 set out the procedures for recruitment and appointment to the Board. Elections for the Board take place at the Annual General Meeting. Members are elected to serve for a period of three years, after which term they are eligible to seek re-election. We aim to ensure that our Board is both representative of the people and communities with whom we work and has the necessary combined skills and experience to effectively govern the organisation.

While involvement in a wider Executive Committee and/or an Advisory Group (see below) provides useful experience for potential Board members, we do not limit our search to these routes. Our extensive cross-sector networks have proven invaluable for advertising vacancies and reaching potential candidates.

**Organisational structure**

The Board currently employs one core member of staff, a Chief Executive Officer on a permanent contract. Other staff members are employed on fixed term contracts utilising restricted funds for specific work.

The average full-time equivalent number of staff this year was 7. Our 30 active volunteers were supervised and supported by the staff team.

We are most grateful to Neath Port Talbot County Borough Council for contributing towards our core costs.

**Induction and training of new trustees**

It is important to remember that the trustees are volunteers. Age Connects Neath Port Talbot operates a robust volunteer recruitment, screening and induction process, which applies to Board members, as it does to all other volunteers. Our Investing in Volunteers quality mark has previously expired, but we continue to follow its guidance.

This process, which is underpinned by a comprehensive volunteer handbook, includes an informal interview, taking up references, and where policy necessitates, a Disclosure and Barring (DBS) check. Potential candidates for the Board also meet existing Trustee/Directors prior to confirming their interest in the vacancy, and if selected, serve a probationary period as a co-opted member.

As volunteers with extensive legal responsibilities, new Board Members receive additional informal training, based on our Trustee/Director Welcome Pack, which includes various items such as Charity Commission publications, and the Age Connects Neath Port Talbot portfolio of business plans. Group and/or individual training is provided in response to identified needs and an annual away day provides new recruits with the opportunity to learn more about our organisation's policy and strategy, as does attendance at special events, such as project launches.

**Executive Committee**

The Executive Committee is comprised of the Board members plus co-opted representatives with additional expertise. (Co-opted members have no voting rights).

**AGE CONCERN NEATH PORT TALBOT (REGISTERED NUMBER: 04193486)  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**REPORT OF THE TRUSTEES  
FOR THE YEAR ENDED 31 MARCH 2024**

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

**Risk management**

We hold both Professional Indemnity and Public Liability Insurance.

Policies and procedures are reviewed annually, and where necessary, introduced to minimise identified risk factors.

We hold an annual away day where staff and board members work together on the organisation's strategic development and any associated business plans. At this meeting we carry out strategic analysis which can highlight opportunities, potential risks and actions needed to minimise those risks.

With demand for services increasing, revenue costs rising and income generation becoming ever more competitive, we thank our funders and benefactors for their continued support.

Our thanks to our independent examiner, Michael Jones and his colleagues at Bevan Buckland LLP Chartered Accountants for their professional support and guidance throughout the year.

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

Approved by order of the board of trustees on 26 December 2024 and signed on its behalf by:

L Veale - Trustee

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF  
AGE CONCERN NEATH PORT TALBOT**

**Independent examiner's report to the trustees of Age Concern Neath Port Talbot ('the Company')**

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 March 2024.

**Responsibilities and basis of report**

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

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

**Independent examiner's statement**

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

1. accounting records were not kept in respect of the Company as required by Section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of Section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities (applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)).

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

Michael Jones

Bevan Buckland LLP  
Ground Floor Cardigan House  
Castle Court  
Swansea Enterprise Park  
Swansea  
SA7 9LA

30 December 2024

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**STATEMENT OF FINANCIAL ACTIVITIES  
(INCORPORATING AN INCOME AND EXPENDITURE ACCOUNT)  
FOR THE YEAR ENDED 31 MARCH 2024**

	Notes	Unrestricted funds £	Restricted funds £	2024 Total funds £	2023 Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>					
Donations and legacies	3	4,332	-	4,332	2,931
<b>Charitable activities</b>	5				
Promote relief for elderly people		108,023	134,947	242,970	200,873
Investment income	4	<u>1,536</u>	<u>-</u>	<u>1,536</u>	<u>297</u>
<b>Total</b>		<u>113,891</u>	<u>134,947</u>	<u>248,838</u>	<u>204,101</u>
<b>EXPENDITURE ON</b>					
Raising funds		4,372	-	4,372	4,423
<b>Charitable activities</b>	6				
Promote relief for elderly people		<u>100,355</u>	<u>129,947</u>	<u>230,302</u>	<u>229,458</u>
<b>Total</b>		<u>104,727</u>	<u>129,947</u>	<u>234,674</u>	<u>233,881</u>
<b>NET INCOME/(EXPENDITURE)</b>		9,164	5,000	14,164	(29,780)
<b>RECONCILIATION OF FUNDS</b>					
Total funds brought forward		193,136	556	193,692	223,472
<b>TOTAL FUNDS CARRIED FORWARD</b>		<u>202,300</u>	<u>5,556</u>	<u>207,856</u>	<u>193,692</u>

**CONTINUING OPERATIONS**

All income and expenditure has arisen from continuing activities.

The notes form part of these financial statements

**AGE CONCERN NEATH PORT TALBOT (REGISTERED NUMBER: 04193486)**  
**TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**BALANCE SHEET**  
**31 MARCH 2024**

	Notes	Unrestricted funds £	Restricted funds £	2024 Total funds £	2023 Total funds £
<b>FIXED ASSETS</b>					
Tangible assets	11	2,466	-	2,466	4,080
<b>CURRENT ASSETS</b>					
Debtors	12	2,210	-	2,210	34,680
Cash at bank		202,207	5,556	207,763	159,005
		<u>204,417</u>	<u>5,556</u>	<u>209,973</u>	<u>193,685</u>
<b>CREDITORS</b>					
Amounts falling due within one year	13	(4,583)	-	(4,583)	(4,073)
<b>NET CURRENT ASSETS</b>		<u>199,834</u>	<u>5,556</u>	<u>205,390</u>	<u>189,612</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		202,300	5,556	207,856	193,692
<b>NET ASSETS</b>		<u>202,300</u>	<u>5,556</u>	<u>207,856</u>	<u>193,692</u>
<b>FUNDS</b>	15				
Unrestricted funds				202,300	193,136
Restricted funds				5,556	556
<b>TOTAL FUNDS</b>				<u>207,856</u>	<u>193,692</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 March 2024.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 March 2024 in accordance with Section 476 of the Companies Act 2006.

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 prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

The financial statements were approved by the Board of Trustees and authorised for issue on 26 December 2024 and were signed on its behalf by:

L Veale - Trustee

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MARCH 2024**

**1. STATUTORY INFORMATION**

Age Concern Neath Port Talbot is a charitable company, limited by guarantee, registered in England and Wales. The charity's registered number and registered office address can be found on the Reference and Administrative Details page.

The presentation currency of the financial statements is the Pound Sterling (£).

**2. 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.

The trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern.

**Financial reporting standard 102 - reduced disclosure exemptions**

The charitable company has taken advantage of the following disclosure exemption in preparing these financial statements, as permitted by FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland':

- the requirements of Section 7 Statement of Cash Flows.

**Income**

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

Government and other grants in relation to tangible fixed asset are credited to profit and loss account over the useful lives of the related assets, whereas those in relation to expenditure are credited when the expenditure is charged to profit and loss.

Donations, are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those conditions is wholly within the control of the charity and it is probable that those conditions will be fulfilled in the reporting period.

Legacy gifts are recognised on a case by case basis following the granting of probate when the administrator/executor for the estate has communicated in writing both the amount and settlement date. In the event that the gift is in the form of an asset other than cash or a financial asset traded on a recognised stock exchange, recognition is subject to the value of the gift being reliably measurable with a degree of reasonable accuracy and the title to the asset having been transferred to the charity.

**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.

The cost of generating funds comprises those costs associated with attracting grant income. Charitable expenditure comprises those costs incurred by the Charity in the delivery of its activities, both costs directly attributable and indirect support costs. Governance costs include those costs associated with meeting constitutional and statutory requirements of the Charity.

The Charity initially identifies the costs of its support functions. Support costs include back office costs, finance, personnel, payroll and governance costs which support the charities programmes and activities.

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**2. ACCOUNTING POLICIES - continued**

**Expenditure**

All costs allocated between expenditure categories are on a basis designed to reflect their resource usage. For some costs this means direct allocation to activities, other costs are apportioned, e.g. by staff time spent on the activity, or another equitable usage measure.

**Tangible fixed assets**

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

Fixtures and fittings	- 10% on cost
Computer equipment	- 33% on cost

The charities policy is to capitalise items purchased costing over £500.

**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.

**Defined contribution pension scheme**

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.

**Short-Term Employee Benefits**

Short-term employee benefits that are expected to be settled wholly before twelve months after the end of the annual reporting period in which the employees render the related service:

- (a) wages, salaries and social security contributions;
- (b) time in lieu owed to the employee.

**Debtors**

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

**Cash at bank and in hand**

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

**Creditors and provisions**

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

**Financial instruments**

The company has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the company's balance sheet when the company becomes party to the contractual provisions of the instrument.

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**2. ACCOUNTING POLICIES - continued**

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

**Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

**Derecognition of financial assets**

Financial assets are derecognised only when the contractual rights to the cash flows from the asset expire or are settled, or when the company transfers the financial asset and substantially all the risks and rewards of ownership to another entity, or if some significant risks and rewards of ownership are retained but control of the asset has transferred to another party that is able to sell the asset in its entirety to an unrelated third party.

**Classification of financial liabilities**

Financial liabilities and equity instruments are classified according to the substance of the contractual arrangements entered into. An equity instrument is any contract that evidences a residual interest in the assets of the company after deducting all of its liabilities.

**Basic financial liabilities**

Basic financial liabilities, including creditors and bank loans, are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of business from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

**Derecognition of financial liabilities**

Financial liabilities are derecognised when the company's contractual obligations expire or are discharged or cancelled.

**3. DONATIONS AND LEGACIES**

	2024	2023
	£	£
Donations	<u>4,332</u>	<u>2,931</u>

**4. INVESTMENT INCOME**

	2024	2023
	£	£
Interest received	<u>1,536</u>	<u>297</u>

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**5. INCOME FROM CHARITABLE ACTIVITIES**

		2024	2023
	Activity	£	£
Nail cutting services	Promote relief for elderly people	34,172	32,804
Outreach contributions	Promote relief for elderly people	4,981	2,645
Energy survey income	Promote relief for elderly people	34,150	8,000
Grants	Promote relief for elderly people	<u>169,667</u>	<u>157,424</u>
		<u>242,970</u>	<u>200,873</u>

Grants received, included in the above, are as follows:

	2024	2023
	£	£
NPTCBC- SLA Core	29,920	28,226
The Tudor Trust	-	15,000
Age Cymru HOPE Project hosting allowance	4,800	6,000
National Coal Authority	-	6,237
NPTCBC Outreach Grant	-	10,000
RIF Dementia Connects	56,120	40,613
RIF Prevention Grant	54,091	40,848
Community Renewal Fund	-	10,500
National Grid Community Matters	9,400	-
NPTCVS Cost of Living Grant	5,336	-
NPTCBC Food Voucher Grant	5,000	-
Community Foundation	<u>5,000</u>	<u>-</u>
	<u>169,667</u>	<u>157,424</u>

**6. CHARITABLE ACTIVITIES COSTS**

	Direct Costs £	Support costs £	Totals £
Promote relief for elderly people	<u>224,860</u>	<u>5,442</u>	<u>230,302</u>

**7. NET INCOME/(EXPENDITURE)**

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

	2024	2023
	£	£
Depreciation - owned assets	<u>1,614</u>	<u>3,118</u>

**8. TRUSTEES' REMUNERATION AND BENEFITS**

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

**Trustees' expenses**

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

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**9. STAFF COSTS**

	2024	2023
	£	£
Wages and salaries	184,731	178,707
	<u>184,731</u>	<u>178,707</u>

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

	2024	2023
Community	<u>7</u>	<u>8</u>

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

The total remuneration paid to key management during the year was £52,406 (2023 - £50,645).

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

	Unrestricted funds £	Restricted funds £	Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>			
Donations and legacies	2,931	-	2,931
<b>Charitable activities</b>			
Promote relief for elderly people	77,675	123,198	200,873
Investment income	297	-	297
<b>Total</b>	<u>80,903</u>	<u>123,198</u>	<u>204,101</u>
<b>EXPENDITURE ON</b>			
Raising funds	4,423	-	4,423
<b>Charitable activities</b>			
Promote relief for elderly people	88,954	140,504	229,458
<b>Total</b>	<u>93,377</u>	<u>140,504</u>	<u>233,881</u>
<b>NET INCOME/(EXPENDITURE)</b>	(12,474)	(17,306)	(29,780)
<b>Transfers between funds</b>	1,822	(1,822)	-
<b>Net movement in funds</b>	<u>(10,652)</u>	<u>(19,128)</u>	<u>(29,780)</u>
<b>RECONCILIATION OF FUNDS</b>			
Total funds brought forward	203,788	19,684	223,472
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u>193,136</u>	<u>556</u>	<u>193,692</u>

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**11. TANGIBLE FIXED ASSETS**

	Fixtures and fittings £	Computer equipment £	Totals £
<b>COST</b>			
At 1 April 2023 and 31 March 2024	<u>1,228</u>	<u>15,448</u>	<u>16,676</u>
<b>DEPRECIATION</b>			
At 1 April 2023	1,148	11,448	12,596
Charge for year	80	1,534	1,614
At 31 March 2024	<u>1,228</u>	<u>12,982</u>	<u>14,210</u>
<b>NET BOOK VALUE</b>			
At 31 March 2024	<u>-</u>	<u>2,466</u>	<u>2,466</u>
At 31 March 2023	<u>80</u>	<u>4,000</u>	<u>4,080</u>

**12. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	2024 £	2023 £
Prepayments and accrued income	<u>2,210</u>	<u>34,680</u>

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

	2024 £	2023 £
Other creditors	32	32
Accrued expenses	<u>4,551</u>	<u>4,041</u>
	<u>4,583</u>	<u>4,073</u>

**14. LEASING AGREEMENTS**

Minimum lease payments under non-cancellable operating leases fall due as follows:

	2024 £	2023 £
Within one year	6,000	6,000
Between one and five years	<u>9,500</u>	<u>15,500</u>
	<u>15,500</u>	<u>21,500</u>

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**15. MOVEMENT IN FUNDS**

	At 1.4.23 £	Net movement in funds £	At 31.3.24 £
<b>Unrestricted funds</b>			
General fund	9,056	10,778	19,834
Capital funds	4,080	(1,614)	2,466
Designated funds - Critical costs	110,000	-	110,000
Planned budget spend	30,000	-	30,000
Building fund	40,000	-	40,000
	<u>193,136</u>	<u>9,164</u>	<u>202,300</u>
<b>Restricted funds</b>			
Western Power	514	-	514
RIF Prevention	42	-	42
Community Foundation - Our Communities Together	-	5,000	5,000
	<u>556</u>	<u>5,000</u>	<u>5,556</u>
<b>TOTAL FUNDS</b>	<u>193,692</u>	<u>14,164</u>	<u>207,856</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	113,891	(103,113)	10,778
Capital funds	-	(1,614)	(1,614)
	<u>113,891</u>	<u>(104,727)</u>	<u>9,164</u>
<b>Restricted funds</b>			
RIF Prevention	54,091	(54,091)	-
RIF Dementia Connects	56,120	(56,120)	-
Nat Grid Community Matters Fuel Poverty	9,400	(9,400)	-
NPTCBC Food Voucher Grant	5,000	(5,000)	-
NPTCVS Cost of Living Grant	5,336	(5,336)	-
Community Foundation - Our Communities Together	5,000	-	5,000
	<u>134,947</u>	<u>(129,947)</u>	<u>5,000</u>
<b>TOTAL FUNDS</b>	<u>248,838</u>	<u>(234,674)</u>	<u>14,164</u>

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**15. MOVEMENT IN FUNDS - continued**

**Comparatives for movement in funds**

	At 1.4.22 £	Net movement in funds £	Transfers between funds £	At 31.3.23 £
<b>Unrestricted funds</b>				
General fund	10,217	(9,356)	8,195	9,056
Capital funds	5,703	(3,118)	1,495	4,080
Designated funds - Critical costs	120,000	-	(10,000)	110,000
Mid West Wales Fire Service Funding	2,868	-	(2,868)	-
Planned budget spend	25,000	-	5,000	30,000
Building fund	40,000	-	-	40,000
	<u>203,788</u>	<u>(12,474)</u>	<u>1,822</u>	<u>193,136</u>
<b>Restricted funds</b>				
Western Power	514	-	-	514
Tudor Trust	19,170	(19,137)	(33)	-
NPTCBC Outreach Grant	-	294	(294)	-
RIF Prevention	-	1,537	(1,495)	42
	<u>19,684</u>	<u>(17,306)</u>	<u>(1,822)</u>	<u>556</u>
<b>TOTAL FUNDS</b>	<u>223,472</u>	<u>(29,780)</u>	<u>-</u>	<u>193,692</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	80,903	(90,259)	(9,356)
Capital funds	-	(3,118)	(3,118)
	<u>80,903</u>	<u>(93,377)</u>	<u>(12,474)</u>
<b>Restricted funds</b>			
Tudor Trust	15,000	(34,137)	(19,137)
National Coal Authority	6,237	(6,237)	-
NPTCBC Outreach Grant	10,000	(9,706)	294
RIF Prevention	40,848	(39,311)	1,537
RIF Dementia Connects	40,613	(40,613)	-
Community Renewal Fund	10,500	(10,500)	-
	<u>123,198</u>	<u>(140,504)</u>	<u>(17,306)</u>
<b>TOTAL FUNDS</b>	<u>204,101</u>	<u>(233,881)</u>	<u>(29,780)</u>

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**15. MOVEMENT IN FUNDS - continued**

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

	At 1.4.22 £	Net movement in funds £	Transfers between funds £	At 31.3.24 £
<b>Unrestricted funds</b>				
General fund	10,217	1,422	8,195	19,834
Capital funds	5,703	(4,732)	1,495	2,466
Designated funds - Critical costs	120,000	-	(10,000)	110,000
Mid West Wales Fire Service Funding	2,868	-	(2,868)	-
Planned budget spend	25,000	-	5,000	30,000
Building fund	40,000	-	-	40,000
	<u>203,788</u>	<u>(3,310)</u>	<u>1,822</u>	<u>202,300</u>
<b>Restricted funds</b>				
Western Power	514	-	-	514
Tudor Trust	19,170	(19,137)	(33)	-
NPTCBC Outreach Grant	-	294	(294)	-
RIF Prevention	-	1,537	(1,495)	42
Community Foundation - Our Communities	-	5,000	-	5,000
Together	<u>-</u>	<u>5,000</u>	<u>-</u>	<u>5,000</u>
	<u>19,684</u>	<u>(12,306)</u>	<u>(1,822)</u>	<u>5,556</u>
<b>TOTAL FUNDS</b>	<u>223,472</u>	<u>(15,616)</u>	<u>-</u>	<u>207,856</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 £
<b>Unrestricted funds</b>			
General fund	194,794	(193,372)	1,422
Capital funds	-	(4,732)	(4,732)
	<u>194,794</u>	<u>(198,104)</u>	<u>(3,310)</u>
<b>Restricted funds</b>			
Tudor Trust	15,000	(34,137)	(19,137)
National Coal Authority	6,237	(6,237)	-
NPTCBC Outreach Grant	10,000	(9,706)	294
RIF Prevention	94,939	(93,402)	1,537
RIF Dementia Connects	96,733	(96,733)	-
Community Renewal Fund	10,500	(10,500)	-
Nat Grid Community Matters Fuel Poverty	9,400	(9,400)	-
NPTCBC Food Voucher Grant	5,000	(5,000)	-
NPTCVS Cost of Living Grant	5,336	(5,336)	-
Community Foundation - Our Communities	-	-	-
Together	<u>5,000</u>	<u>-</u>	<u>5,000</u>
	<u>258,145</u>	<u>(270,451)</u>	<u>(12,306)</u>
<b>TOTAL FUNDS</b>	<u>452,939</u>	<u>(468,555)</u>	<u>(15,616)</u>

**AGE CONCERN NEATH PORT TALBOT  
TRADING AS AGE CONNECTS NEATH PORT TALBOT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**15. MOVEMENT IN FUNDS - continued**

**Purpose of Designated funds**

Critical cost fund - represents six months running costs, estimated staff notice, redundancy costs and lease agreement termination costs.

Planned budget spend - represents funds to cover the expected shortfall in income during the year ended 31st March 2025 and allow all services to continue.

Buildings fund - represents funds allocated to the charity's long-term plan to purchase its own premises or lease larger and more appropriate space based on potential community development plans.

**Purpose of Restricted Funds**

NPT Food Poverty Grant - Provision of essential food items for those most in need.

Tudor Trust - Contribution to COVID19 Response Service (following remodelling of original Social Enterprise project due to COVID19 restrictions in place).

National Coal Authority - A Community Liaison Project to support local residents following the major flooding that occurred in Skewen, Neath Port Talbot.

NPTCBC Outreach Grant - To contribute to Age Connects NPT's Community-based Outreach Hub Programme.

RIF Dementia Connects - To provide a range of community-based support and preventative activities that focus on improving physical and emotional health and wellbeing, whilst also supporting those in the early stages of a dementia diagnosis.

RIF Prevention Grant - The project provides direct and individually tailored practical and befriending type support to help maintain independence, reduce loneliness and improving wellbeing.

NPTCVS Cost of Living Grant - This grant contributes to core costs for providing an information, advice and assistance service associated with accessing welfare benefits, maximising income and alleviating fuel poverty.

Community Foundation Wales - Our Communities Together - This grant contributes to core costs for providing an information, advice and assistance service associated with accessing welfare benefits, maximising income and alleviating fuel poverty.

Community Matters Neath Port Talbot - A Warmer Homes for Older people in Neath Port Talbot project

**16. RELATED PARTY DISCLOSURES**

There were no related party transactions for the year ended 31 March 2024.

This document was delivered using electronic communications and authenticated in accordance with the registrar's rules relating to electronic form, authentication and manner of delivery under section 1072 of the Companies Act 2006.