AGE CONCERN MOLE VALLEY

England & Wales · Charity number 1111678

Details

Other names	AGE CONCERN MOLE VALLEY NORTH
Status	Registered
Legal form	Charitable company
Company number	05409543
Registered	2005-10-13
Register	View on the Charity Commission register

Contact

Address	The Point Mayflower Lyons Court Dorking Surrey RH41AB
Phone	01306899104
Email	info@ageconcernmolevalley.org.uk
Website	www.ageconcernmolevalley.org.uk

Activities

Objects: TO PROMOTE THE RELIEF OF ELDERLY PEOPLE IN ANY MATTER WHICH NOW OR HEREAFTER MAY BE DEEMED BY LAW TO BE CHARITABLE IN THE DISTRICT OF MOLE VALLEY.

Activities: Age Concern Mole Valley's vision and mission are 'Improving the lives of older people' and 'Making later life a fulfilling and enjoyable experience'. The charity operates within the Mole Valley District of Surrey.

Classification

- **How:** Provides Human Resources, Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, Education/training, The Prevention Or Relief Of Poverty, Economic/community Development/employment
- **Who:** Elderly/old People

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Geography

- **Area of benefit:** IN AND AROUND THE TOWNS OF LEATHERHEAD, ASHTEAD, FETCHAM AND BOOKHAM.
- Surrey

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£94,982	£85,565	-	-
2024-03-31	£81,482	£88,967	-	-
2023-03-31	£85,968	£88,018	-	-
2022-03-31	£76,150	£86,279	-	-
2021-03-31	£116,468	£83,982	-	-

Trustees

Name	Role	Appointed
SALLY ANN DUBERY	Chair	2017-01-10
ELAINE ANITA MACHIN		2014-10-01
Linda Ann Bellairs		2025-10-28

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AGE CONCERN MOLE VALLEY

England & Wales - Charity number 1111678

Accounts

AGE Concern Mole Valley

Improving the lives of older people

Making later life a fulfilling and enjoyable experience

ANNUAL REPORT

2024-2025

Registered Charity No 1111678
Registered Company No 5409543

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LEGAL & ADMINISTRATION

Registered Charity Number: 1111678
(England and Wales)

Registered Company Number: 5409543
(England and Wales)

Registered Address
The Point, Mayflower Centre, Lyons Court, Dorking, Surrey RH4 1AB

Executive Committee

Chair	Sally Dubery
Trustee	Elaine Machin
Trustee	Dennis Wickham

All members of the Executive Committee are Trustees and Volunteers, and we thank you for your support.

Staff

Chief Executive Officer	Sonia Hubbard
Administrator	June Mills
Volunteer Coordinator	Radhika Lakshman (Resigned June 2024)
Volunteer Coordinator	Diana Webb (Appointed June 2024)
Befriending Service Coordinator	Zoe Stockwell

Bankers
H S B C, 18 North Street, Leatherhead, Surrey KT22 7AR

Independent Examiner
Andrew Wheeler, Taxsense Accountants, 203 West Street, Fareham, Hants PO16 0EN

REPORT OF THE TRUSTEES FOR THE 12 MONTHS TO 31 MARCH 2025

The Trustees present their report with the financial statements of the charity for the year ended 31 March 2025.

The Trustees have adopted the provisions of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in January 2015.

Structure, Governance and Management

The company is registered as a charitable company limited by guarantee and was set up by Memorandum and Articles of Association. Age Concern Mole Valley is run by an Executive Committee of Trustees. The Committee meets every 2 months.

The charity has a strategic business plan for 2016-26 in place, which underpins the direction taken. However, the vision and mission of the charity and taking into account the many challenges and opportunities, means the charity also needs to be flexible and ready to respond to environmental changes.

Vision and Mission

The vision of Age Concern Mole Valley is all encompassing and clear, 'Improving the lives of older people' and the mission is 'Making later life a fulfilling and enjoyable experience'. These both underpin all that the charity aims to accomplish in the future.

Age Concern Mole Valley will continue to support older people over 50 but will focus service delivery on people who have reached the statutory pension age and above.

Values and Strategic Aims

The key strategic aims of focus that underpin the charity's direction are as follows:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

Each of these key aims has underlying objectives and outcomes, so that Age Concern Mole Valley can focus on achieving its vision of 'improving the lives of older people' and its mission of 'Making later life a fulfilling and enjoyable experience'.

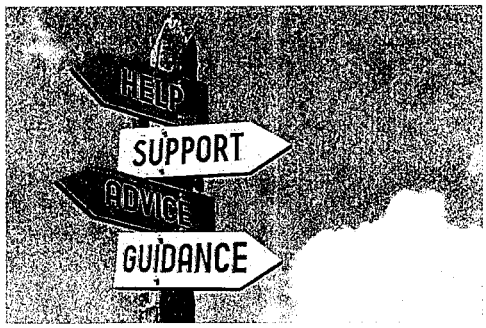
Activities, Achievements and Performance – 2024 to 2025

In this financial year Age Concern Mole Valley has supported 1500 older people with over 5000 activities and continued to develop core projects, such as, the Home Visiting and Befriending Service, the Information & Signposting/Advice Service, and our IT/Digital Sessions in Dorking. Here are some of the key activities and achievements in this financial year.

Age Concern Mole Valley has provided consistent office opening hours in Dorking, four days a week, Monday, Tuesday, Thursday, 09.00 am-1.00 pm, and Friday 09.00 am-12.00 pm, where we provide an all-encompassing Information & Signposting/Advice Service, staffed by June Mills our Administrator.

The charity has continued to be very active throughout the year. We continued to provide over this period the **Age Concern Mole Valley 'Local Community Support Services'**, which encompasses, Home Visiting, Information & Signposting/Advice, Befriending, Social Events, IT/Digital Sessions and support with completing Attendance Allowance/Blue Badge Forms.

The Information and Signposting/Advice Service, 'Pointing you in the Right Direction' has continued to develop extensively over this period, with June Mills our Administrator, adding new and updating records on a regular basis. We have also had the valuable support of our Administrative Volunteer with updating this service over this period. We know a lot of the local groups and contact them as ongoing objective, over this last year we have updated over 330 organisation's data, whereas last year it was 150. The increase has been with the support of our volunteer who has made a huge difference. We now have over 700 organisations on the database to support our service delivery across Mole Valley.



The Age Concern Mole Valley Information & Signposting/ Advice Service is there to assist the public and it also aims to support older people to live at home, independently for as long as possible, through effective signposting to a range of services and support. Here is some feedback from users of the service:

> *"Thank you so much for all of this information. It has made me feel more positive about supporting my mum and taken a big weight off my mind. I really do appreciate it."*
>
> *"Thank you so much for your emailed information - you have restored my faith in human nature!"*

In previous years, e.g., 2023/24 we had over 700 general enquiries, whereas in 2024/25 we have had over 820. This year we have added over 30 new organisations and updated over 330 organisations and the service has noted over **1180 activities, including over 820 individual enquiries,** most of which will often be signposting to more than one service, as we like to give people choice. The development and updating of this invaluable resource is always an ongoing action. We have also added more new referral agencies/professionals, making a total of over 299 referral agencies and professionals that signpost older people into our services for support. This year, the Information & Signposting/Advice service has continued to develop an additional

strand, because of a demand/need for Attendance Allowance/Blue Badge form completion support in the home, which was lacking in Mole Valley. Many of the older people we support are unable to leave their home to get into organisations that can provide support, e.g., Citizens Advice. With the support of our valuable volunteer, we have helped over 50 people and have been successful in bringing £100,000 per annum into Mole Valley.

> *"The attendance allowance will allow me to deal with small but very irritating minor ailments that the surgery no longer receive funds for, plus adding a little more heating and maybe getting a taxi for some hospital appointments, plus money towards costs for household help I currently need. I am extremely grateful for your help in achieving this."*

Home Visiting has continued throughout the year with face-to-face client meetings by Zoe Stockwell, our Befriending Service Coordinator. Our work aims to support older people to live independently for as long as possible, through effective Information & Signposting. The outcome of reduced loneliness and isolation does improve a person's health and wellbeing, a healthier older person can then live safely at home with independence. When the client is ready, we then move onto the Befriending service and make a match with a volunteer. This process is important for both people, especially around finding the right match, it requires listening skills and a great deal of perception, so that the service works for both parties, and we achieve our outcomes of reduced loneliness and isolation.

Zoe has continued to support our elderly clients with additional home visits to revisit their needs over time and to see if any additional information and signposting would enhance their quality of life. She has also increased communication with the next of kin, of our clients where they are available. June, our Administrator has completed many 'welfare calls' to clients waiting for the right Volunteer Befriender match, just so that they know we are thinking of them and to check on their needs in the interim period.

The **Befriending Service** continues to be a vital contribution to reducing loneliness and isolation and increasing community cohesion with local communities coming together, plus improving the health and wellbeing of the older person and in some cases the volunteer. The aim is to enable the older person to regain social and interpersonal skills which may have become less due to the loss of a loved one, friends, or a close relative moving out of the area.

Over this period, the Volunteer Coordinator, Radhika Lakshman left for a new career in the NHS in June 2024.

Our new Volunteer Coordinator, Diana Webb was appointed in June 2024. We had a Volunteers' week party in June, which was a great opportunity for her to meet for the first time, many of our volunteers.

We would not have been able to assist our clients without our dedicated staff and volunteers.

Befriending Service Feedback/Impact Survey - we have introduced our own impact survey with some of the questions based on the UCLA 3-item loneliness scale, which asks people indirectly about emotions associated with loneliness and isolation. When a new older person joins the Befriending Service, we use the survey to assess specific areas and then we revisit these areas after 6 months to assess the difference the service has made to that person, after a Volunteer Befriender has started to visit. Here are some of the questions (4 out of 8) and our findings in 2024-25, where we asked new Befriending Service clients:

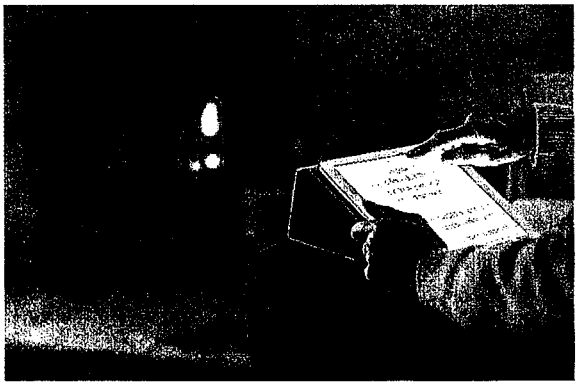
Questions asked to clients	Prior to Volunteer visits	After 6 months of Volunteer visits
Do you often feel isolated from others?	73% of people said often	80% of people said hardly ever/never
How often do you feel lonely	93% of people said often	86% of people said hardly ever
Are you able to talk to people and tell them how you feel?	53% said sometimes	93% said often or always
Do you feel part of and connected to your local neighbourhood?	60% hardly ever/never	87% often/some of the time

Here are some examples from both the client and the volunteer of how this vital service is 'improving the lives of older people':

> *"Age Concern has been very important in mum's life (and mine) not least because of the support from the team but because you matched her so well with her* [volunteer]. *They became great friends and mum so enjoyed her visits and latterly with her little boy, they adored each other!"*
>
> *"I wish to take this opportunity to thank you for all the support and assistance during my time as an Age Concern volunteer. Kind Regards"*
>
> *From (Volunteer) ref his client's feedback: "Thank you so much for coming to see me each week. It always brightens my day and I enjoy putting the world to rights with you and hearing your stories about different things especially wildlife".*
>
> *"I spoke to Doris today and she is absolutely delighted with her new befriender. She said that they have a really good laugh as well as putting the world to rights. They have the same interests in music and films so end up talking for hours."*

Over this time period we had 10 new Volunteer Befrienders/Telephone Befrienders, making a total of 58, matched or waiting for the right match. These volunteers provide an invaluable service to lonely and isolated older people. This is highly appreciated by Age Concern Mole Valley and the person they are visiting.

Information Technology (IT)/Digital Sessions – these sessions are for people over 50 years old and were in operation in Dorking. Through this IT/Digital support we have increased family/friend network development by enabling the use of applications such as, Zoom etc., again with reduced loneliness and isolation. In terms of face-to-face IT/Digital sessions - we held 7 courses over this period, with each course running for 6 weeks and in total we have held over 140 'learner' sessions. At the start of each set of sessions we ask the 'learner' to rate themselves on a scale of 1-10 on their learning objectives and the key areas of development we offer.



Over 2024, we had 40 'learners', those that responded after the 6 sessions, saw an improvement of over 75% in their key learning objective, e.g., skills/knowledge of IT and their gadget. In relation to keeping in touch via Zoom, email, texting, etc., 70% showed an improvement of being able to contact friends and family. Here is some feedback from the 'learners' in 2024 of how these sessions have 'improved their lives'.

"I'm now able to send info/pictures to friends and family when I'm away. It's great fun, laugh a minute'

"I can write e-mails to all my friends, search for information on the Internet."

"I have got excellent help & training after being so frightened of my device. Plan to use it much more in future."

"I'd definitely recommend the classes to older people who might be a bit nervous around new technology. With lots of things being online only nowadays, it offers a whole new lease of life, and you'll never look back."

We have had '5 active volunteers', which support these sessions on a regular basis and without their dedication we would not be able to support these 'learner sessions'. We would like to thank them all for their ongoing commitment to Age Concern Mole Valley, for their never-ending patience and for sharing their knowledge.

Volunteers' Week, over this period we have had a total of 65 volunteers, and we were able to hold two face-to-face celebratory events in Dorking. At these events we were able to thank our wonderful volunteers in person for their commitment to Age Concern Mole Valley and the support of our Befriending Service clients.

We have continued to recruit new volunteers for the befriending service. We need more and will continue to look to the local community for volunteers to support in delivering our services.

We have had 17 Volunteer/Client matches, so in total we had 58 Volunteer Befrienders over this period. We had 5 active volunteers that helped deliver our Information Technology related learning support. We have had 2 volunteers that support Administration and the AA/BB form completion support. Age Concern Mole Valley is extremely grateful for the unstinting efforts of all its volunteers who are involved in service provision, and they are highly valued for their support. Without our volunteers we would not be able to achieve our aims and objectives and 'Improve the lives of older people' in Mole Valley.

Fundraising and Grant Applications:

In 2024/25 one of the key areas of focus by the CEO was to secure funding contributions to support the charity and we want to give thanks for that invaluable support, as follows:

Anton Jurgens
Charitable Trust

The Anton Jurgens Charitable Trust awarded a grant of £5,000, which went towards the Age Concern Mole Valley Local Community Support Services, many thanks for your contribution and support.

THE ALBERT HUNT TRUST

The Albert Hunt Trust – awarded a grant of £5,000 towards the Age Concern Mole Valley Local Community Support Services and it was paid in March 2025 for the April 2025-26 financial year. We thank the Trust for this support towards next year's fundraising.

THE ALLEN LANE FOUNDATION

The Allen Lane Foundation – awarded a grant of £3,500 for core costs and it was paid in March 2025 for the April 2025-26 financial year. We thank the foundation for this grant and for giving Age Concern Mole Valley a grant spread over 2 years.

Central Surrey Voluntary Action
Supporting the voluntary sector in Elmbridge, Epsom & Ewell and Mole Valley

This CSVA SPARKS fund £1,000 grant went towards the Age Concern Mole Valley Local Community Support Services, thank you for the support.

Charles Hayward Foundation

The Charles Hayward Foundation awarded a grant of £4,000 towards the Age Concern Mole Valley Local Community Support Services. We thank the Foundation for this support.

COMMUNITY FUND
The National Lottery Community Fund
25 YEARS OF THE NATIONAL LOTTERY

National Lottery Community Fund - in 2021 we received the great news of 3 years' funding. The last £15,000 grant was restricted funds in this financial year, and the reference is "the National Lottery Community Fund" and the programme name is "RC London and Southeast Region". We thank the Community Fund for believing in all our work and supporting Age Concern Mole Valley for 3 years.

In March 2025 we were successful with an 'Awards for All' grant of £20,000 for the April 2025-26 financial year. We thank the Community fund for a strong foundation for the forth-coming year of fundraising.

Funded by

Community Foundation for Surrey

Community Foundation for Surrey – we thank the CFS for their ongoing support and the hard work, they do on behalf of the voluntary and community sector in Surrey. We had a £10,000 restricted grant, which went towards the charity's core costs, specifically staff salaries.

We also applied to the Foundation for crisis funding during a difficult period in October 2024. We were waiting for various funding to come through and it did come through but not until November onwards, so there was a gap, therefore without the crisis funding, we really would not have been able to continue, as the timing was very close to call. **A Special thank you to the Community Foundation for Surrey for this funding support.**

Garfield Weston FOUNDATION

Garfield Weston Foundation – this £10,000 grant went towards all the charity's running costs and services, particularly our 'Local Community Support Services'. The Garfield Weston Foundation supports small community groups, to large national institutions. The Foundation's aim is to support organisations that have effective solutions to helping those most in need. Thank you for your contribution and we value the continuing support.

SHANLY FOUNDATION

Shanly Foundation - this £3,000 grant went towards the Age Concern Mole Valley Local Community Support Services, many thanks for your contribution and ongoing support.

SURREY

Surrey County Council Accelerator Reform Fund – this ARF £6,000 grant went towards the charity's, running costs, particularly around the Age Concern Mole Valley Local Community Support Services, many thanks for your contribution and support.

We have remained in close contact with local organisations, and we have a strong supportive relationship with Age Concern Epsom & Ewell, Age Concern Banstead and Age Concern Merstham, Redhill & Reigate. We also retain close relations with other local charities, which provide for the needs of older people, and are grateful to Central Surrey Voluntary Action for their continued support regarding volunteer recruitment.

The future has many challenges for charities such as, Age Concern Mole Valley. The main area of focus will be a sustainable fundraising programme for the future and also the recruitment of more volunteers to support all that we deliver.

The Future

Age Concern Mole Valley will continue to develop and build on the invaluable work it has achieved in previous years. Our vision is to 'improve the lives of older people', and as we end this financial year and go into the next, we continue to face the challenge of fundraising and the recruitment of new volunteers. We will not change our key strategic aims which underpin all our future plans to continue our invaluable services.

In March 2025 we secured funding from the 'The National Lottery Community Fund' for the following year, which is good start to our 2025/26 fundraising plan. There are several funders that have supported Age Concern Mole Valley over the years, and we hope they will continue to be supportive, so that we can build a sustainable fundraising programme for the future.

We will continue to deliver the services that are part of Age Concern Mole Valley's 'Local Community Support Services' which encompasses home visiting, a level of information & signposting, befriending, IT/Digital Sessions and Attendance Allowance and Blue Badge Support. We provide an Information & Signposting service open to the public 4 days a week. A lot of our services aim to reduce loneliness and social isolation whilst prolonging independence and enabling older people to remain at home with the appropriate support services.

We will continue to support our elderly clients with additional home visits to revisit their needs over time and to see if any additional information and signposting would enhance their quality of life. In relation to the Befriending service – we will still be flexible and person-centred as every volunteer and client and their particular circumstances will be different.

Governance – I will continue to review the many policies and procedures required to manage the charity legally, safely and effectively. The Charity's Trustees will meet on Zoom and face-to-face over the next 12 months. **General Data Protection Regulation** - we continued to have this as an area of focus at each Executive Committee meeting.

Information Technology (IT) Developments – we will continue to develop our cloud-based database system 'Charitylog', which enables staff to work from 'the cloud', on every aspect of our operational activities from any location that has Wi-Fi, which is fully appreciated, as most staff are now on hybrid working. We will also continue to develop our website: www.ageconcernmolevalley.org.uk.

Information and Signposting/Advice – this will continue to be an area of development and updating in 2025/26 with a review of the organisations. This will be essential, so that we can signpost people to local services as they emerge and develop. We will continue to build on the current service, revisiting contacts and double checking our information, so that we provide a useful information portal for those looking for services to support older people. We will also continue to develop the Attendance Allowance/Blue Badge support strand of this service to support the provision of care services for older people.

Information Technology (IT)/Digital Learning Sessions – the valuable IT/Digital Learning sessions will continue in 2025 in Dorking. We will use a similar approach as with the Befriending Service,

person-centred as every volunteer and learner will have their own preferences regarding their learning approach. We will also aim to recruit additional volunteers to support these sessions, so we can in turn help more 'learners' discover the benefits of information technology, especially around connecting them to family and friends.

Volunteers' Week – we have a summer event planned in June 2025 to celebrate Volunteers' Week. This will be an opportunity to take time to say a 'big thank you' to our volunteers' for all their support. We plan to also hold a Christmas event for our volunteers in December 2025. A challenge for next year is Volunteer Recruitment – it has been recognised that since the Coronavirus pandemic there is a general shortage of volunteers. We like many charities, are finding it hard to recruit more volunteers, and we have lots of lonely/isolated older people that would like a Volunteer Befriender to visit, so it will be a priority.

Partnership Working – we will continue to contribute and work in partnership with a network of local organisations that support older people across Mole Valley, facilitated by Mole Valley District Council.

It has been another memorable and eventful year. We have achieved a lot over this period, especially in relation to reducing loneliness and isolation and improving the lives of older people, which is always the ultimate vision of the charity.

We have had to say goodbye and a special thank you to Radhika Lakshman who left for a new career move with the NHS. We wish her all the best in her new venture. With Radhika leaving in June 2024, we have welcomed Diana Webb, as our new Volunteer Coordinator. With new people coming onboard it is always an opportunity to review what and how we deliver our services, taking on board new ideas, which we will do next year.

A huge 'thank you' to the entire staff team over this year, Diana, June, and Zoe for all their hard work and commitment. It has been a difficult year for the team, but their conscientiousness has been outstanding and limitless to supporting older people with our much needed services.

This year was challenging in relation to fundraising, thank you to all the trusts, foundations and organisations that supported our important work.

Our vision 'improving the lives of older people' is as always central to all that we deliver and will continue to develop in the future.

Sonia Hubbard, Chief Executive Officer

Message from the Chairman

The Voluntary, Community and Faith Sector make a huge contribution to the lives of people in Mole Valley, providing a range of services and support to the community. Age Concern Mole Valley will continue to provide and build on its invaluable support services to older people, so in turn their service delivery will impact and make a difference to the community in Mole Valley, and 'improving the lives of older people'.

I would like to thank all my Trustee colleagues and all our wonderful volunteers for their support of our clients and 'learners', plus Sonia Hubbard (CEO) and the staff team for their continued hard work in support of the charity and their strong commitment to our vision.

Sally Dubery
Chairman

Financial Review

Income for the period totalled £94,982 including several grants from charitable trusts and foundations, together with donations from individuals and local organisations.

Expenditure was maintained at a similar level to the previous year £85,565.

This results in an overall surplus of £9,418. At the end of the year, the charity had restricted funds of £28,500, funding received for 2025/26. The charity has reserves of £23,294.

Reserves Policy and Risk Management
The Trustees have carefully considered the forecast of income and expenditure for the year 2024/25 and have concluded that it is appropriate to utilise the reserves £23,294, in maintaining the resources available to the organisation to enable it to continue its activities in key areas.

Trustees' Responsibilities in relation to the Financial Statements
Charity law requires the Trustees to prepare financial statements that give a true and fair view of the state of affairs of the charity at the end of each financial year and of its surplus or deficit for the financial year. In doing so, the Trustees are required to:

- Select suitable accounting policies and apply them consistently
- Make judgements and estimates that are reasonable and prudent
- Prepare the financial statements on a going concern basis unless it is inappropriate to assume that the charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the new FRS 102 (SOFA) and the Charities Act 2011.

The Trustees are also responsible for the safeguarding of the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Reference and Administration
Legal and reference information, which is shown after the contents page, forms part of this report. The financial statements comply with the current statutory requirements, the charity's governing document and the SORP 'Accounting and Reporting by Charities'.

On behalf of the Trustees _____ 28.10.25 _____

Independent examiner's report on the accounts

Section A — **Independent Examiner's Report**

Report to the trustees/ members of: Age Concern Mole Valley

On accounts for the year ended: 31st March 2025 **Charity no (if any):** 1111678

Set out on pages: 1 to 1

Respective responsibilities of trustees and examiner The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:
   - to keep accounting records in accordance with section 130 of the Charities Act; and
   - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act

   have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed: A. Wheeler **Date:** 01/07/25

Name: Andrew Wheeler

Relevant professional qualification(s) or body (if any): ACCA

Address:
Taxsense Accountants
203 West Street
Fareham
Hampshire
PO16 0EN

Age Concern Mole Valley	1111678

Receipts and payments accounts

CC16a

For the period from	1/4/2024	To	31/03/2025

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Charitable Trusts		83,500	-	83,500	65,180
Services provided	314	-	-	314	636
Donation & Legacies	11,169	-	-	11,169	15,666
Interest Received		-	-		
Sub total*(Gross income for AR)*	11,482	83,500	-	94,982	81,482
A2 Asset and investment sales, (see table).					
Sub total		-	-		
Total receipts	11,482	83,500	-	94,982	81,482
A3 Payments					
Expenditure on raising funds	455			455	3,902
Expenditure on Charitable Activities	1,610	83,500		85,110	85,065
Sub total	2,065	83,500		85,565	88,967

A4 Asset and investment purchases, (see table)					
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	**2,065**	**83,500**	-	**85,565**	**88,967**
Net of receipts/(payments)	**9,418**	-	-	**9,418**	**-7,485**
A5 Transfers between funds		-	-		
A6 Cash funds last year end	**42,647**		-	**42,647**	**49,568**
Cash funds this year end	**52,065**	-	-	**52,065**	**42,083**

Section B Statement of assets and liabilities at the end of the period

Categories	Details	**Unrestricted funds** to nearest £	**Restricted funds** to nearest £	**Endowment funds** to nearest £
B1 Cash funds	Cash at bank	**52,065**	-	-
			-	-
			-	-
	Total cash funds	**52,065**	-	-

(agree balances with receipts and payments account(s))

Unrestricted funds	**Restricted funds**	**Endowment funds**

B2 Other monetary assets

Details	to nearest £	to nearest £	to nearest £
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
Tangible Assets	Unrestricted	10,719	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
Pension payable		64	
Accruals		206	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Sally Dubery	
	Elaine Machin	

Charity Number 1111678

Note 1 2025 Income and Expenditure Funds

Income and Endowments	**2025**	**2024**
	£	**£**
Receipts from Gift Aid/Royalties	314	636
General donations	11,169	15,666
Restricted Funds/Grants	83,500	65,180
Charity income 2024/25 totals	**94,982**	**81,482**
Resources Expended		
Expenditure for raising funds		
Direct fundraising expenses	455	1,215
Allocation of general overhead expenses	2,055	2,687
Direct Charitable Expenditure		
Visiting and Befriending, Information and Signposting	1,500	5,900
Staff Payroll	76,543	73,973
IT Support/Laptops/Broadband etc.	2,562	2,772
Accountancy fees	830	755
Training	0	28
Website/ Marketing development	292	244
Governance	767	720
Sundry Expense	0	0
Bank Charges	71	88
Depreciation on office equipment	488	585
Total Direct Charitable Expense	**85,565**	**88,967**
Surplus for the year to transfer to reserves	**9,418**	**-7,485**

Age Concern Mole Valley

Balance Sheet **As at 31.03.2025**	**£** **2025**		**£** **2024**	
Fixed Assets				
Tangible assets	-		488	
Investments	-		-	
Current Assets				
Debtor			-	
Cash at bank	52,065		42,083	
	52,065		42,571	
Current Liability				
Creditors:				
Amounts falling due within one year				
PAYE				
Pension	64		64	
Accruals	206		131	
	271		195	
Net current assets		51,794		42,376
Total assets less current liabilities		51,794		42,376
				-
Long term loans		-		-
Net Assets		**51,794**		**42,376**
Designated funds				65,000
Unrestricted funds		23,294		(22,634)
Restricted funds		28,500		
Total Charity funds		**51,794**		**42,376**

Client Approval Certificate

I approve these accounts and confirm that I have made available all relevant records and information for their preparation.

Signed: .....

Dated 28.10.25

Notes to the Financial Statements as of 31 March 2025

1. Basis of Preparation

The financial statements have been prepared under the historic cost convention, following the recommendations of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in 2014 covering charities with a year end after January 2015.

2. Accounting Policies

a) Income

All income is accounted for on an accrual basis, except for voluntary donations, which are taken into account when received Grants are recognised in full during the year that they are received Incoming receipts from tax reclaims are included in the SOFA at the same time as the gift to which they relate.

b) Fixed Assets

Fixed assets are stated at cost and depreciation is provided at rates calculated to write off the cost of each asset over its expected useful life Computer equipment and office equipment 25% straight line basis It is the Charity's policy to capitalise fixed assets that are above a de minimis level of £500.

c) Resources expended

Resources are accounted for on an accruals basis. Expenditure is appointed to cost categories based on the amount attributable during the year, including the cost of generating funds, charitable activities. Governance costs include legal costs and Trustee meetings only.

d) Recognition of liabilities

These financial statements recognise all liabilities that the charity has responsibility for. The charity is not aware of any contingent liabilities.

3. Staff

The charity has been well represented by Sonia Hubbard, Diana Webb, Zoe Stockwell and June Mills throughout the year.

4. Tangible Fixed Assets	31.03.2025	31.03.2024
Cost	10719	10719
Addition	-	-
Accumulated Depreciation	-10231	-10231
Depreciation Charge	-488	
	0	488

5. Other Creditors	31.03.2025	31.03.2024
	64	64
Pensions Fund	206	131
	271	195

6. Commitments

There are no other commitments not recorded in the financial statements.

AGE CONCERN MOLE VALLEY

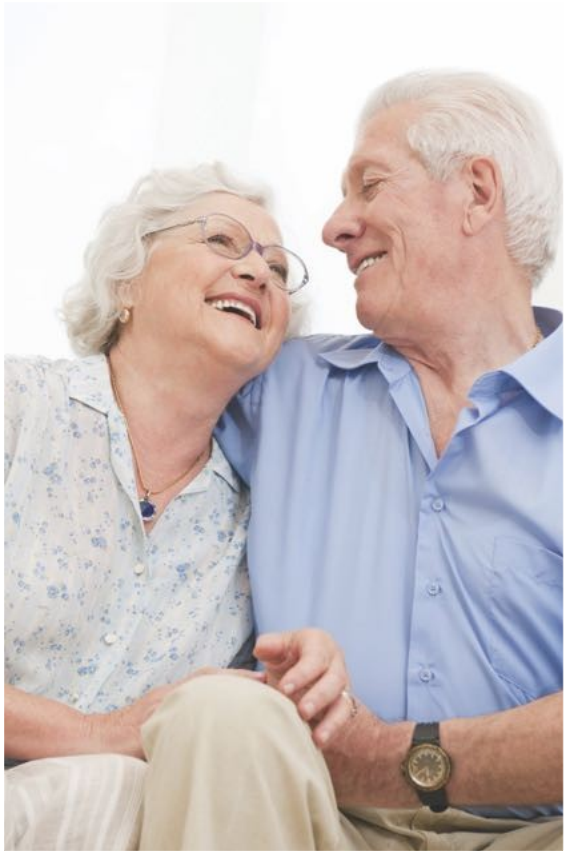
England & Wales - Charity number 1111678

Accounts

AGE Concern Mole Valley

Improving the lives of older people

Making later life a fulfilling and enjoyable experience



ANNUAL REPORT

2023-2024

Registered Charity No 1111678
Registered Company No 5409543

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LEGAL & ADMINISTRATION

Registered Charity Number: 1111678
(England and Wales)

Registered Company Number: 5409543
(England and Wales)

Registered Address
The Point, Mayflower Centre, Lyons Court, Dorking, Surrey RH4 1AB

Executive Committee

Chair	Sally Dubery
Trustee	Elaine Machin
Trustee	Dennis Wickham

All members of the Executive Committee are Trustees and Volunteers, and we thank you for your support.

Staff

Chief Executive Officer	Sonia Hubbard
Information & Signposting Officer	Julia Gallagher (Retired Dec 23)
Volunteer Coordinator	Andrea Kelley (Retired Apr 23)
Administrator	June Mills
Volunteer Coordinator	Radhika Lakshman (Appointed May 23)
Befriending Service Coordinator	Zoe Stockwell (Appointed Jan 24)

Bankers
H S B C, 18 North Street, Leatherhead, Surrey KT22 7AR

Independent Examiner
Andrew Wheeler, Taxsense Accountants, 203 West Street, Fareham, Hants PO16 0EN

REPORT OF THE TRUSTEES FOR THE

12 MONTHS TO 31 MARCH 2024

The Trustees present their report with the financial statements of the charity for the year ended 31 March 2024.

The Trustees have adopted the provisions of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in January 2015.

Structure, Governance and Management
The company is registered as a charitable company limited by guarantee and was set up by Memorandum and Articles of Association. Age Concern Mole Valley is run by an Executive Committee of Trustees. The Committee meets every 2 months.

The charity has a strategic business plan for 2016-24 in place, which underpins the direction taken. However, the vision and mission of the charity and taking into account the many challenges and opportunities, means the charity also needs to be flexible and ready to respond to environmental changes.

Vision and Mission
The vision of Age Concern Mole Valley is all encompassing and clear, 'Improving the lives of older people' and the mission is 'Making later life a fulfilling and enjoyable experience'. These both underpin all that the charity aims to accomplish in the future.

Age Concern Mole Valley will continue to support older people over 50, but will focus service delivery on people who have reached the statutory pension age and above.

Values and Strategic Aims
The key strategic aims of focus that underpin the charity's direction are as follows:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

Each of these key aims has underlying objectives and outcomes, so that Age Concern Mole Valley can focus on achieving its vision of 'improving the lives of older people' and its mission of 'Making later life a fulfilling and enjoyable experience'.

Activities

Age Concern Mole Valley has provided consistent office opening hours in Dorking, four days a week, Monday, Tuesday, Thursday, 09.00 am-1.00 pm., and Friday 09.00 am-12.00 pm, where we provide an all-encompassing Information & Signposting Service.

The charity has continued to be very active throughout the year. We continued to provide the Age Concern Mole Valley 'Local Community Support Programme', which encompasses, Home Visiting, Information & Signposting, Telephone Befriending, Befriending, Social Events, IT/Digital Sessions and Will Writing Clinics over this period.

Home Visiting

We have continued to support our clients and to liaise with various referral agencies. This is where we are able to identify the specific needs of the individual, with Information & Signposting to services that can help improve day-to-day circumstances, e.g., home help support. We aim to support people to be able to live independently for as long as possible and enable older people to decide on the services they want to employ but also to encourage community engagement.

Befriending/Telephone Befriending

The Befriending and Telephone Befriending Service is around addressing loneliness and isolation by organising a volunteer to regularly telephone/visit the older person on a weekly basis to provide a listening ear. Our Volunteer Coordinator has recruited many new volunteers and facilitated the valuable match-making process between the volunteer and the client, as this service's journey develops. In this period, we had completely returned to face-to-face Befriending with our volunteers visiting their clients in their homes.

Information & Signposting Service – our Administrator has continued to give help and guidance from our office on a wide range of issues to older people living in the Mole Valley area, and to members of their families, plus the general public.

The charity's **Information Technology (IT)/Digital Training sessions** continued in 2023/24 in both Leatherhead at the Fairfield Centre and at the Point in Dorking.

Events - we did not hold any events during this period, but we aim to start these again in the future.

Governance – over this period the CEO has continued to review the many policies and procedures required to manage the charity legally, safely and effectively. The Charity's Trustees have met on Zoom and face-to-face over these 12 months. General Data Protection Regulation - we continued to have this as an area of focus at each Executive Committee meeting.

Information Technology (IT) Developments – over this period we have continued to develop our cloud-based database system 'Charitylog', which enables staff to work from 'the cloud', on every aspect of our operational activities from any location that has Wi-Fi, which was fully appreciated with the move for most staff to hybrid working. We have also continued to develop our website: www.ageconcernmolevalley.org.uk.

Partnership working – we have continued to attend various partnership meetings over this period via Zoom/Teams and attend informative events/conferences to remain knowledgeable regarding the development and environmental factors affecting older people.

In relation to these activities and developments over the last year, the following section gives details of what the charity has achieved in this year.

Achievements and Performance – 2023 to 2024
The following were our key strategic focus over this period, along with the Business Plan's objectives:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

In this financial year Age Concern Mole Valley had fully returned to all its main face-to-face services and supported older people with over 5000 activities and continued to develop core projects, such as, the Home Visiting and Befriending Service, the Information & Signposting Service, and our IT/Digital Sessions in Dorking and Leatherhead. Here are some of the key achievements in this financial year as we returned completely to normal service delivery.

Dorking Office - our office in Dorking has been open 4 days per week and staffed by June Mills, our Administrator. We were open to the public for information & signposting and for news and booking of Age Concern Mole Valley services throughout the year.

The Age Concern Mole Valley 'Local Community Support Programme' encompasses: Home Visiting, Information & Signposting, Telephone Befriending/Befriending, Social Events, IT/Digital Sessions and Attendance Allowance/Blue Badge support:

The Information and Signposting Service, 'Pointing you in the Right Direction' has continued to develop extensively over this period, with Julia Gallagher our Information & Signposting Officer and June Mills our Administrator, adding new and updating records on a regular basis. We have also had the support of Davina Benneworth our Administrative Volunteer with updating this service over this period.

The Age Concern Mole Valley Information & Signposting Service is there to assist the public and it also aims to support older people to live at home, independently for as long as possible, through effective signposting to a range of services and support.

In previous years, e.g., 2019/20 we noted over 600 general enquiries. Whereas, 2023/24 we had over 800 general enquiries. This year we have added over 40 new organisations and updated over 220 organisations and the service has noted over **1280 activities, including over 800 individual enquiries,** most of which will often be signposting to more than one service, as we like to give people choice. The development and updating of this invaluable resource is always an ongoing action. We have also added more new referral agencies, making a total of over 296 referral agencies and professionals that signpost older people into our services for support.

This year, the Information & Signposting service has developed an additional strand, because of a demand/need for Attendance Allowance/Blue Badge form completion support, which is lacking in Mole Valley.

Home Visiting has continued throughout the year with face-to-face client meetings with Julia Gallagher until December 2023 when she retired and then Zoe Stockwell, taking over in January 2024 as our Befriending Service Coordinator. Our work aims to support older people to live independently for as long as possible, through effective Information & Signposting. The outcome of reduced loneliness and isolation does improve a person's health and wellbeing, a healthier older person can then live safely at home with independence. When the client is ready, we then move onto the Befriending service and make a match with a volunteer. This process is important for both people, especially around finding the right match, it requires listening skills and a great deal of perception, so that the service works for both parties, and we achieve our outcomes of reduced loneliness and isolation.

The **Befriending/Telephone Befriending Service** continues to be a vital contribution to reducing loneliness and isolation and increasing community cohesion with local communities coming together, plus improving the health and wellbeing of the older person and in some cases the volunteer. The aim is to enable the older person to regain social and interpersonal skills which may have become less due to the loss of a loved one, friends, or a close relative moving out of the area.

Photo: Volunteer Befriender, Jenny Bodkin, visiting Joyce Stafford at home

Andrea Kelley, our Volunteer Coordinator, retired in April 2023 and Radhika Lakshman continued her good work in

May 2023 as our new Volunteer Coordinator. We would not have been able to assist our clients without our dedicated staff and volunteers.

Befriending Service Feedback/Impact Survey - in 2022 we introduced our own impact survey with some of the questions based on the UCLA 3-item loneliness scale, which asks people indirectly about emotions associated with loneliness and isolation. When a new older person joins, we use the survey to assess specific areas and then we revisit these areas after 6 months to assess the difference the service has made to that person, after a Volunteer Befriender has started to visit. Here are some of the questions (3 out of 8) and our findings in 2023, where we asked new Befriending Service clients:

Questions asked to clients	Prior to Volunteer visits	After 6 months of Volunteer visits
Do you often feel isolated from others?	75% of people said yes – often	63% of people said hardly ever/never
How often do you feel lonely	87% of people said often	75% of people said hardly ever
Are you able to talk to people and tell them how you feel?	88% said sometimes	75% said often or always

Here are some examples from both the client and the volunteer of how this vital service is 'improving the lives of older people':

> *"My name is Chris, and I am very fortunate to have the befriending service from Age Concern Mole Valley, my friend being Peter. He visits me weekly and sometimes we sit and talk over tea and sometimes we go for a drive in the Surrey Hills including Newlands Corner and all the glorious surrounding villages. I enjoy this so much as I don't get out much of course, and the difference that this makes to my life and mental health just cannot be put into words, it's like being in a very overcast and miserable day and then the sun comes out and I feel human again like there IS some point to life again I truly spend the rest of the week looking forward to these visits, and just cannot thank Peter and all the other volunteers involved with Age Concern Mole Valley for their selfless giving of their own time to make the absolute immense difference to the lives of people like myself, angels on earth thank you so very much from the bottom of my heart." Chris, ACMV Befriending Service Client*

> *"The befriender role far exceeded my expectations, such an important and vital role. John and I got on so well that my visits were normally 2.5 to 3 hours. I will be sad not to be visiting him anymore." (ACMV Volunteer)*

"Ruth is a very intelligent lady and a really nice person. It's really nice to have a proper conversation with someone." (Befriending Service client)

'When I said to Lindsay, I am so happy the match with Rosa is going so well, she said "it was written in the stars, it was meant to be"' (ACMV Volunteer)

Over this time period we had 13 new Volunteer Befrienders/Telephone Befrienders, making a total of 65, an increase on the previous year. These volunteers provide an invaluable service to lonely and isolated older people. This is highly appreciated by Age Concern Mole Valley and the person they are visiting.

Information Technology (IT)/Digital Sessions – these sessions are for people over 50 years old and were in operation in both Dorking and Leatherhead. In terms of face-to-face IT/Digital sessions - we held 6 courses, with each course running for 6-8 weeks and in total we have held over 100 learner sessions.

We have also used a similar impact assessment approach to the IT/Digital sessions. Over 2023, we had 40 'learners' respond after the 6 sessions, and 18 saw an improvement of over 72% in their key learning objective, e.g., skills/knowledge of IT and their gadget. In relation to keeping in touch via Zoom, email, texting, etc., 14 out of 23 showed an improvement of over 60-80% of being able to contact friends and family.

We have had '8 active volunteers', which support these sessions on a regular basis and without their dedication we would not be able to support so many 'learner sessions'. We would like to thank them all for their ongoing commitment to Age Concern Mole Valley, for their never-ending patience and for sharing their knowledge.

Volunteers' Week, over this period we have had a total of 79 volunteers, and we were able to hold three face-to-face celebratory events in Dorking and Leatherhead. At these events we were able to thank our wonderful volunteers in person for their commitment to Age Concern Mole Valley and the support of our clients throughout the pandemic.

We have continued to recruit new volunteers for the befriending service. We need more and will continue to look to the local community for volunteers to support in delivering our services.

We have had 20 Volunteer/Client matches, so in total we had 65 Volunteer Befrienders over this period. We had 8 active volunteers that helped deliver our Information Technology related learning support. Age Concern Mole Valley is extremely grateful for the unstinting efforts of all its volunteers who are involved in service provision, and they are highly valued for their support. Without our volunteers we would not be able to achieve our aims and objectives and 'Improve the lives of older people' in Mole Valley.

Fundraising and Grant Applications:

Age Concern Mole Valley was nominated as the charity for 'Westival' a music festival in West Street, Dorking, which happened in April 2023, it was a fantastic opportunity to raise funds for our charity. With funding from Unum, we were able to develop our fundraising approach at this festival and make the most of the opportunity. We raised £9,954.54 over this weekend and met many locals and raised our profile.

Funding Applications - in 2023/24 one of the key areas of focus by the CEO was to secure funding contributions to support the charity and we want to give thanks for that invaluable support, as follows:

This £2,000 grant went towards the Age Concern Mole Valley Local Community Support Programme, we thank the trust for their contribution and support.

The Allen Lane Foundation – awarded a grant of £3,500 for core costs and it was paid in March 2023 for the April 2023-24 financial year. We thank the foundation for this grant and for giving Age Concern Mole Valley a grant spread over 2 years.

National Lottery Community Fund - in 2021 we received the great news of 3 years' funding. The two £15,000 grants were restricted funds in the financial year, and the reference is "the National Lottery Community Fund" and the programme name is "RC London and Southeast Region". We thank the Community Fund for believing in all our work and supporting Age Concern Mole Valley for 3 years.

Community Foundation for Surrey – we thank the CFS for their ongoing support and the hard work, they do on behalf of the voluntary and community sector in Surrey. We had a £10,000 restricted grant, which went towards the charity's core costs, specifically staff salaries.

This £2,000 grant went towards our Local Community Support Programme, specifically the Holmwoods area of Mole Valley, many thanks for your contribution and support.

The Edward Gostling Foundation supports small community groups, to large national institutions. A restricted £7,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme'. We thank you for your contribution.

Shanly Foundation - this £2,000 grant went towards the Age Concern Mole Valley Local Community Support Programme, many thanks for your contribution and support.

The Sir Jules Thorn Charitable trust kindly

gave a £2,500 donation to Age Concern Mole Valley, and we thank them for their contribution.

Surrey County Council – we had support from Hazel Watson, one of our local county councillors with a £1,180 contribution towards Information Technology that supports our Information & Signposting Service from her Members' Community Allowance. We thank you for your contribution.

We have remained in close contact with Age UK nationally and we have a strong supportive relationship with Age Concern Epsom & Ewell, Age Concern Banstead and Age Concern Merstham, Redhill & Reigate. We also retain close relations with other local charities, which provide for the needs of older people, and are grateful to Central Surrey Voluntary Action for their continued support regarding volunteer recruitment.

Will Writing – in relation to these clinics we did continue this service at Meaby & Co's offices until the end of 2023. This was a valuable service, and we thank Esther Janalli-Brown, solicitor at Meaby & Co for her support and wished her well as she left for a new venture.

The future has many challenges for charities such as, Age Concern Mole Valley. The main area of focus will be a sustainable fundraising programme for the future and also the recruitment of more volunteers to support all that we deliver.

The Future

Age Concern Mole Valley will continue to develop and build on the invaluable work it has achieved in previous years. Our vision is to 'improve the lives of older people', and as we end this financial year and go into the next, we continue to face the challenge of fundraising and the recruitment of new volunteers. We will not change our key aims which underpin all our future plans to continue our invaluable services:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

We have secured a third year of funding from the 'The National Lottery Community Fund' for the following year, which is good start to our 2024/25 fundraising plan. There are several funders that have supported Age Concern Mole Valley over the years, and we hope they will continue to be supportive, so that we can build a sustainable fundraising programme for the future.

We will continue to deliver the Age Concern Mole Valley 'Local Community Support Programme' which encompasses home visiting, a level of information & signposting, befriending, IT/Digital Sessions and Attendance Allowance and Blue Badge Support. The programme is ongoing, it aims to reduce loneliness and social isolation whilst prolonging independence and enabling older people to remain at home with the appropriate support services.

We will continue to support our elderly clients with additional home visits to revisit their needs over time and to see if any additional information and signposting would enhance their quality of life. In relation to the Befriending service – we will still be flexible and person-centred as every volunteer and client and their particular circumstances will be different.

In relation to **General Data Protection Regulation (GDPR),** the charity will continue to review processes throughout the year.

Information and Signposting – this will continue to be an area of development and updating in 2024/25 with a review of the organisations. This will be essential, so that we can signpost people to local services as they emerge and develop. We will continue to build on the current service, revisiting contacts and double checking our information, so that we provide a useful information portal for those looking for services to support older people. We will also continue to develop the Attendance Allowance/Blue Badge support strand of this service to support the provision of care services for older people.

Information Technology (IT)/Digital Learning Sessions – the valuable IT/Digital Learning sessions will continue in 2024 in both Leatherhead and Dorking. We will use a similar approach as with the Befriending Service, person-centred as every volunteer and learner will have their own preferences regarding their learning approach. We will also aim to recruit additional volunteers to support these sessions, so we can in turn help more 'learners' discover the benefits of information technology, especially around connecting them to family and friends.

Volunteers' Week – we have a summer event planned in June 2024 to celebrate Volunteers' Week. This will be an opportunity to take time to say a

'big thank you' to our volunteers' for all their support. We plan to also hold a Christmas event for our volunteers in December 2024. A challenge for next year is Volunteer Recruitment – it has been recognised that since the Coronavirus pandemic there is a general shortage of volunteers. We like many charities, are finding it hard to recruit more volunteers, and we have lots of lonely/isolated older people that would like a Befriender to visit, so it will be a priority.

Partnership Working – we will continue to contribute and work in partnership with a network of local organisations that support older people across Mole Valley, facilitated by Mole Valley District Council.

Will Writing – we do plan to continue this valuable service and work in partnership with another solicitor. We thank Esther Janalli-Brown, solicitor at Meaby & Co for her support in 2023.

It has been another memorable and eventful year. We have achieved a lot over this period, especially in relation to reducing loneliness and isolation and improving the lives of older people, which is always the ultimate vision of the charity.

We have had to say goodbye and a special thank you to both Julia Gallagher and Andrea Kelley who both retired over this period. There were both committed to Age Concern Mole Valley and supported our services, clients and volunteers with their usual motivation and dedication. We wish them both a happy retirement.

With staff retiring we have welcomed two new team members, Radhika Lakshman our Volunteer Coordinator and Zoe Stockwell, Befriending Service Coordinator. With new people coming onboard it is always an opportunity to review what and how we deliver our services, taking on board new ideas.

A huge 'thank you' to the entire staff team over this year, Andrea, Julia, June, Radhika and Zoe for all their hard work.

Our vision 'improving the lives of older people' is as always central to all that we deliver and will continue to develop in the future.

Sonia Hubbard, Chief Executive Officer

Message from the Chairman

The Voluntary, Community and Faith Sector make a huge contribution to the lives of people in Mole Valley, providing a range of services and support to the community. Age Concern Mole Valley will continue to provide and build on its invaluable support services to older people, so in turn their service delivery will impact and make a difference to the community in Mole Valley, and 'improving the lives of older people'.

I would like to thank all my Trustee colleagues and all our wonderful volunteers for their support of our clients and 'learners', plus Sonia Hubbard (CEO) and the staff team for their continued hard work in support of the charity and their strong commitment to our vision.

Sally Dubery
Chairman

Financial Review

Income for the period totalled £81,482 including several grants from charitable trusts and foundations, together with donations from individuals and local organisations.

Expenditure was maintained at a similar level to the previous year £88,967.

This results in an overall deficit of £7,485
At the end of the year, the charity has designated reserves of £20,000, which are 3 months running costs and form the charity's reserves policy.

Reserves Policy and Risk Management
The Trustees have carefully considered the forecast of income and expenditure for the year 2023/24 and have concluded that it is appropriate to utilise the reserves in maintaining the resources available to the organisation to enable it to continue its activities in key areas.

Trustees' Responsibilities in relation to the Financial Statements
Charity law requires the Trustees to prepare financial statements that give a true and fair view of the state of affairs of the charity at the end of each financial year and of its surplus or deficit for the financial year. In doing so, the Trustees are required to:

- Select suitable accounting policies and apply them consistently
- Make judgements and estimates that are reasonable and prudent
- Prepare the financial statements on a going concern basis unless it is inappropriate to assume that the charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the new FRS 102 (SOFA) and the Charities Act 2011.

The Trustees are also responsible for the safeguarding of the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Reference and Administration
Legal and reference information, which is shown after the contents page, forms part of this report. The financial statements comply with the current statutory requirements, the charity's governing document and the SORP 'Accounting and Reporting by Charities'.

On behalf of the Trustees

Independent Examiner's Report

Report to the trustees/ members of	Age Concern Mole Valley		
On accounts for the year ended	31st March 2023	**Charity no**	1111678
Set out on pages	1 to 4		

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5) (b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:

   - to keep accounting records in accordance with section 130 of the Charities Act; and
   - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act

   have not been met; or

2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed: _____ **Date:** _____

Name:	Andrew Wheeler
Relevant professional qualification(s) or body (if any):	ACCA
Address:	Taxsense Accountants
	203 West Street, Fareham, Hampshire PO16 0EN

CHARITY COMMISSION FOR ENGLAND AND WALES

Age Concern Mole Valley	1111678	CC16a

Receipts and payments accounts

For the period from	1/4/2023	To	31/03/2024

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Charitable Trusts		65,180	-	65,180	65,524
Services provided	636	-	-	636	306
Donation & Legacies	15,666	-	-	15,666	20,138
Interest Received		-	-		
Sub total*(Gross income for AR)*	16,302	65,180	-	81,482	85,968
A2 Asset and investment sales, (see table).					
Sub total		-	-		
Total receipts	16,302	65,180	-	81,482	85,968
A3 Payments					
Expenditure on raising funds	3,902	-	-		3,010
Expenditure on Charitable Activities	19,885	65,180	-		85,008
Sub total	23,787	65,180	-	88,967	88,018

A4 Asset and investment purchases, (see table)					
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	23,787	65,180	-	88,967	88,018
Net of receipts/(payments)	-7,485		-	-7,485	-2,050
A5 Transfers between funds			-		
A6 Cash funds last year end	49,568		-	49,568	50,959
Cash funds this year end	42,083	-	-	42,083	48,909

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	42,083	-	-
			-	-
			-	-
	Total cash funds	42,083	-	-

(agree balances with receipts and payments account(s))

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
Tangible Assets	Unrestricted	10,719	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
Pension payable		64	
Accruals		131	

Age Concern Mole Valley

For the Year Ended 31 March 2024

Charity Number 1111678

Note 1 2024 Income and Expenditure Funds

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Sally Dubery or Elaine Machin	19.11.24
		19.11.24

Income and Endowments	**2024**	**2023**
	£	**£**
Receipts from Gift Aid/Royalties	636	306
Computer donations	-	
General donations	15,666	20,138
Restricted Funds/Grants (see pages 11-12)	65,180	65,524
Charity income 2023/24 totals	**81,482**	**85,968**
Resources Expended		
Expenditure for raising funds		
Direct fundraising expenses	1,215	958
Allocation of general overhead expenses	2,687	2,052
Direct Charitable Expenditure		
Visiting and Befriending, Information and Signposting	5,900	6,300
Staff Payroll	73,973	73,316
IT Support/Laptops/Broadband etc.	2,772	2,589
Accountancy fees	755	686
Training	28	55
Website/ Marketing development	244	302

Age Concern Mole Valley **Balance Sheet** **As at 31.03.2024**	**£** **2024**		**£** **2023**	
Fixed Assets				
Tangible assets	488		1,073	
Investments	-		-	
Current Assets				
Debtor	-		-	
Cash at bank	42,083		48,909	
	42,571		49,982	
Current Liability **Creditors:** **Amounts falling due within one year**				
PAYE Pension	64		59	
Accruals	131		62	
	195		121	
Net current assets		42,376		49,861
Total assets less current liabilities		42,376		49,861

		-
Long term loans	-	-
Net Assets	**42,376**	**49,861**
Designated funds	65,000	65,000
Unrestricted funds	(22,624)	(15,139)
Restricted funds	-	
Total Charity funds	**42,376**	**49,861**

Client Approval Certificate

I approve these accounts and confirm that I have made available all relevant records and information for their preparation.

Signed:

_____ ___.

Dated

_____

Age Concern Mole Valley

Notes to the Accounts For the year ended 31 March 2024

Notes to the Financial Statements as of 31 March 2024

1. Basis of Preparation

The financial statements have been prepared under the historic cost

convention, following the recommendations of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in 2014 covering charities with a year end after January 2015.

2. Accounting Policies

a) Income

All income is accounted for on an accrual basis, except for voluntary donations, which are taken into account when received Grants are recognised in full during the year that they are received Incoming receipts from tax reclaims are included in the SOFA at the same time as the gift to which they relate.

b) Fixed Assets

Fixed assets are stated at cost and depreciation is provided at rates calculated to write off the cost of each asset over its expected useful life Computer equipment and office equipment 25% straight line basis It is the Charity's policy to capitalise fixed assets that are above a de minimis level of £500.

c) Resources expended

Resources are accounted for on an accruals basis. Expenditure is appointed to cost categories based on the amount attributable during the year, including the cost of generating funds, charitable activities. Governance costs include legal costs and Trustee meetings only.

d)
Recognition of liabilities

These financial statements recognise all liabilities that the charity has responsibility for. The charity is not aware of any contingent liabilities.

Age Concern Mole Valley
Notes to the Accounts For the year ended 31 March 2024

3. Staff

The charity has been well represented by Sonia Hubbard, Julia Gallagher, Radhika Lakshman, Zoe Stockwell and June Mills throughout the year.

4. Tangible Fixed Assets	31.03.2024	31.03.2023
Cost	10719	10719
Addition	-	-
	-	
Accumulated Depreciation	9646	-9646
	-	
Depreciation Charge	585	
	488	1073

5. Other Creditors

Pensions Fund		59
		62
	64	

131	
195	121

During the year, the Charity took one office space at the Point in Dorking.

This lease continues until February 2024 at an annual cost of £6,300, but with a general break clause after 3 months' notice.

9061

7. Commitments

There are no other commitments not recorded in the financial statements.

AGE CONCERN MOLE VALLEY

England & Wales - Charity number 1111678

Accounts

AGE Concern Mole Valley

Improving the lives of older people

Making later life a fulfilling and enjoyable experience

ANNUAL REPORT

2022-2023

Registered Charity No 1111678
Registered Company No 5409543

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LEGAL & ADMINISTRATION

Registered Charity Number: 1111678
(England and Wales)

Registered Company Number: 5409543
(England and Wales)

Registered Address
The Point, Mayflower Centre, Lyons Court, Dorking, Surrey RH4 1AB

Executive Committee

Chair	Sally Dubery
Trustee	Pat Clare (Resigned 15.11.22)
Trustee	Elaine Machin
Trustee	Dennis Wickham

All members of the Executive Committee are Trustees and Volunteers, and we thank you for your support.

Staff

Chief Executive Officer	Sonia Hubbard
Information & Signposting Officer	Julia Gallagher
Volunteer Coordinator	Andrea Kelley
Administrative Assistant	June Mills

Bankers
H S B C, 18 North Street, Leatherhead, Surrey KT22 7AR

Independent Examiner
Andrew Wheeler, Taxsense Accountants, 203 West Street, Fareham, Hants PO16 0EN

REPORT OF THE TRUSTEES FOR THE 12 MONTHS TO 31 MARCH 2023

The Trustees present their report with the financial statements of the charity for the year ended 31 March 2023.

The Trustees have adopted the provisions of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in January 2015.

Structure, Governance and Management

The company is registered as a charitable company limited by guarantee and was set up by Memorandum and Articles of Association. Age Concern Mole Valley is run by an Executive Committee of Trustees. The Committee meets every 2 months.

The charity has a strategic business plan for 2016-23 in place, which underpins the direction taken. However, the vision and mission of the charity and taking into account the many challenges and opportunities, means the charity also needs to be flexible and ready to respond to environmental changes.

Vision and Mission

The vision of Age Concern Mole Valley is all encompassing and clear, 'Improving the lives of older people' and the mission is 'Making later life a fulfilling and enjoyable experience'. These both underpin all that the charity aims to accomplish in the future.

Age Concern Mole Valley will continue to support older people over 50, but will focus service delivery on people who have reached the statutory pension age and above.

Values and Strategic Aims

The key strategic aims of focus that underpin the charity's direction are as follows:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

Each of these key aims has underlying objectives and outcomes, so that Age Concern Mole Valley can focus on achieving its vision of 'improving the lives of older people' and its mission of 'Making later life a fulfilling and enjoyable experience'.

Activities

Age Concern Mole Valley has provided consistent office opening hours in Dorking, four days a week, Monday, Tuesday, Thursday, 09.00 am-1.00 pm., and Friday 09.00 am-12.00 pm. The charity has continued to be very active throughout the year. We continued to provide the Age Concern Mole Valley 'Local Community Support Programme', which encompasses, Home Visiting, Information & Signposting, Telephone Befriending, Befriending, Social Events, IT/Digital Sessions and Will Writing Clinics over this period.

Local Community Support Programme

All of our services involve a person-centred approach, and all clients, 'learners' and volunteers were asked their preferences regarding home visiting and any face-to-face services. During this period we continued to use our Key Visiting Guidelines for Volunteers, Clients and Staff, with a focus on staying as safe as possible as we emerged from the pandemic.

Home Visiting

Julia Gallagher, our Information & Signposting Officer has continued to support our clients and to liaise with various referral agencies. The initial face-to-face home visit was reintroduced in 2021, after the pandemic. This is where Julia is able to identify the specific needs of the individual, with Information & Signposting to services that can help improve day-to-day circumstances, e.g., home help support. We aim to support people to be able to live independently and decide on the services they want to employ but also to encourage community engagement.

Befriending/Telephone Befriending

The Befriending and Telephone Befriending Service is around addressing loneliness and isolation by organising a volunteer to regularly telephone/visit the older person on a weekly basis to provide a listening ear. Our Volunteer Coordinator, Andrea Kelley recruited many new volunteers and facilitated the valuable match-making process between the volunteer and the client, as this service's journey develops. In this period we returned to face-to-face Befriending with our volunteers visiting their clients in their home again, which was a positive step forward. Previously, many of our Volunteer Befrienders had become telephone befrienders, supporting their clients with a weekly chat through the pandemic.

Information & Signposting Service – June Mills our Administrative Assistant has continued to give help and guidance from our office on a wide range of issues to older people living in the Mole Valley area, and to members of their families, plus the general public.

The charity's **Information Technology (IT)/Digital Training sessions** continued in 2022/23 in both Leatherhead at the Fairfield Centre and at the Point in Dorking.

Will Writing Clinics – continued through 2022-23 with monthly clinics at the Meaby & Co offices.

Events - we did not hold any events during this period, but we aim to start these again in the future. A lot of charities have been affected by Covid 19 and how they deliver services.

Governance – over this period the CEO has continued to review the many policies and procedures required to manage the charity legally, safely and effectively. Also, various risk analyses have been key to the development of services throughout this period. The Charity's Trustees have met on Zoom and face-to-face over these 12 months. General Data Protection Regulation - we continued to have this as an area of focus at each Executive Committee meeting.

Information Technology (IT) Developments – over this period we have continued to develop our cloud-based database system 'Charitylog', which enables staff to work from 'the cloud', on every aspect of our operational activities from any location that has Wi-Fi, which was fully appreciated with the move for most staff to hybrid working. We have also continued to develop our website: www.ageconcernmolevalley.org.uk.

Partnership working – we have continued to attend various partnership meetings over this period via Zoom/Teams and attend informative events/conferences to remain knowledgeable regarding the development and environmental factors affecting older people.

In relation to these activities and developments over the last year, the following section gives details of what the charity has achieved in another challenging year.

Achievements and Performance – 2022 to 2023
The following were our key strategic focus over this period, along with the Business Plan's objectives:

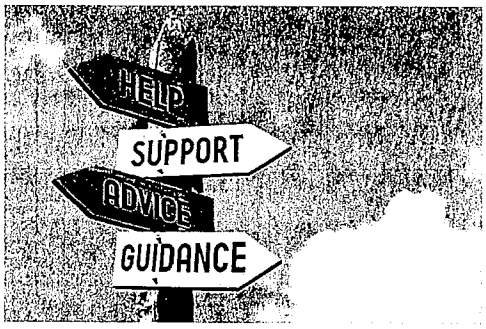
- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

In this financial year Age Concern Mole Valley returned to all its main face-to-face services and supported older people with over 5000 activities and continued to develop core projects, such as, the Befriending and Visiting Service, the Information & Signposting Service, and restarted our IT/Digital Sessions in Dorking and Leatherhead. Here are some of the key achievements in such a challenging year as we returned to normal service delivery.

Dorking Office - our office in Dorking has been open 4 days per week and staffed by June Mills, our Administrative Assistant. We were open to the public for information & signposting and for news and booking of Age Concern Mole Valley services throughout the year.

The Age Concern Mole Valley 'Local Community Support Programme' encompasses: Home Visiting, Information & Signposting, Telephone Befriending/Befriending, Social Events, IT/Digital Sessions and Will Writing Clinics:

The Information and Signposting Service has continued to develop extensively over this period, with Julia Gallagher our Information & Signposting Officer and June Mills our Administrative Assistant, adding new and updating records on a regular basis. In previous years, e.g., 2015/16 we noted over 450 enquiries covering various themes, from IT/Digital Sessions, befriending to needing gardening and home support and in 2019/20 we noted over 600 general enquiries. Last year we noted 950 activities, including over 400 individual enquiries. This year we have added over 30 new organisations and updated over 220 organisations and the service has noted over **970 activities, including over 520 individual enquiries,** most of which will often be signposting to more than one service, as we like to give people choice. The development and updating of this invaluable resource is always an ongoing action. We have also added 17 new referral agencies, making a total of over 90 referral agencies that signpost older people into our services for support.



Home Visiting has completely returned to face-to-face meetings with Julia Gallagher visiting old and new clients in their home. Our work aims to support older people to live independently for as long as possible, through effective Information & Signposting. The outcome of reduced loneliness and isolation does improve a person's health and wellbeing, a healthier older person can then live safely at home with independence. When the client is ready, we then move onto the Befriending service and make a match with a volunteer. This process is important for both people, especially around finding the right match, it requires listening skills and a great deal of perception, so that the service works for both parties, and we achieve our outcomes of reduced loneliness and isolation.

The **Befriending/Telephone Befriending Service** continues to be a vital contribution to reducing loneliness and isolation and increasing community cohesion with local communities coming together, plus improving the health and wellbeing of the older person and in some cases the volunteer. The aim is to enable the older person to regain social and interpersonal skills which may have become less due to the loss of a loved one, friends, or a close relative moving out of the area.

In mid-March 2022 and onwards, we returned to our face-to-face Befriending Service. We continued the work we started in 2021, as part of our service delivery plan we still completed various risk analyses with the client and the volunteer, with a focus on both of their visiting preferences. In relation to our person-centred approach, Andrea Kelley, our Volunteer Coordinator, continued to spend considerable and valuable time gathering our volunteers' and clients' views and preferences to get our service delivery back on track, which was achieved.

> *"I thought the induction training was really comprehensive and extremely useful, I feel the volunteers and clients are in safe hands with ACMV" New Volunteer*

We would not have been able to assist our clients without our dedicated staff and volunteers. The return to home visits were a lifeline for many of our clients as we returned to a normal service after the pandemic. Here are some examples from both the client and the volunteer of how this vital service is 'improving the lives of older people':

'William (client) was having counselling for bereavement and depression after losing his wife. Julia his 'Volunteer Befriender' also volunteers at Nower Wood (conservation group). She has introduced him to the group and gone with him but now William occasionally goes on his own. Julia still visits him each week but she has introduced him to another activity that he can join in with when and if he feels like it each week. He now goes on his own to the conservation group, even when Julia is not attending. The Befriending service has helped by reducing William's isolation and with encouragement he has felt more confident to do other activities.'

'I am delighted with how the visits are going with my befriender. It is so nice to have someone to natter with and have something in the diary each week to look forward to. You have found me such a nice person. Thank you.' Client

'I love my job but it is not very rewarding on a personal note, as a volunteer befriender its lovely to do something each week that makes a real difference to someone's life.' Volunteer

'It does seem that my mum continues to enjoy the visits from Megan and really likes Megan's company. Unusually for my mum, the prospect of Megan's visit does not seem to make my mum feel anxious which is a great achievement: Megan must be quite an exceptional person for this to be the case!'

"I see my client once a week for a couple of hours, when I visit her face lights up and eyes twinkle. We have become really good friends and it has certainly made a difference to her life." Volunteer

"I can't thank you enough, you made an excellent choice and couldn't have matched me with anyone better." Client

Over this time period we had 10 new Volunteer Befrienders/Telephone Befrienders, making a total of 66, a slight decrease on the previous year. These volunteers provide an invaluable service to lonely and isolated older people. This is highly appreciated by Age Concern Mole Valley and the person they are visiting.

Information Technology (IT)/Digital Sessions – these sessions are for people over 50 years old and were in operation in both Dorking and Leatherhead. These were previously on hold due to the Covid 19 pandemic. In terms of face-to-face IT/Digital sessions - we held 8 courses, with each course running for 6-8 weeks and in total we have held over 150 learner sessions. We have had '9 volunteers', which support these sessions on a regular basis and without their dedication we would not be able to support so many 'learner sessions'. We would like to thank them all for their ongoing commitment to Age Concern Mole Valley, for their never-ending patience and for sharing their knowledge. Here is some feedback from the 'learners' regarding what they have gained and how they will use what they have learnt on an Age Concern Mole Valley session:

'I hope to be able to contact my friends (one in Albuquerque NM) and enter the New World'

'Getting in touch with friends and family. Ordering goods from catalogues'

'It will give me confidence'

'Solve crosswords and use Facebook to keep an eye on the family. Use of email, Skype etc.'

'Booking online. DIY tips on YouTube'

'Managing all household bills etc. Shopping online. Keeping in touch with friends especially abroad'

'To be able to get my shopping delivered'

'I now have no fear or hesitation in handling either phone/tablet for future'

'Book holidays online'

'I am more confident at using my computer. I will now be able to type letters using the computer'

'Sending messages to my daughter'

'Contact with services, i.e. email, internet shopping and Google information'

Volunteers' Week, over this period we have had a total of 78 volunteers and as we slowly emerged from the Covid 19 pandemic we were able to hold several face-to-face celebratory events in Dorking and Leatherhead. At these events we were able to thank our wonderful volunteers in person for their commitment to Age Concern Mole Valley and the support of our clients throughout the pandemic.

We have continued to recruit new volunteers for the befriending service. We need more and will continue to look to the local community for volunteers to support in delivering our services.

We have had 18 Volunteer/Client matches, with 10 new befriending/ telephone befriender clients, so in total we had 66 Volunteer Befrienders over this period. We had 9 volunteers that helped deliver our Information Technology related learning support. Age Concern Mole Valley is extremely grateful for the unstinting efforts of all its volunteers who are involved in service provision, and they are highly valued for their support. Without our volunteers we would not be able to achieve our aims and objectives and 'Improve the lives of older people' in Mole Valley.

Fundraising and Grant Applications:

Community Coronavirus Care – Local Community Helpers

We would like to thank the 'Local Community Helpers' for their kind donation of £16,043.16.

In March 2020, Community Coronavirus Care (CCC) was created in response to the pandemic, to assist those who were isolating and struggling to achieve daily tasks. They have assisted with over 3672 tasks ranging from shopping, prescription collections, signposting and issuing information, food bank referrals and transport. Not to mention, the 130 festive dinners that were delivered when Christmas got cancelled. This would not have been possible without two main factors. Firstly, their amazing volunteers! They manned the phone line, coordinated the tasks, stood in supermarket queues, took parcels to clients, walked the odd dog, and acted as pharmacy delivery drivers. Secondly, the fantastic individuals, companies, and organisations who helped with donations of every description from financial contributions to software, advice, and support to phone lines and equipment. Each and every one are superheroes who came to the need of their community in a time of crisis.

With the closing of the project, there were surplus funds and CCC decided it was only right for it to be donated to a charity with like-minded objectives within our community, one that closely aligns with the work they have been doing and the people they've been helping. As such, it has been donated to Age Concern Mole Valley.

Funding Applications - in 2022/23 one of the key areas of focus by the CEO was to secure funding contributions to support the charity and we want to give thanks for that invaluable support, as follows:

The Allen Lane Foundation – awarded a grant of £3,500 for core costs and it was paid in March 2022 for the April 2022-23 financial year. We thank the foundation for this grant and for giving Age Concern Mole Valley a grant spread over 2 years.

Ashworth Charitable Trust – awarded a grant of £5,000 went towards the charity's running costs and services, particularly our 'Local Community Support Programme'. We thank you for your contribution.

National Lottery Community Fund - in 2021 we received the great news of 3 years' funding. The two £15,000 grants were restricted funds, and the reference is "the National Lottery Community Fund" and the programme name is "RC London and South East Region". We thank the Community Fund for believing in all our work and supporting Age Concern Mole Valley for 3 years.

Funded by

Community Foundation for Surrey – we thank the CFS for their ongoing support and the hard work, they do on behalf of the voluntary and community sector in Surrey. We had a £9,999 grant, which went towards the charity's core costs, specifically staff salaries. The needs of many of the older people that Age Concern Mole Valley supports will relate to reducing their loneliness and isolation in the community, with the added outcome of improved health and wellbeing. The Age Concern Mole Valley 'Local Community Support Programme' encompasses home visiting, information & signposting, Telephone Befriending and Befriending, etc.

The Edward Gostling Foundation
Enhancing Quality of Life for People in Need

The Edward Gostling Foundation supports small community groups, to large national institutions. The Foundation's aim is to support organisations that have effective solutions to helping those most in need. A £5,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme'. We thank you for your contribution.

Mole Valley District Council: UKSPF Community Capacity Building and Infrastructure Support Grants – this £9,000 grant went towards charity's, running costs, particularly around the Age Concern Mole Valley Local Community Support Programme and the IT/Digital Sessions, many thanks for your contribution and support.

Shanly Foundation - this £5,000 grant went towards the Age Concern Mole Valley Local Community Support Programme, many thanks for your contribution and support.

The Sir Jules Thorn Charitable Trust

The Sir Jules Thorn Charitable trust kindly gave a £2,500 donation to Age Concern Mole Valley, and we thank them for their contribution.

We also received £1000 from unum towards fundraising promotional materials, such as, T-shirts, charity buckets, etc., which was much appreciated, many thanks.

We have remained in close contact with Age UK nationally and we are pleased to remain formally as a "friend". We have a strong supportive relationship with Age Concern Epsom & Ewell, Age Concern Banstead and Age Concern Merstham, Redhill & Reigate. We also retain close relations with other local charities, which provide for the needs of older people, and are grateful to Central Surrey Voluntary Action for their continued support regarding volunteer recruitment.

Will Writing – in relation to these clinics we resumed a face-to-face service in 2022-23 and continued through this period with clinics at Meaby & Co's offices. This is a valuable service, and we work in partnership with **Meaby & Co Solicitors** - we thank Esther Janalli-Brown, solicitor at Meaby & Co for her continued support.

The future has many challenges for charities such as, Age Concern Mole Valley. The main area of focus will be a sustainable fundraising programme for the future and also the recruitment of more volunteers to support all that we deliver.

The Future

Age Concern Mole Valley will continue to develop and build on the invaluable work it has achieved in previous years. Our vision is to 'improve the lives of older people', and as we end this financial year and go into the next, we continue to face the challenge of fundraising and the recruitment of new volunteers. We will not change our key aims which underpin all our future plans to continue our invaluable services:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

We have secured a third year of funding from the 'The National Lottery Community Fund' for the following year, which is good start to our 2023/24 fundraising plan. There are several funders that have supported Age Concern Mole Valley over the years, and we hope they will continue to be supportive, so that we can build a sustainable fundraising programme for the future.

In October 2022, Age Concern Mole Valley was nominated as the charity for 'Westival' a music festival in Dorking, which is planned for April 2023, a fantastic opportunity to raise funds for our charity. With funding from Unum we will be able to develop our fundraising approach at this festival and make the most of this opportunity and raise our profile.

We will continue to deliver the Age Concern Mole Valley 'Local Community Support Programme' which encompasses home visiting, a level of information & signposting, befriending, social events, IT/Digital Sessions and Will Writing clinics. The programme is ongoing, it aims to reduce loneliness and social isolation whilst prolonging independence and enabling older people to remain at home with the appropriate support services.

We will continue to support our elderly clients with additional home visits to revisit their needs over time and to see if any additional information and signposting would enhance their quality of life. In relation to the Befriending service – we will still be flexible and person-centred as every volunteer and client and their particular circumstances will be different.

In relation to **General Data Protection Regulation (GDPR),** the charity will continue to review processes throughout the year.

Information and Signposting – this will continue to be an area of development and updating in 2023/24 with a review of the organisations we added throughout the Coronavirus pandemic. This will be essential, so that we can signpost people to local services as they emerge and develop. We will continue to build on the current service, revisiting contacts and double checking our information, so that we provide a useful information portal for those looking for services to support older people.

Information Technology (IT)/Digital Learning Sessions – the valuable IT/Digital Learning sessions will continue in 2023 in both Leatherhead and Dorking. We will use a similar approach as with the Befriending Service, person-centred as every volunteer and learner will have their own preferences regarding their learning approach. We will also aim to recruit additional volunteers to support these sessions, so we can in turn help more 'learners' discover the benefits of information technology, especially around connecting them to family and friends.

Volunteers' Week – we have several face-to-face events planned in June 2023 to celebrate Volunteers' Week. There will be 3 summer events, where we will take time to say a 'big thank you' to our volunteers' for all their support, especially throughout the Coronavirus pandemic. We plan to also hold a Christmas event for our volunteers in December. A challenge for next year is Volunteer Recruitment – it has been recognised that since the Coronavirus pandemic there is a general shortage of volunteers. We like many charities, are finding it hard to recruit more volunteers, and we have lots of lonely/isolated older people that would like a Befriender to visit, so it will be a priority.

Partnership Working – we will continue to contribute and work in partnership with a network of local organisations that support older people across Mole Valley, facilitated by Mole Valley District Council.

Will Writing – we plan to continue this valuable service and work in partnership with **Meaby & Co Solicitors** in early 2022/23. We thank Esther Janalli-Brown, solicitor at Meaby & Co for her continued support.

Events/Café Project at the Point – we will continue to explore a joint venture with Central Surrey Voluntary Action, which would bring our clients to the Café in the Point for some fun, cake and company.

It has been another memorable and eventful year, as we emerged from the Coronavirus pandemic. A huge 'thank you' to the staff team, Andrea, Julia and June for all their hard work this year. I would especially like to thank Andrea Kelley, our Volunteer Coordinator, for her dedication to Age Concern Mole Valley, Andrea is going to retire in April 2023. We all wish her a happy retirement.

Our vision 'improving the lives of older people' is as always central to all that we deliver and will develop in the future.

Sonia Hubbard, Chief Executive Officer

Message from the Chairman

The Voluntary, Community and Faith Sector make a huge contribution to the lives of people in Mole Valley, providing a range of services and support to the community. Age Concern Mole Valley will continue to provide and build on its invaluable support services to older people, so in turn their service delivery will impact and make a difference to the community in Mole Valley, and 'improving the lives of older people'.

This year we returned to face-to-face delivery across all our services. We as a charity still continued to be very person centred regarding peoples' preferences. I would like to thank all my Trustee colleagues and all our wonderful volunteers for their support of our clients and 'learners', plus Sonia Hubbard (CEO) and the staff team for their continued hard work in support of the charity and their strong commitment to our vision through what were 'unprecedented times' over the last 3 years.

Sally Dubery
Chairman

Financial Review

Income for the period totalled £85,968 including several grants from charitable trusts and foundations, together with donations from individuals and local organisations.

Expenditure was maintained at a similar level to the previous year £88,018.

This results in an overall deficit of £2,050.
At the end of the year, the charity has designated reserves of £30,000, which are 3 months running costs and form the charity's reserves policy.

Reserves Policy and Risk Management
The Trustees have carefully considered the forecast of income and expenditure for the year 2022/23 and have concluded that it is appropriate to utilise the reserves in maintaining the resources available to the organisation to enable it to continue its activities in key areas.

Trustees' Responsibilities in relation to the Financial Statements
Charity law requires the Trustees to prepare financial statements that give a true and fair view of the state of affairs of the charity at the end of each financial year and of its surplus or deficit for the financial year. In doing so, the Trustees are required to:

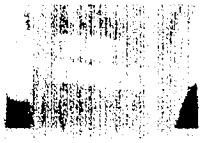
- Select suitable accounting policies and apply them consistently
- Make judgements and estimates that are reasonable and prudent
- Prepare the financial statements on a going concern basis unless it is inappropriate to assume that the charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the new FRS 102 (SOFA) and the Charities Act 2011.

The Trustees are also responsible for the safeguarding of the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Reference and Administration
Legal and reference information, which is shown after the contents page, forms part of this report. The financial statements comply with the current statutory requirements, the charity's governing document and the SORP 'Accounting and Reporting by Charities'.

On behalf of the Trustees



Independent examiner's report on the accounts

Section A — **Independent Examiner's Report**

Report to the trustees/ members of Age Concern Mole Valley

On accounts for the year ended 31st March 2023 **Charity no (if any)** 1111678

Set out on pages 1 to 4

Respective responsibilities of trustees and examiner The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:
   - to keep accounting records in accordance with section 130 of the Charities Act; and
   - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act

have not been met; or

2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed: A. Wheeler **Date:** 18/08/23

Name: Andrew Wheeler

Relevant professional qualification(s) or body (if any): ACCA

Address: Taxsense Accountants
203 West Street
Fareham
Hampshire
PO16 0EN

Age Concern Mole Valley	1111678

Receipts and payments accounts

CHARITY COMMISSION FOR ENGLAND AND WALES

For the period from	1/4/2022	To	31/03/2023

CC16a

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Charitable Trusts		65,524	-	65,524	71,000
Services provided	306	-	-	306	21
Donation & Legacies	20,138	-	-	20,138	5,129
Interest Received		-	-		
Sub total*(Gross income for AR)*	20,444	65,524	-	85,968	76,150
A2 Asset and investment sales, (see table).					
Sub total		-	-		-
Total receipts	20,444	65,524	-	85,968	76,150
A3 Payments					
Expenditure on raising funds	3,010	-	-	3,010	1,498
Expenditure on Charitable Activities	85,008	-	-	85,008	84,780
Sub total	88,018	-	-	88,018	86,279

A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	88,018	-	-	88,018	86,279
Net of receipts/(payments)	- 67,5740	65,524	-	-2,050	-10,129
A5 Transfers between funds		-	-		
A6 Cash funds last year end	50,959	-	-	50,959	60, 381
Cash funds this year end	- 16,615	- 65,524	-	48,909	50,252

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	48,909	-	-
			-	-
			-	-
	Total cash funds	48,909	-	-

(agree balances with receipts and payments account(s))

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
Tangible Assets	Unrestricted	10,719	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
Pension payable		59	
Accruals		62	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Sally Dubery	21.11.23

Age Concern Mole Valley

For the Year Ended 31 March 2023

Charity Number 1111678

Note 1 2022 Income and Expenditure Funds

Income and Endowments	**2023**	**2022**
	£	**£**
Receipts from Gift Aid/Royalties	306	21
Computer donations	-	365
General donations	20,138	4,764
Grants (see pages 11-12 for full grant details)	65,524	71,000
Charity income 2023 totals	**85,968**	**76,150**
Resources Expended		
Expenditure for raising funds		
Direct fundraising expenses	958	233
Allocation of general overhead expenses	2052	1266
Direct Charitable Expenditure		
Visiting and Befriending, Information and Signposting	6,300	6,300
Staff Payroll	73,316	73,545
IT Support/Laptops/Broadband etc.	2,589	2,628
Accountancy fees	686	594
Training	55	150
Website/ Marketing development	302	194
Governance	694	404
Sundry Expense	396	380
Bank Charges	84	25
Depreciation on office equipment	585	561
Total Direct Charitable Expense	**88,018**	**86,279**
Surplus for the year to transfer to reserves	**-2050**	**-10,129**

Age Concern Mole Valley		
Balance Sheet	**£**	**£**
As at 31.03.2023	**2023**	**2022**
Fixed Assets		
Tangible assets	1,073	1,658
Investments	-	-
Current Assets		
Debtor	-	-
Cash at bank	48,909	50,253
	49,982	51,911
Current Liability		
Creditors:		
Amounts falling due within one year		
PAYE		
Pension	59	
Accruals	62	-
	121	-
Net current assets	49,861	51,911
Total assets less current liabilities	49,861	51,911
		-
Long term loans	-	-
Net Assets	**49,861**	**51,911**
Designated funds	65,000	65,000
Unrestricted funds	(15,139)	(13,089)
Restricted funds	-	
Total Charity funds	**49,861**	**51,911**

Client Approval Certificate

I approve these accounts and confirm that I have made available all relevant records and information for their preparation.

Signed:

Dated 23-11-23

Age Concern Mole Valley

Notes to the Accounts For the year ended 31 March 2023

Notes to the Financial Statements as at 31 March 2023

1. Basis of Preparation

The financial statements have been prepared under the historic cost convention, following the recommendations of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in 2014 covering charities with a year end after January 2015.

2. Accounting Policies

a) Income

All income is accounted for on an accrual basis, except for voluntary donations, which are taken into account when received Grants are recognised in full during the year that they are received Incoming receipts from tax reclaims are included in the SOFA at the same time as the gift to which they relate.

b) Fixed Assets

Fixed assets are stated at cost and depreciation is provided at rates calculated to write off the cost of each asset over its expected useful life Computer equipment and office equipment 25% straight line basis It is the Charity's policy to capitalise fixed assets that are above a de minimis level of £500.

c) Resources expended

Resources are accounted for on an accruals basis. Expenditure is appointed to cost categories based on the amount attributable during the year, including the cost of generating funds, charitable activities. Governance costs include legal costs and Trustee meetings only

d) Recognition of liabilities

These financial statements recognise all liabilities that the charity has responsibility for. The charity is not aware of any contingent liabilities.

Age Concern Mole Valley

Notes to the Accounts For the year ended 31 March 2022

3. Staff

The charity has been well represented by Sonia Hubbard, Andrea Kelley, Julia Gallagher and June Mills throughout the year.

4. Tangible Fixed Assets	31.03.2023	31.03.2022
Cost	10719	9545
Addition	-	1174
Accumulated Depreciation	-9061	-8500
Depreciation Charge	-585	-561
	1073	1658

5. Other Creditors

	31.03.2023
	59
Pensions Fund	62
Accruals	

6. Lease

During the year, the Charity took one office space at the Point in Dorking.

This lease continues until February 2023 at an annual cost of £6,300, but with a general break clause after 3 months' notice.

7. Commitments

There are no other commitments not recorded in the financial statements.

AGE CONCERN MOLE VALLEY

England & Wales - Charity number 1111678

Accounts

AGE Concern Mole Valley

Improving the lives of older people

Making later life a fulfilling and enjoyable experience

ANNUAL REPORT

2021-2022

Registered Charity No 1111678
Registered Company No 5409543

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LEGAL & ADMINISTRATION

Registered Charity Number: 1111678
(England and Wales)

Registered Company Number: 5409543
(England and Wales)

Registered Address
The Point, Mayflower Centre, Lyons Court, Dorking, Surrey RH4 1AB

Executive Committee

Chair	Sally Dubery
Trustee	Pat Clare
Trustee	Elaine Machin
Trustee	Dennis Wickham

All members of the Executive Committee are Trustees and Volunteers, and we thank you for your support.

Staff

Chief Executive Officer	Sonia Hubbard
Information & Signposting Officer	Julia Gallagher
Volunteer Coordinator	Andrea Kelley
Administrative Assistant	June Mills

Bankers
H S B C, 18 North Street, Leatherhead, Surrey KT22 7AR

Independent Examiner
Andrew Wheeler, Taxsense Accountants, 203 West Street, Fareham, Hants PO16 0EN

REPORT OF THE TRUSTEES FOR THE 12 MONTHS TO 31 MARCH 2022

The Trustees present their report with the financial statements of the charity for the year ended 31 March 2022.

The Trustees have adopted the provisions of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in January 2015.

Structure, Governance and Management

The company is registered as a charitable company limited by guarantee and was set up by Memorandum and Articles of Association. Age Concern Mole Valley is run by an Executive Committee of Trustees. The Committee meets every 2 months.

The charity has a strategic business plan for 2016-22 in place, which underpins the direction taken. However, the vision and mission of the charity and taking into account the many challenges and opportunities, means the charity also needs to be flexible and ready to respond to environmental changes.

Vision and Mission

The vision of Age Concern Mole Valley is all encompassing and clear, 'Improving the lives of older people' and the mission is 'Making later life a fulfilling and enjoyable experience'. These both underpin all that the charity aims to accomplish in the future.

Age Concern Mole Valley will continue to support older people over 50, but will focus service delivery on people who have reached the statutory pension age and above.

Values and Strategic Aims

The key strategic aims of focus that underpin the charity's direction are as follows:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Advice Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

Each of these key aims has underlying objectives and outcomes, so that Age Concern Mole Valley can focus on achieving its vision of 'improving the lives of older people' and its mission of 'Making later life a fulfilling and enjoyable experience'.

Activities

In relation to the Covid 19 pandemic in March 2021 we put together an overall service delivery plan, which ran from March 2021 until the end of the year. The focus was on returning to face-to-face services after the pandemic. In February 2021, the Government set out its roadmap, a step-by-step plan to ease restrictions in England cautiously whilst managing the risks of Covid 19, which we incorporated into our service delivery plan. The charity has continued to be very active throughout the year. We continued to provide the Age Concern Mole Valley 'Local Community Support Programme', which encompasses, Home Visiting, Information & Signposting and Telephone Befriending/ Befriending, Social Events, IT/Digital Sessions and Will Writing Clinics over this period.

Local Community Support Programme

The Government introduced their steps and eased limits on social contact, enabling the public to make informed personal decisions. We felt that it was important for our clients and the people we support to consider the risks for themselves, taking into account whether they and those they meet have been vaccinated or whether or not they wanted to socially distance/wear a mask. When we opened up the Home Visiting and Befriending Services to face-to-face visits, we did various risk analyses with the client and the volunteer, with a focus on both of their preferences in relation to visiting. It was a person-centred approach, and all clients and volunteers were asked their preferences regarding home visiting. We also developed Key Visiting Guidelines for Volunteers, Clients and Staff, with a focus on staying as safe as possible. In April 2021 we offered our volunteers entry to the developing vaccination programme, if they wanted to take that as an option via the County Council.

Home Visiting

Julia Gallagher, our Information & Signposting Officer has continued to support clients throughout the pandemic via telephone support. The initial face-to-face home visit was reintroduced in May/June 2021 where she was able to identify the specific needs of the individual, with Information & Signposting to services that can help improve day-to-day circumstances, e.g., home help support. We aim to support people to be able to live independently and decide on the services they want to employ but also to encourage community engagement.

Befriending/Telephone Befriending

The Befriending and Telephone Befriending project is around addressing loneliness and isolation by organising a volunteer to regularly telephone/visit the older person on a weekly basis to provide a listening ear. Our Volunteer Coordinator, Andrea facilitates the valuable match-making process with the volunteer and the client, as this service's journey develops. In May/June 2021, we slowly started a return to face-to-face Befriending, which continued to the end of the year. Many of our Volunteer Befrienders had become telephone befrienders, supporting their clients with a weekly chat through the pandemic.

Some of these calls were a lifeline for isolated people in 2020. It was a huge step forward for our volunteers to start to visit again as we came out of the pandemic in May 2021.

Andrea Kelley, our Volunteer Coordinator had continued to support Volunteers and Clients via telephone and virtual meetings throughout the pandemic. This year she slowly started to return to a face-to-face induction/recruitment process with new volunteers and client visits.

Information & Signposting Service – June Mills our Administrative Assistant has continued to give help and guidance from our office on a wide range of issues to older people living in the Mole Valley area, and to members of their families, plus the general public.

The charity's **Information Technology (IT)/Digital Training sessions** did stop in March 2020 because of COVID 19. In October 2021 we restarted the sessions in both Leatherhead at the Fairfield Centre and at the Point in Dorking.

Will Writing Clinics – as we came out of the pandemic, we held our first Will Writing clinic on 8th July 2021 and then continued to provide monthly clinics at the Meaby & Co offices.

Tai Chi Class – in May 2021 we made the decision to not to resume the Tai Chi classes due to staff capacity. We would like to thank our Volunteers and Kai Cheong, the instructor, for their support.

Events - we did not hold any events during this period, but we aim to start these again in the future. A lot of charities have been affected by Covid 19 and how they deliver services.

Governance – over this period the CEO has continued to review the many policies and procedures required to manage the charity legally, safely and effectively. Also, various risk analyses have been key to the development of services throughout this period. The Charity's Trustees have met on Zoom over these 12 months. General Data Protection Regulation - we continued to have this as an area of focus at each Executive Committee meeting.

Information Technology (IT) Developments – over this period we have continued to develop our cloud-based database system 'Charitylog', which enables staff to work from 'the cloud', on every aspect of our operational activities from any location that has Wi-Fi, which was fully appreciated with the move for most staff to hybrid working. We have also continued to develop our website: www.ageconcernmolevalley.org.uk.

Partnership working – we have continued to attend various partnership meetings over this period via Zoom/Teams and attend informative events/conferences to remain knowledgeable regarding the development and environmental factors affecting older people.

In relation to these activities and developments over the last year, the following section gives details of what the charity has achieved in another challenging year.

Achievements and Performance – 2021 to 2022

The following were our key strategic focus over this period and throughout the Covid 19 pandemic, along with the Business Plan's objectives:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

In this financial year Age Concern Mole Valley has restarted all its main face-to-face services and supported older people with over 5000 activities and continued to develop core projects, such as, the Befriending and Visiting Service, the Information & Signposting Service, and restarted our IT/Digital Sessions in Dorking and Leatherhead. Here are some of the key achievements in such a challenging year as we emerged from the Covid 19 pandemic.

Dorking Office - our office in Dorking has been open 4 days per week and staffed by June Mills, our Administrative Assistant. We were open to the public for information & signposting and for news and booking of Age Concern Mole Valley services throughout the year.

The Age Concern Mole Valley 'Local Community Support Programme' encompasses: Home Visiting, Information & Signposting, Telephone Befriending/Befriending, Social Events, IT/Digital Sessions and Will Writing Clinics:

The Information and Signposting Service has continued to develop extensively over this period, with Julia Gallagher our Information & Signposting Officer and June Mills our Administrative Assistant, adding new and updating records on a regular basis. In previous years, e.g., 2015/16 we noted over 450 enquiries covering various themes, from IT/Digital Sessions, befriending to needing gardening and home support and in 2019/20 we noted over 600 general enquiries. Last year we noted 850 activities, including over 500 individual enquiries. This year we have added over 50 new organisations and updated over 350 organisations and the service has noted over **950 activities, including over 400 individual enquiries,** most of which will often be signposting to more than one service, as we like to give people choice. The development and updating of this invaluable resource is always an ongoing action.

Home Visiting has returned to face-to-face meetings with Julia Gallagher visiting old and new clients in their home. Over this period we conducted various risk analyses with the clients, with a focus on their preferences in relation to visiting. Our work aims to support older people to live independently for as long as possible, through effective Information & Signposting. The outcome of reduced loneliness and isolation does improve a person's health and wellbeing, a healthier older person can then live safely at home with independence. When the client is ready, we then move onto the Befriending service and make a match with a volunteer. This process is important for both people, especially around finding the right match, it requires listening skills and a great deal of perception, so that the service works for both parties, and we achieve our outcomes of reduced loneliness and isolation.

The **Befriending/Telephone Befriending Service** continues to be a vital contribution to reducing loneliness and isolation and increasing community cohesion with local communities coming together, plus improving the health and wellbeing of the older person and in some cases the volunteer. The aim is to enable the older person to regain social and interpersonal skills which may have become less due to the loss of a loved one, friends, or a close relative moving out of the area.

In mid-March 2020, with the onset of the Coronavirus we started to develop our face-to-face Befriending Service to that of a Telephone Befriending Service. In 2021 as part of our service delivery plan we slowly returned to face-to-face visiting, after various risk analyses with the client and the volunteer, with a focus on both of their visiting preferences. In relation to our person-centred approach, Andrea Kelly, our Volunteer Coordinator, spent considerable and valuable time gathering our volunteers' and clients' views and preferences to get our service delivery back on track, which was achieved.

We would not have been able to assist our clients without our dedicated staff and volunteers. The return to home visits were a lifeline for many of our clients as we emerged from the pandemic. Here are some examples from both the client and the volunteer of how this vital service 'improves older peoples' lives':

> *"The befriender role far exceeded my expectations, such an important and vital role. John and I got on so well that my visits were normally 2.5 to 3 hours." Volunteer*
>
> *"My befriender has made such a difference to me and is a really important part of my life now. I always look forward to our meetings and feel better after I've seen her." Client*
>
> *"I am really enjoying Hannah's visits and calls, we get on so well and it's nice to have something to look forward to." Client*

"I really enjoy Anna's visits, we get on really well and have become good friends, we do our knitting together and look at photos and talk about all sorts. I took an instant liking to her at the very first meeting." Client

"I have really enjoyed my weekly telephone calls with Brenda. We get on so well and have so many common interests despite never meeting. It was a great match. I would still like to call her even though she is moving away as we have become really good friends." Volunteer

"I am extremely grateful to Age Concern MV for introducing me to my befriender. Peter has made an incredible difference to my life." Client

"The visits to Glenda are going well for me. I have been extremely lucky to have a client who has become a friend to me." Volunteer

"I am delighted with how the visits are going with my befriender. It is so nice to have someone to natter with and have something in the diary each week to look forward to. You have found me such a nice person. Thank you." Client

"I am very fortunate in finding a client who has also become a friend." Volunteer

"It was worth the wait for the right person. My befriender is so kind and we get on so well despite us only knowing each other for a short time. We can talk for England." Client

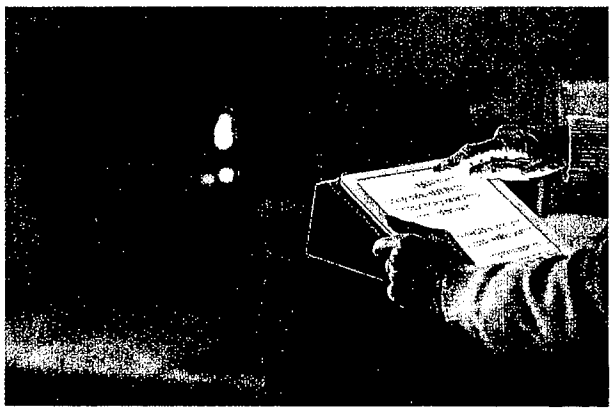
"I love my job but it is not very rewarding on a personal note, as a volunteer befriender its lovely to do something each week that makes a real difference to someone's life." Volunteer

"I see my client once a week for a couple of hours, when I visit her face lights up and eyes twinkle. We have become really good friends and it has certainly made a difference to her life." Volunteer

"I can't thank you enough, you made an excellent choice and couldn't have matched me with anyone better." Client

Over this time period we had 13 new Volunteer Befrienders/Telephone Befrienders, making a total of 71, a slight increase on the previous year. These volunteers provide an invaluable service to lonely and isolated older people. This is highly appreciated by Age Concern Mole Valley and the person they are visiting.

Information Technology (IT)/Digital Sessions – these sessions are for people over 50 years old and were restarted in October 2021 in both Dorking and Leatherhead. These were previously on hold due to the Covid 19 pandemic. During this period, we have also supported previous 'learners' over the telephone. In terms of face-to-face IT/Digital sessions - we held 4 courses, with each course running for 6 weeks and in total we have held over 150 learner sessions.



We have had '8 volunteers', which support these sessions on a regular basis and without their dedication we would not be able to support so many 'learner sessions'. We would like to thank them all for their ongoing commitment to Age Concern Mole Valley, for their never-ending patience and for sharing their knowledge. Some of our volunteers have said what they most enjoy about their volunteering:

> *"Watching peoples' delight as they master IT skills and realise how much fun and useful things there are to discover." Volunteer*

> *"It's so nice to hear that our help - however big or small, makes such a difference to those receiving it." Volunteer*

Here is some feedback from the 'learners' of how these sessions have 'improved their lives'.

> *"I'd definitely recommend the classes to older people who might be a bit nervous around new technology. With lots of things being online only nowadays, it offers a whole new lease of life, and you'll never look back".*

> *"I really appreciated advance preparation by my volunteer and her patience when I talk too much".*

> *"Use of Zoom and Free time enables me to continue as contact information & advocate for mental health and disability residents in Mole Valley, also connecting with family".*

> *"It has definitely improved my confidence and knowledge of what the computer can do for me."*

> *"Extremely helpful and patient, so helpful for all older people".*

> *"My tutor was never out of his depth. I crossed off another thing on my life's to-do list".*

> *"My volunteer tutor has been very patient, I'm thrilled with what I've learnt".*

> *"Extremely helpful and friendly course taking into account mature ages".*

Volunteers' Week, over this period we have had a total of 81 volunteers and as we slowly emerged from the Covid 19 pandemic sadly we were unable to hold any celebratory events. However, we have thanked our wonderful volunteers for their commitment to Age Concern Mole Valley.

We have continued to recruit new volunteers for the befriending service. We need more and will continue to look to the local community for volunteers to support in delivering our services.

We have had 40 matches and re-matches across 34 volunteers with 13 new befriending/ telephone befriender clients, so in total we had 70 Volunteer Befrienders over this period. We had 8 volunteers that helped deliver our Information Technology related learning support. Age Concern Mole Valley is extremely grateful for the unstinting efforts of all its volunteers who are involved in service provision, and they are highly valued for their support. Without our volunteers we would not be able to achieve our aims and objectives and 'Improve the lives of older people' in Mole Valley.

Funding Applications - in 2021/22 one of the key areas of focus by the CEO was to secure funding contributions to support the charity and we want to give thanks for that invaluable support, as follows:

The Allen Lane Foundation – awarded a grant of £4,000 for core costs and it was paid in March 2021 for the April 2021-22 financial year. We thank the foundation for this grant and for giving Age Concern Mole Valley a grant spread over 2 years.

National Lottery Community Fund - in 2021 we received the great news of 3 years' funding. The first £15,000 grant was restricted funds, and the reference is "the National Lottery Community Fund" and the programme name is "RC London and South East Region". We thank the Community Fund for believing in all our work and supporting Age Concern Mole Valley for 3 years.

Community Foundation for Surrey – we thank the CFS for their ongoing support and the hard work, they do on behalf of the voluntary and community sector in Surrey. We had a £20,000 grant and a £10,000 grant which went towards the charity's core costs, specifically our Local Community Support Programme. The needs of many of the older people that Age Concern Mole Valley supports will relate to reducing their loneliness and isolation in the community, with the added outcome of improved health and wellbeing. The Age Concern Mole Valley 'Local Community Support Programme' encompasses home visiting, information & signposting, Telephone Befriending and Befriending, etc.

Garfield Weston Foundation – this £10,000 grant went towards all the charity's running costs and services, particularly our 'Local Community Support Programme'. The Garfield Weston Foundation supports small community groups, to large national institutions. The Foundation's aim is to support organisations that have effective solutions to helping those most in need. Thank you for your contribution and we value the continuing support.

Home Instead Charities – we received a £1500 grant towards our 'Local Community Support Programme'. We thank Home Instead Charities for the grant and the support of our programme.

Mole Valley District Council – this £1,000 grant went towards the purchase of 2 new laptops. We thank you for your contribution.

The Henry Smith Foundation – this £10,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme'. Henry Smith aims to use their resources to help people and communities at a time of need and to bring about positive change. We thank you for your contribution and for supporting Age Concern Mole Valley for 2 years.

The Sir Jules Thorn Charitable trust kindly gave a £1500 donation to Age Concern Mole Valley, and we thank them for their contribution.

We also received £333 from the **Dorking Waitrose**. Waitrose was given the theme of "Supporting Those in Need at Christmas" and so gave this valuable contribution to Age Concern Mole Valley, many thanks for the local support.

We have remained in close contact with Age UK nationally and we are pleased to remain formally as a "friend". We have a strong supportive relationship with Age Concern Epsom & Ewell, Age Concern Banstead and Age Concern Merstham, Redhill & Reigate. We also retain close relations with other local charities, which provide for the needs of older people, and are grateful to Central Surrey Voluntary Action for their continued support regarding volunteer recruitment.

Will Writing – in relation to these clinics we resumed a face-to-face service in July 2021 at Meaby & Co's offices. This is a valuable service, and we work in partnership with **Meaby & Co Solicitors** - we thank Esther Janalli-Brown, solicitor at Meaby & Co for her continued support.

The future has many challenges for charities such as, Age Concern Mole Valley. The main area of focus will be a sustainable fundraising programme for the future and also the recruitment of more volunteers to support all that we deliver.

The Future

Age Concern Mole Valley will continue to develop and build on the invaluable work it has achieved in previous years. Our vision is to 'improve the lives of older people', and as we end this financial year and go into the next, we continue to face the challenge of fundraising and the recruitment of new volunteers. We will not change our key aims which underpin all our future plans to continue our invaluable services:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

We have secured funding from the 'The National Lottery Community Fund' for the following 2 years, which is good start to our 2023/24 fundraising plan. There are several funders that have supported Age Concern Mole Valley over the last 2 years, and we hope they will continue to be supportive, so that we can build a sustainable fundraising programme for the future.

Age Concern Mole Valley has been nominated as the charity for 'Westival' a music festival in Dorking, which is planned for April 2023, a fantastic opportunity to raise funds for our charity.

We will continue to deliver the Age Concern Mole Valley 'Local Community Support Programme' which encompasses home visiting, a level of information & signposting, befriending, social events, IT/Digital Sessions and Will Writing clinics. The programme is ongoing, it aims to reduce loneliness and social isolation whilst prolonging independence and enabling older people to remain at home with the appropriate support services. All services that are part of the programme have now returned to face-to-face and will continue in that way unless there are any new developments to government guidance regarding the Coronavirus.

We will continue to support our elderly clients with additional home visits to revisit their needs over time and to see if any additional information and signposting would enhance their quality of life. In relation to the Befriending service – we will still be flexible and person-centred as every volunteer and client and their particular circumstances will be different. With this in mind we plan to still continue with a form of a Covid 19 risk analysis framework for both clients and volunteers.

In relation to **General Data Protection Regulation (GDPR),** the charity will continue to review processes throughout the year.

Information and Signposting – this will continue to be an area of development and updating in 2022/23 with a review of the organisations we added throughout the Coronavirus pandemic. This will be essential, so that we can signpost people to local services as they emerge and develop. We will continue to build on the current service, revisiting contacts and double checking our information, so that we provide a useful information portal for those looking for services to support older people.

Information Technology (IT)/Digital Learning Sessions – the valuable IT/Digital Learning sessions will continue in 2022 in both Leatherhead and Dorking. We will use a similar approach as with the Befriending Service, person-centred as every volunteer and learner will have their own preferences regarding their learning approach. We will also aim to recruit additional volunteers to support these sessions, so we can in turn help more 'learners' discover the benefits of information technology, especially around connecting them to family and friends.

Volunteers' Week – we have several face-to-face events planned in June 2022 to celebrate Volunteers' Week. There will be 3 summer events, where we will take time to say a 'big thank you' to our volunteers' for all their support, especially throughout the Coronavirus pandemic. We plan to also hold a Christmas event for our volunteers in December. A challenge for next year is Volunteer Recruitment – it has been recognised that since the Coronavirus pandemic there is a general shortage of volunteers. We like many charities, are finding it hard to recruit more volunteers, and we have lots of lonely/isolated older people that would like a Befriender to visit, so it will be a priority.

Partnership Working – we will continue to contribute and work in partnership with a network of local organisations that support older people across Mole Valley, facilitated by Mole Valley District Council.

Corporate Relationships – we plan to continue to work with **CGI** and **ExxonMobil,** Leatherhead and **Uňůň** in Dorking regarding their Employee Volunteering schemes and how we can work in partnership in the future.

Will Writing – we plan to continue this valuable service and work in partnership with **Meaby & Co Solicitors** in early 2022/23. We thank Esther Janalli-Brown, solicitor at Meaby & Co for her continued support.

Events/Café Project at the Point – we are exploring a joint venture with Central Surrey Voluntary Action, which would bring our clients to the Café in the Point for some fun, cake and company.

It has been another memorable and eventful year, as we emerged from the Coronavirus pandemic. A huge 'thank you' to the staff team, Andrea, Julia and June for all their hard work this year. Our vision 'improving the lives of older people' is as always central to all that we deliver and will develop in the future.

Sonia Hubbard, Chief Executive Officer

Message from the Chairman

The Voluntary, Community and Faith Sector make a huge contribution to the lives of people in Mole Valley, providing a range of services and support to the community. Age Concern Mole Valley will continue to provide and build on its invaluable support services to older people, so in turn their service delivery will impact and make a difference to the community in Mole Valley, and 'improving the lives of older people'.

It was a difficult year for us all as we emerged out of the Covid 19 pandemic and returned to face-to-face service delivery. We as a charity continue to be very person centred regarding peoples' preferences. I would like to thank all my Trustee colleagues and all our wonderful volunteers for their support of our clients and 'learners', plus Sonia Hubbard (CEO) and the staff team for their continued hard work in support of the charity and their strong commitment to our vision through what were 'unprecedented times' over the last 2 years.

Sally Dubery
Chairman

Financial Review

Income for the period totalled £76,150 including several grants from charitable trusts and foundations, together with donations from individuals and local organisations.

Expenditure was maintained at a similar level to the previous year £86,279.

This results in an overall deficit of £10,128.
At the end of the year, the charity has designated reserves of £30,000, which are 3 months running costs and form the charity's reserves policy.

Reserves Policy and Risk Management
The Trustees have carefully considered the forecast of income and expenditure for the year 2021/22 and have concluded that it is appropriate to utilise the reserves in maintaining the resources available to the organisation to enable it to continue its activities in key areas.

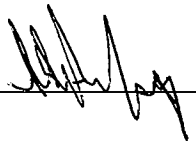
Trustees' Responsibilities in relation to the Financial Statements
Charity law requires the Trustees to prepare financial statements that give a true and fair view of the state of affairs of the charity at the end of each financial year and of its surplus or deficit for the financial year. In doing so, the Trustees are required to:

- Select suitable accounting policies and apply them consistently
- Make judgements and estimates that are reasonable and prudent
- Prepare the financial statements on a going concern basis unless it is inappropriate to assume that the charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the new FRS 102 (SOFA) and the Charities Act 2011.

The Trustees are also responsible for the safeguarding of the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Reference and Administration
Legal and reference information, which is shown after the contents page, forms part of this report. The financial statements comply with the current statutory requirements, the charity's governing document and the SORP 'Accounting and Reporting by Charities'.

On behalf of the Trustees 

Independent examiner's report on the accounts

Section A — **Independent Examiner's Report**

Report to the trustees/ members of Age Concern Mole Valley

On accounts for the year ended 31st March 2022 **Charity no (if any)** 1111678

Set out on pages 1 to 4

Respective responsibilities of trustees and examiner The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement In connection with my examination, no matter has come to my attention

1. which gives me reasonable cause to believe that in, any material respect, the requirements:
   - to keep accounting records in accordance with section 130 of the Charities Act; and
   - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act

   have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed: **Date:** 9/8/22

Name: Andrew Wheeler

Relevant professional qualification(s) or body (if any): ACCA

Address: Taxsense Accountants
203 West Street
Fareham
Hampshire

org

Age Concern Mole Valley	1111678

Receipts and payments accounts

CHARITY COMMISSION FOR ENGLAND AND WALES

For the period from	1/4/2021	To	31/03/2022

CC16a

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Charitable Trusts	71,000	-	-	71,000	113,050
Services provided	21	-	-	21	946
Donation & Legacies	5,129	-	-	5,129	2,472
Interest Received		-	-		
Sub total*(Gross income for AR)*	76,150	-	-	76,150	116,468
A2 Asset and investment sales, (see table).					
Sub total		-	-		-
Total receipts	76,150	-	-	76,150	116,468
A3 Payments					
Expenditure on raising funds	1,498	-	-	1,498	1,214
Expenditure on Charitable Activities	84,780	-	-	84,780	82,768
Sub total	86,279	-	-	86,279	83,982

A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	86,279	-	-	86,279	83,982
Net of receipts/(payments)	-10,128	-	-	-10,128	32,486
A5 Transfers between funds		-	-		
A6 Cash funds last year end	60, 381	-	-	60, 381	
Cash funds this year end	50,253	-	-	50,253	32,486

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	50,253	-	-
			-	-
			-	-
	Total cash funds	50,253	-	-
	(agree balances with receipts and payments account(s))			

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
Tangible Assets	Unrestricted	9423	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Sally Dubery	15.11.22
	Elaine Machin	15.11.22

Age Concern Mole Valley

For the Year Ended 31 March 2022

Charity Number 1111678

Note 1 2022 Income and Expenditure Funds

Income and Endowments	**2022**	**2021**
	£	**£**
Receipts from Events/Gift Aid/Royalties/Standing Orders	21	946
Computer donations	365	1,250
General donations	4,764	1,222
Grants (see pages 11-12 for full grant details)	71,000	113,050
Interest received	0	0
Charity income 2022 totals	**76,150**	**116,468**
Resources Expended		
Expenditure for raising funds		
Direct fundraising expenses	233	71
Allocation of general overhead expenses	1266	1143
Direct Charitable Expenditure		
Visiting and Befriending, Information and Signposting	6,300	4,800
Staff Payroll	73,545	74,045
IT Support/Laptops/Broadband etc.	2,628	2,262
Accountancy fees	594	594
Training	150	
Website/ Marketing development	194	242
Governance	404	368
Sundry Expense	380	335
Bank Charges	25	0
Depreciation on office equipment	561	121.25
Total Direct Charitable Expense	**86,279**	**83,982**
Surplus for the year to transfer to reserves	**-10,128**	**32,486**

Age Concern Mole Valley

Balance Sheet	**£**	**£**
As at 31.03.2021	**2022**	**2021**
Fixed Assets		
Tangible assets	1,658	1,044
Investments	-	-
Current Assets		
Debtor	-	-
Cash at bank	50,253	60,995
	51,911	62,039
Current Liability		
Creditors:		
Amounts falling due within one year		
PAYE	-	
Accruals	-	-
	-	-
Net current assets	51,911	62,039
Total assets less current liabilities	51,911	62,039
		-
Long term loans	-	-
Net Assets	**51,911**	**62,039**
Designated funds	65,000	65,000
Unrestricted funds	(13,089)	(2,961)
Restricted funds	-	
Total Charity funds	**51,911**	**62,039**

Client Approval Certificate

I approve these accounts and confirm that I have made available all relevant records and information for their preparation.

Signed:

Dated 15.11.2022.

Age Concern Mole Valley

Notes to the Accounts For the year ended 31 March 2022

Notes to the Financial Statements as at 31 March 2022

1. Basis of Preparation

The financial statements have been prepared under the historic cost convention, following the recommendations of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in 2014 covering charities with a year end after January 2015.

2. Accounting Policies

a) Income

All income is accounted for on an accrual basis, except for voluntary donations, which are taken into account when received Grants are recognised in full during the year that they are received Incoming receipts from tax reclaims are included in the SOFA at the same time as the gift to which they relate.

b) Fixed Assets

Fixed assets are stated at cost and depreciation is provided at rates calculated to write off the cost of each asset over its expected useful life Computer equipment and office equipment 25% straight line basis It is the Charity's policy to capitalise fixed assets that are above a de minimis level of £500.

c) Resources expended

Resources are accounted for on an accruals basis. Expenditure is appointed to cost categories based on the amount attributable during the year, including the cost of generating funds, charitable activities. Governance costs include legal costs and Trustee meetings only

d) Recognition of liabilities

These financial statements recognise all liabilities that the charity has responsibility for. The charity is not aware of any contingent liabilities.

Age Concern Mole Valley

Notes to the Accounts For the year ended 31 March 2022

3. Staff

The charity has been well represented by Sonia Hubbard, Andrea Kelley, Julia Gallagher and June Mills throughout the year.

4. Tangible Fixed Assets	31.03.2022	31.03.2021
Cost	8379	8379
Addition	1174	1165.62
Accumulated Depreciation	-8379	-8379
Depreciation Charge	-561	-121.25
	614	1044

5. Lease

During the year, the Charity took one office space at the Point in Dorking.

This lease continues until February 2023 at an annual cost of £6,300, but with a general break clause after 3 months' notice.

6. Commitments

There are no other commitments not recorded in the financial statements.

AGE CONCERN MOLE VALLEY

England & Wales - Charity number 1111678

Accounts

AGE Concern Mole Valley

Improving the lives of older people

Making later life a fulfilling and enjoyable experience

ANNUAL REPORT

2020-2021

Registered Charity No 1111678
Registered Company No 5409543

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23	Balance Sheet
24-25	Notes forming part of the Financial Statements

LEGAL & ADMINISTRATION

Registered Charity Number: 1111678
(England and Wales)

Registered Company Number: 5409543
(England and Wales)

Registered Address
The Point, Mayflower Centre, Lyons Court, Dorking, Surrey RH4 1AB

Executive Committee

Chair	Sally Dubery
Trustee	Pat Clare
Trustee	Elaine Machin
Trustee	Dennis Wickham

All members of the Executive Committee are Trustees and Volunteers, and we thank you for your support.

Staff

Chief Executive Officer	Sonia Hubbard
Information & Signposting Officer	Julia Gallagher
Volunteer Coordinator	Andrea Kelley
Administrative Assistant	June Mills

Bankers
H S B C, 18 North Street, Leatherhead, Surrey KT22 7AR

Independent Examiner
Andrew Wheeler, Taxsense Accountants, 203 West Street, Fareham, Hants PO16 0EN

REPORT OF THE TRUSTEES FOR THE 12 MONTHS TO 31 MARCH 2021

The Trustees present their report with the financial statements of the charity for the year ended 31 March 2021.

The Trustees have adopted the provisions of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in January 2015.

Structure, Governance and Management

The company is registered as a charitable company limited by guarantee and was set up by Memorandum and Articles of Association. Age Concern Mole Valley is run by an Executive Committee of Trustees. The Committee meets every 2 months.

The charity has a strategic business plan for 2016-22 in place, which underpins the direction taken. However, the vision and mission of the charity and taking into account the many challenges and opportunities, means the charity also needs to be flexible and ready to respond to environmental changes.

The following report covers the many areas that were agreed in 2015 in light of the strategic business plan, 2016-22.

Vision and Mission

The vision of Age Concern Mole Valley is all encompassing and clear, 'Improving the lives of older people' and the mission is 'Making later life a fulfilling and enjoyable experience'. These both underpin all that the charity aims to accomplish in the future.

Age Concern Mole Valley will continue to support older people over 50, but will focus service delivery on people who have reached the statutory pension age and above.

Values and Strategic Aims

The strategic Business Plan 2016-22 was put in place in April 2016 and the key aims of focus that emerged and underpin the charity's direction are as follows:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Advice Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**

- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

Each of these key aims has underlying objectives and outcomes, so that Age Concern Mole Valley can focus on achieving its vision of 'improving the lives of older people' and its mission of 'Making later life a fulfilling and enjoyable experience'.

Activities

In March/April 2020 the Coronavirus pandemic became a reality and Age Concern Mole Valley's staff moved quickly and we ceased all face-to-face services. After following the government guidance a complete risk analysis was conducted and it was agreed that 3 staff would work from home with 2 mobile work phones/laptops, one for Andrea Kelley to support Volunteering and one for Julia Gallagher to support Information and Signposting. The main office was closed to the public and June Mills our Administrative Assistant covered a help and Information & Signposting line from 9.00-12.00 pm (Mon-Fri) and then the other 2 mobiles were in place for support in the afternoons. We had an email helpline in place as well. The charity's information technology systems are cloud based, so all staff could access these and work from home accordingly. Meetings were mainly held virtually throughout the year by staff, volunteers and trustees.

The charity has continued to be very active throughout the year, despite the pandemic.

The charity has continued to provide the Age Concern Mole Valley 'Local Community Support Programme', which encompasses, Information & Signposting and now Telephone Befriending, unfortunately, home visiting and social events were put on hold following government guidance. We reengineered our services, so that we could continue to support our elderly clients by telephone to offer reassurance and to check on their welfare. Many of our normally face-to-face volunteer befrienders became telephone befrienders to help our clients through the challenging times of the pandemic.

In relation to the **Telephone Befriending service,** all staff worked hard to set this emerging service up to support our elderly clients. Andrea Kelley our Volunteer Coordinator had virtual meetings with new volunteers and conducted a thorough induction/recruitment process. We have recruited new 'Telephone Befrienders' with the view that they will eventually visit the client, when they are able. All our Befriending guidelines/promotional materials have been modified to fit Telephone Befriending.

Julia Gallagher, our Information & Signposting Officer has continued to support clients. The initial home visit was on hold, but via a telephone call she has identified the specific needs of the individual, with Information & Signposting to services that can help improve day-to-day circumstances, e.g., Covid home shopping services. We aim to support people to be able to live independently and decide on the services they want to employ but also to encourage community engagement. Once we have met those initial needs of the person, we will move onto telephone befriending. The Befriending and Telephone Befriending project is around addressing loneliness and isolation by organising a volunteer to regularly telephone/visit the

older person on a weekly basis to provide a listening ear. Our Volunteer Coordinator, Andrea facilitates the valuable match-making process with the volunteer and the client, as this service's journey develops.

Information & Signposting Service – June Mills our Administrative Assistant has continued to give help and guidance from our office on a wide range of issues to older people living in the Mole Valley area, and to members of their families, plus the general public. The charity has remained in close contact with Age UK nationally and we are pleased to remain formally as a "friend". We have a strong supportive relationship with Age Concern Epsom & Ewell, Age Concern Banstead and Age Concern Merstham, Redhill & Reigate. We also retain close relations with other local charities, which provide for the needs of older people, and are grateful to Central Surrey Voluntary Action for their continued support regarding volunteer recruitment.

The charity's **Information Technology (IT)/Computer Training sessions** did stop in March 2020. However, we offered a remote IT service via the telephone throughout the year. Many of our IT Volunteers called 'learners' from previous training sessions to determine if they needed any IT support at home.

Information Technology (IT)/Computer Drop in Leatherhead was put on hold as the Fairfield Centre in Leatherhead closed from March 2020.

Events/Tai Chi Class – all events and Tai Chi classes were postponed throughout this year due to government guidance regarding face-to-face activities.

Governance – over this period the CEO has continued to review the many policies and procedures required to manage the charity legally, safely and effectively. Also, various risk analyses have been key to the development of services throughout this period. The Charity's Trustees have met on Zoom over these 12 months.

Information Technology (IT) Developments – over this period we have continued to develop our cloud-based database system 'Charitylog', which enables staff to work from 'the cloud', on every aspect of our operational activities from any location that has Wi-Fi. This was also a year where the move to Office 365 in the previous year was fully appreciated with the move for most staff to home working.

We have also continued to develop our website: www.ageconcernmolevalley.org.uk.

Partnership working – we have continued to attend various partnership meetings over this period via Zoom/Teams and attend informative events/conferences to remain knowledgeable regarding the development and environmental factors affecting older people.

In relation to these activities and developments over the last year, the following section gives details of what the charity has achieved in a very challenging year.

Achievements and Performance – 2020 to 2021

In March 2020 when the country went into lock down, we as a charity reengineered, the services we offered and developed new services too, so that we could offer these through the challenging times of the pandemic, and still aim to 'improve the lives of older people'.

With the Coronavirus pandemic, the following were still our key strategic focus over this period for Age Concern Mole Valley, along with the Business Plan's objectives:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

In this difficult financial year Age Concern Mole Valley has supported older people with over 5000 activities and continued to develop core projects, such as, the Befriending and Visiting Service into a Telephone Befriending service and then we expanded the Information & Signposting Service, adding over 100 new local groups/initiatives that had evolved due to Covid 19. We developed the Computer Courses into a Remote Information Technology Telephone Service. The following services were put on hold due to face-to-face restrictions: Will Writing, Tai Chi and Events. The staff team were amazing calling all of our befriending clients to make sure they were ok and that they were happy to move to telephone befriending.

Here are some of the key achievements in such a challenging year.

The Age Concern Mole Valley 'Local Community Support Programme' encompasses in normal times: home visiting, information & signposting, befriending and social events, which are broken down as follows:

The Information and Signposting Service has continued to develop extensively over this period, with Julia Gallagher our Information & Signposting Officer and June Mills our Administrative Assistant. In 2015/16 we noted over 450 enquiries covering various themes, from computer courses, befriending to needing gardening and home support and in 2019/20 we noted over 600 general enquiries. Each year we continue to see growth, this year we have added and updated many organisations/coronavirus initiatives and the service has noted over **850 activities, including over 500 individual enquiries,** most of which will often be signposting to more than one service, as we like to give people choice. The development and updating of this invaluable resource is always an ongoing action.

The **Befriending/Telephone Befriending Service is part of our** 'Local Community Support Programme', which continues to be a vital contribution to reducing loneliness and isolation, one of our key aims. This is a growing problem among the older population in Mole Valley and has been identified as such, by Mole Valley District Council and Age UK nationally. This service is all about reducing loneliness and isolation, increasing community cohesion with local communities coming together, plus improving the health and wellbeing of the older person and in some cases the volunteer. The aim is to enable, the older person to regain social and interpersonal skills which may have become less due to the loss of a loved one, friends, or a close relative moving out of the area.

In mid-March 2020, with the onset of the Coronavirus we started to develop our face-to-face Befriending Service to that of a Telephone Befriending Service. Initially we called over 60 clients to explain the development of our service and how many of our face-to-face volunteer befrienders would become telephone befrienders to help our clients through these unprecedented times. We would not have been able to assist our clients without our dedicated staff and volunteers. These telephone calls were a lifeline for many of our clients.

The difference we continue to make is one of reducing social isolation and loneliness. The older people we support were self-isolating in their home and unfortunately face-to-face visits were not an option for most of the year. Therefore, a regular telephone chat from their telephone befriender did help reduce that isolation. The volunteer also signposted back to Age Concern Mole Valley, if there were other needs and requirements that may not be noticed by any other members of the community at this time of isolation. We supported 'new' older people to the Telephone Befriending service and helped with Information & Signposting to local organisations that emerged since the Coronavirus. Here are some examples from both the client and the volunteer of how this vital service 'improves older peoples' lives':

> *"I've been seeing Kate for a couple of years. It's made such a difference to me and is a really important part of my life now. I always look forward to our meetings and feel better after I've seen her. Living here on my own I sometimes feel isolated, especially since the Coronavirus crisis. ... Kate has become a proper friend now, it's like we've known each other for ever. She comes over for a coffee on her lunch break once a week and we usually speak on the phone for around an hour on a Sunday afternoon as well. Obviously while the crisis is still on, she can't come to visit, which has been difficult as I miss seeing her, but we still chat on the phone and there's always lots to talk about."*

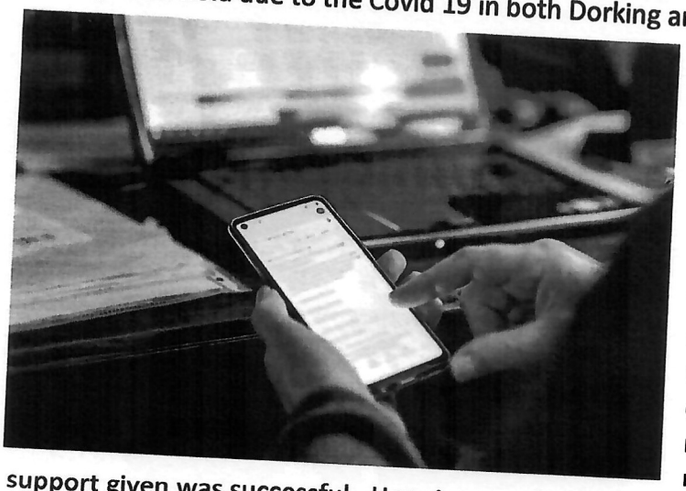
"Having someone to talk to has really helped me cope with the loneliness ... I don't know what I'd do without her now. In fact all the people at Age Concern Mole Valley have done a grand job."

"We have lovely long chats about all and everything. We have a giggle too as we both share a sense of humour. So, all in all, a positive start."

"I thought the induction training was really comprehensive and extremely useful, I feel the volunteers and clients are in safe hands with ACMV"

Over this time period we had 15 new volunteer befrienders/telephone befrienders, making a total of 70, a 26% increase on the previous year. These volunteers provide an invaluable service to lonely and isolated older people. This is highly appreciated by Age Concern Mole Valley and the person they are visiting.

Information Technology (IT)/Telephone training/support - the IT training face-to-face sessions were put on hold due to the Covid 19 in both Dorking and Leatherhead.



The sessions are for people over 50 years old. During this period, we have supported previous 'learners' over the telephone. We had over 200 'learners' that have attended previous courses. Some of our 13 IT Volunteers were happy to call these 'learners' to establish if we could offer further support with their IT learning and any other Information & Signposting needs. We did make contact with many learners and the IT remote support given was successful. Here is some feedback from a 'learner' regarding what they have gained and how they will use what they have learnt from the support given by Age Concern.

"I am really happy that I can join prayer meetings and services via Zoom now, the IT volunteer that called me was so patient with me. I want to thank you from the bottom of my heart for all the help and support you have given me. I can't set meetings up myself yet but being able to attend prayer meetings is really important to me."

"One of our IT learners wanted me to send you her very best wishes and "many thanks because she's able to do so many things that she couldn't before and she's really enjoying herself using her iPad."

Volunteers – Volunteers' Week, over this period we have had a total of 86 volunteers and sadly this year we have not been able to hold celebratory events to thank them for their commitment

to Age Concern Mole Valley. We have continued to recruit new volunteers for the telephone befriending/befriending service. We need more and will continue to look to the local community for volunteers to support in delivering our services. We have matched and re-matched 29 volunteers with new befriending/telephone befriender clients, so we had 70 Volunteer Befrienders over this period. We had 13 volunteers that helped deliver our Information Technology related learning support. Age Concern Mole Valley is extremely grateful for the unstinting efforts of all its volunteers who are involved in service provision, and they are highly valued for their support. Without our volunteers we would not be able to achieve our aims and objectives and 'Improve the lives of older people' in Mole Valley.

General Data Protection Regulation (GDPR) – over this period we continued to have this as an area of focus at each Executive Committee meeting.

Funding Applications - in 2020/21 one area of focus by the CEO was to secure funding contributions to support the charity and we want to give thanks for that support as follows:

Funded by

Community Foundation for Surrey – we thank the CFS for their ongoing support and the hard work, they do on behalf of the voluntary and community sector in Surrey. We had a £5,000 grant towards support for the charity in relation to Covid 19. A £15,000 grant went towards our Local Community Support Programme. The needs of many of the older people that Age Concern Mole Valley supports will relate to reducing their loneliness and isolation in the community, with the added outcome of improved health and wellbeing. The Age Concern Mole Valley 'Local Community Support Programme' encompasses home visiting, information & signposting, Telephone Befriending and Befriending.

Garfield Weston Foundation – this £7,500 grant went towards all the charities running costs and services, particularly our 'Local Community Support Programme'. The Garfield Weston Foundation supports small community groups, to large national institutions, the Foundation's aim is to support organisations that have effective solutions to helping those most in need. Thank you for your contribution and continuing support.

The Henry Smith Foundation – this £10,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme'. Henry Smith aims to use their resources to help people and communities at a time of need and to bring about positive change. We thank you for your contribution.

COMMUNITY FUND

The National Lottery Community Fund

25 YEARS OF THE NATIONAL LOTTERY

The Coronavirus Community Support Fund – this £15,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme' throughout the pandemic. We thank you for your support.

Surrey County Council – this £10,000 grant went towards supporting all of the charity's running costs and services through this year of the Coronavirus pandemic. We also had support from Hazel Watson, one of our local county councillors with a £1,000 contribution towards new laptops from her Members' Community Allowance. We thank you for your contribution.

Mole Valley District Council

Mole Valley District Council – this £5,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme'. We thank you for your contribution.

SHANLY FOUNDATION

Shanly Foundation - this £2,000 grant went towards the charity's Befriending service; we thank you for your contribution.

The Edward Gostling Foundation
Enhancing Quality of Life for People in Need

The Edward Gostling Foundation – this £5,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme'. We thank you for your contribution.

THE CHILDWICK TRUST

The Childwick Trust – this £5,000 grant went towards all of the charity's running costs and services, particularly our 'Local Community Support Programme'. We thank you for your contribution.

Unum a local supportive company - contributed £500 to the charity, which was used towards our community services through our Telephone Befriending.

The Sir Jules Thorn Charitable trust kindly gave a £1000 donation to Age Concern Mole Valley, and we thank them for their contribution.

ExxonMobil – has kindly made a **£500** donation towards our community services and we thank them for their continued support.

Age UK nationally – this £250 grant was used towards the purchase of 2 new laptops for staff and we thank them for their contribution.

The future has many challenges for charities such as, Age Concern Mole Valley. The main area of focus will be a sustainable fundraising programme for the future and also the recruitment of more volunteers to support all that we deliver. The re-opening of face-to-face services is the main priority as we enter the next phase of the coronavirus pandemic in April 2021.

The Future

Age Concern Mole Valley will continue to develop and build on the invaluable work it has achieved in previous years. Our vision is to 'improve the lives of older people', and as we end this financial year and go into the next, we face the challenge of resuming face-to-face services safely. Older people are some of the hardest hit and as we come out of this pandemic, we will not change our key aims which underpin all our future plans to continue our invaluable services:

- **Reduce loneliness and isolation in Mole Valley for older people**
- **Improve the health and wellbeing of older people**
- **Make greater connection with the local community**
- **Provide an accessible Information & Signposting Service for older peoples' needs**
- **Increase awareness of Age Concern Mole Valley's services**
- **Increase partnership working**
- **Build a fundraising programme, supporting the provision of services and providing long term stability to ACMV**

Coronavirus has in the short term changed how we delivered our services in this last year, as face-to-face was in the main, restricted. We have followed government guidance throughout the pandemic regarding the delivery of our services, creating guidance for our staff, volunteers and clients to ensure their safety.

In February 2021 the Government set out its roadmap, a step-by-step plan to ease restrictions in England cautiously. Since February, the roadmap has guided our approach to how we will ease restrictions and we have created our own 'Road Map' for opening up services.

We will continue to develop and open-up the Age Concern Mole Valley 'Local Community Support Programme' which encompasses home visiting, a level of information & signposting, befriending and social events. The programme is ongoing, it aims to reduce social isolation and prolong independence and reduce demand on social care and health services. The **Befriending part of the programme** – will return to face-to-face. There will be refinements to the service in relation to the Coronavirus and taking into account government guidance. We will continue to support our elderly clients by telephone to offer reassurance and to check on their welfare. In May 2021 we will return to the initial face-to-face home visits. It has been agreed that we then need to revisit both our clients and volunteers to assess their personal choices and the management of risk. We see the need to be flexible and person-centred as every volunteer and client and their particular circumstances will be different. With this in mind we have put together a Covid 19 risk analysis framework for both clients and volunteers. Then staff will ask each client/volunteer key questions, so that a risk analysis can be completed.

The Volunteer will need to wait until the client risk analysis has been completed to see if the client wants to return to face-to-face visiting, then we will move onto the volunteer risk analysis. It will have to work for both parties, as it is a personal choice and individual risk. For example, questions regarding mask wearing, social distancing and preferences regarding vaccinations. This will be a large piece of work but essential to understand peoples' choices after the pandemic. Covid 19 has developed our approach across all services, and we will be asking important questions on people's preferences going forward into the next financial year.

In relation to **General Data Protection Regulation (GDPR),** the charity will continue to review processes throughout the year.

Information and Signposting – this will continue to be a huge area of development and updating in 2021/22 with the number of new organisations we added throughout the Coronavirus pandemic. This will be essential, so that we can signpost people to local services as they emerge and develop. We will continue to build on the current service, revisiting contacts and double checking our information, so that we provide a useful information portal for those looking for services to support older people.

Information Technology (IT)/Digital Learning Sessions – the valuable IT/Digital Learning sessions will start again later in 2021 in both Leatherhead and Dorking. We will use a similar approach as with the Befriending Service, person-centred as every volunteer and learner will have their own preferences regarding their learning approach. With this in mind we will put together a Covid 19 risk analysis framework for both learners and volunteers.

Partnership Working – we will join a network of local organisations that support older people across Mole Valley, facilitated by Mole Valley District Council.

Corporate Relationships – we plan to continue to work with **ExxonMobil,** Leatherhead and **Uňům** in Dorking regarding their Employee Volunteering schemes and how we can work in partnership in the future.

Will Writing – in relation to the Coronavirus we will monitor government guidance and look to continue this valuable service and work in partnership with **Meaby & Co Solicitors** in early 2021/22. We thank Esther Janalli-Brown, solicitor at Meaby & Co for her continued support.

Future Fundraising – in relation to financial resources, this will continue as a focus for the forthcoming year, through continued fundraising, to restore the charity's reserves.

It has been a memorable and eventful year, and now we go forward opening up our face-to-face services with a 'vigilant approach. A huge 'thank you' to the staff team, Andrea, Julia and June for all their hard work this year. Our vision 'improving the lives of older people' is as always central to all that we deliver and will develop in the future, despite the Coronavirus.

Sonia Hubbard, Chief Executive Officer

Message from the Chairman

The Voluntary, Community and Faith Sector make a huge contribution to the lives of people in Mole Valley, providing a range of services and support to the community. Age Concern Mole Valley will continue to provide and build on its invaluable support services to older people, so in turn their service delivery will impact and make a difference to the community in Mole Valley, and 'improving the lives of older people'. In 2020, the voluntary sector played a huge role in supporting local residents through the Coronavirus pandemic with shopping, prescription collection etc. and regular telephone calls to isolated older people to ensure that they had communication with the outside world, especially through the various lockdowns.

It has been a difficult year for us all and as a charity we continued to be very active throughout the pandemic. I would like to thank all my Trustee colleagues and all our wonderful volunteers for their support of our isolated clients, plus Sonia Hubbard (CEO) and the staff team for their continued hard work in support of the charity and their strong commitment to our vision through what were 'unprecedented times'.

Sally Dubery
Chairman

Financial Review

Income for the period totaled £116,468, including several grants from charitable trusts and foundations, together with donations from individuals and local organisations.

Expenditure was maintained at a slightly lower level to the previous year £83,982, due to a reduction in office space and reduced service delivery costs due to Covid 19.

This results in an overall surplus of £32,486.
At the end of the year, the charity has reserves of £30,000, which is 3 months running costs and the charity's reserves policy.

Reserves Policy and Risk Management
The Trustees have carefully considered the forecast of income and expenditure for the year 2018/19 and have concluded that it is appropriate to utilise the reserves in maintaining the resources available to the organisation to enable it to continue its activities in key areas.

Trustees' Responsibilities in relation to the Financial Statements
Charity law requires the Trustees to prepare financial statements that give a true and fair view of the state of affairs of the charity at the end of each financial year and of its surplus or deficit for the financial year. In doing so, the Trustees are required to:

- Select suitable accounting policies and apply them consistently
- Make judgements and estimates that are reasonable and prudent
- Prepare the financial statements on a going concern basis unless it is inappropriate to assume that the charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the new FRS 102 (SOFA) and the Charities Act 2011.

The Trustees are also responsible for the safeguarding of the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Reference and Administration

Legal and reference information, which is shown after the contents page, forms part of this report. The financial statements comply with the current statutory requirements, the charity's governing document and the SORP 'Accounting and Reporting by Charities'.

On behalf of the Trustees

Section A

Independent examiner's report on the accounts

Independent Examiner's Report

Report to the trustees/ members of Age Concern Mole Valley

On accounts for the year ended 31st March 2021 **Charity no (if any)** 1111678

Set out on pages 1 to 4

Respective responsibilities of trustees and examiner The charity's trustees are responsible for the preparation of the accounts The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed
It is my responsibility to

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent examiner's statement My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement In connection with my examination, no matter has come to my attention

1 which gives me reasonable cause to believe that in, any material respect, the requirements

- to keep accounting records in accordance with section 130 of the Charities Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act

have not been met; or
2 to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached

Signed: A.C. Wheeler **Date:** 17/08/21

Name: Andrew Wheeler

Relevant professional qualification(s) or body (if any): ACCA

Address: Taxsense Accountants
203 West Street
Fareham
Hampshire
PO16 0EN

CHARITY COMMISSION FOR ENGLAND AND WALES

Age Concern Mole Valley	1111678

Receipts and payments accounts

CC16a

For the period from	1/4/2020	To	31/03/2021

Section A Receipts and payments

A1 Receipts	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
Charitable Trusts	113,050	-	-	113,050	29,123
Services provided	946	-	-	946	5,281
Donation & Legacies	2,472	-	-	2,472	6,742
Interest Received		-	-		883
Sub total *(Gross income for AR)*	116,468	-	-	116,468	42,029
A2 Asset and investment sales, (see table).					
Sub total		-	-		-
Total receipts	116,468	-	-	116,468	42,029
A3 Payments					
Expenditure on raising funds	1,214	-	-	1,214	844
Expenditure on Charitable Activities	82,768	-	-	82,768	90,543
Sub total	83,982	-	-	83,982	91,387

A4 Asset and investment purchases, (see table)						
	-	-	-	-	-	
	-	-	-	-	-	
Sub total	-	-	-	-	-	
Total payments	83,982	-	-	-	83,982	91,387
Net of receipts/(payments)	32,486	-	-	32,486	-49,358	
A5 Transfers between funds		-	-		25,657	
A6 Cash funds last year end	28,509	-	-	28,509	53,254	
Cash funds this year end	60,995	-	-	60,995	29,553	

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	60,995	-	-
			-	-
			-	-
	Total cash funds (agree balances with receipts and payments account(s))	60,995	-	-

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
Tangible Assets	Unrestricted	9423	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Sally Dubery	9.11.21

Age Concern Mole Valley

For the Year Ended 31 March 2021

Charity Number 1111678

Note 1 2021 Income and Expenditure Funds

Income and Endowments

	2021	2020
	£	£
Receipts from Events/Gift Aid/Royalties/Standing Orders	946	5,281
Computer donations	1,250	1,795
General donations	1,222	4,947
Grants	113,050	29,123
Interest received	0	883
Charity income 2021 totals	**116,468**	**42,029**
Resources Expended		
Expenditure for raising funds		
Direct fundraising expenses	71	97
Allocation of general overhead expenses	1143	747
Direct Charitable Expenditure		
Visiting and Befriending, Information and Signposting	4,800	10,124
Staff Payroll	74,045	73,008
IT Support/Laptops/Broadband etc.	2,262	3,595
Accountancy fees	594	510
Tai Chi programme	-	2,471
Website/ Marketing development	242	-
Governance	368	334
Sundry Expense	335	501
Depreciation on office equipment	121	-
Total Direct Charitable Expense	**83,982**	**91,387**
Surplus for the year to transfer to reserves	**32,486**	**- 49,358**

Age Concern Mole Valley
Balance Sheet
As at 31.03.2021

	£ 2021	£ 2020
Fixed Assets		
Tangible assets	1044	-
Investments	-	-
Current Assets		
Debtor	-	-
Cash at bank	60,995	29,553
	62,039	29,553
Current Liability		
Creditors:		
Amounts falling due within one year		
PAYE	-	
Accruals	-	-
	-	-
Net current assets	62,039	29,553
Total assets less current liabilities	62,039	29,553
Long term loans	-	-
Net Assets	**62,039**	**29,553**
Designated funds	65,000	65,000
Unrestricted funds	(2,961)	(35,447)
Restricted funds	-	
Total Charity funds	**62,039**	**29,553**

Client Approval Certificate

I approve these accounts and confirm that I have made available all relevant records and information for their preparation.

Signed:

Dated: 9.11.21

Age Concern Mole Valley

Notes to the Accounts For the year ended 31 March 2021

Notes to the Financial Statements as at 31 March 2021

1. Basis of Preparation

The financial statements have been prepared under the historic cost convention, following the recommendations of the Statement of Recommended Practice known as FRS 102 (SORP) introduced in 2014 covering charities with a year end after January 2015.

2. Accounting Policies

a) Income

All income is accounted for on an accrual basis, except for voluntary donations, which are taken into account when received Grants are recognised in full during the year that they are received Incoming receipts from tax reclaims are included in the SOFA at the same time as the gift to which they relate.

b) Fixed Assets

Fixed assets are stated at cost and depreciation is provided at rates calculated to write off the cost of each asset over its expected useful life Computer equipment and office equipment 25% straight line basis It is the Charity's policy to capitalise fixed assets that are above a de minimis level of £500

c) Resources expended

Resources are accounted for on an accruals basis. Expenditure is appointed to cost categories based on the amount attributable during the year, including the cost of generating funds, charitable activities. Governance costs include legal costs and Trustee meetings only

d) Recognition of liabilities

These financial statements recognise all liabilities that the charity has responsibility for. The charity is not aware of any contingent liabilities.

Age Concern Mole Valley
Notes to the Accounts For the year ended 31 March 2021

3. Staff

The charity has been well represented by Sonia Hubbard, Andrea Kelley, Julia Gallagher and June Mills throughout the year.

4. Tangible Fixed Assets

	31.03.2021	Movement of the year	31.03.2020
Cost	8379		8379
Addition	1166		
Accumulated Depreciation	-8379		
Depreciation Charge	-121		-8379
	1044		0

5. Lease

During the year, the Charity took one office space at the Point in Dorking.

This lease continues until February 2023 at an annual cost of £6,300, but with a general break clause after 3 months' notice.

6. Commitments

There are no other commitments not recorded in the financial statements.