

**Charity registration number 1123359**

**Company registration number 06418743 (England and Wales)**

**CARERS SUPPORT WEST SUSSEX**  
**ANNUAL REPORT AND FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 MARCH 2023**

# CARERS SUPPORT WEST SUSSEX

## LEGAL AND ADMINISTRATIVE INFORMATION

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Charity name	<b>Carers Support West Sussex</b>
Registered charity number	<b>1123359</b>
Company Number	<b>06418743</b>
Charity's principal address	<b>The Orchard, 1-2 Gleneagles Court, Brighton Road, Crawley, RH10 6AD.</b>

<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>
Neal Young	Chair Human Resources Committee  Chair	
Christine Field	Vice Chair	
Sue Knight	Vice Chair	Resigned 27.10.22
Philip Lansberry		Resigned 17.04.23
Narendhra Morar		Resigned 03.01.23
Paul Isaacs		Resigned 20.04.23
Jane Green MBE		
Alan Beasley	Chair Finance and Risk Committee Finance Trustee	
Nikki Jeffery		
Paul Estep		02.03.23

### **The following Trustees have been appointed since the year End:**

Alison Fox 22 June 2023

Barbara Williams 24 August 2023

David Gayler, Rob Mansfield, and Caterina Maniscalco will be joining at the AGM in October 2023.

Note that the Trustees of the Charity are also Directors of the registered charitable company (for purposes of the Companies Act 2006).

CEO: Sonia Mangan

### **Professional Advisers**

The professional advisers disclosed for the period 2022/23 are:

Auditors            Richard Place Dobson Services Limited  
Chartered Accountants  
1-7 Station Road  
Crawley  
West Sussex  
RH10 1HT

Bankers            Royal Bank of Scotland  
36 St Andrew Square  
Edinburgh  
EH2 2YB

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# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT)

### FOR THE YEAR ENDED 31 MARCH 2023

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#### Report of the Trustees

The Directors present their report and the financial statements for the year ended 31 March 2023.

The financial statements have been prepared in accordance with the accounting policies set out in Section One to the financial statements and comply with the Charity's Memorandum and Articles of Association, the Companies' Act 2006, and Accounting and Reporting by Charities: Statement of Recommended Practice (2019) applicable to Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland.

Carers Support West Sussex was registered on 28 March 2008 and was incorporated on 6 November 2007.

#### 1. Objects

The Charity's objects are:

*To relieve poverty, sickness and mental suffering of people who are carers, whether on a full or part-time basis living in West Sussex and its environs for people who are elderly, disabled, ill or frail for any reason whatsoever and the relief of such elderly, disabled, ill or frail people by the provision of practical help and assistance, advocacy, and information for those responsible for their care.*

*To advance the education amongst carers and the general public concerning caring and the support and treatment of those requiring support from carers.*

#### 2. Main Activities

Carers Support West Sussex (CSWS) is an independent charity in West Sussex dedicated to improving the support provided to unpaid carers, to enable them to have a good quality of life, access to information, guidance, and encourage independence, to give carers a choice of a life alongside their caring role. There are around 120 members of staff and 72 volunteers. The Charity team also benefits from a highly dedicated Board of Trustees.

With more than 31,000 carers registered with the Charity (as at 31 March 2023), the team run Support Groups, a Carer Response Line, help carers access equipment to assist them in their caring role, or provide funds so that carers can do something for themselves. The Charity team can also help carers access counselling, coaching, wellbeing support and have teams in all the of the major hospitals in West Sussex, as well as East Surrey Hospital in Redhill.

#### 3. Achievements and Performance Against Charity Objectives

The 'Impact Report Infographic' for 2022/23 <https://www.carerssupport.org.uk/impact-report-2023> gives a flavour of CSWS team activity during a time which has been described by carers as 'crushing.'

Carers are at the heart of everything we do and as such their voices have been a key part of our [Strategy Aims And Objectives 2021-25 \(carerssupport.org.uk\)](#) which was published during July 2021. As the financial year ended, we started our carer consultations to ask carers in West Sussex how we are doing, in other words what is working for them, what isn't and what more we can do together with partners to better support them.

Imagine a world where carers do not have to fight to be heard and recognised. A world where carers feel valued and supported for who they are and what they do.

Our vision is to bring the day forward when unpaid carers are seen, heard, and included.

We believe the six strategic aims and objectives and the associated delivery intentions best address the challenges facing carers and our organisation.

#### 3.1 Census 2021 – What We Know About Unpaid Carers in West Sussex

[Nomis \(official census and labour market statistics\)](#) has released the full dataset for Census 2021 results.

During February and March 2023, the results from the 2021 census were published and the results showed:

- In 2021, 72,815 people self-reported as being in an unpaid caring role in West Sussex, representing approximately 8% of the total population in West Sussex.

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

- Females tend to take on more caring responsibilities than males, with an estimated 43,346 (or 60%) female carers compared to 29,147 (40%) male carers. With 4% (or 2,710) of females living in Arun providing more than 50 hours of unpaid care compared to 2% (or 1,803) of males.
- Those of working age (16 – 64) account for approximately 71% of unpaid care, whilst over 65's account for 27%. And 55% of carers are economically active (excluding those in full-time education).
- Arun has the greatest number of unpaid carers at approximately 14,569 followed by Horsham 11,612 and Mid Sussex 11,582. Adur has the fewest number of self-reported carers, at 5,876.
- 10% (or 7,084) of carers are from ethnically diverse backgrounds, with 2% residing in Crawley and 4% identifying as Gypsy, Roman or Traveller.
- 3% (or 2,261) of carers identify as LGBTQ+.
- 26% (or 19,082) of carers are registered disabled under the Equality Act, and 18,559 carers reported not being in good health.

#### 3.2 Strategic Aim: Be connected

**Specific Objective:** We will meet carers wherever they are in their journey, working individually with at least 4,000 every year to improve their health and wellbeing.

During 2022/23 the CSWS team worked with **10,389** unique carers by email, telephone, face-to-face, Zoom individually and in groups and via online chat functions. Almost half, **49%**, were supporting carers with two or more conditions and with teams reporting work on at least two challenging issues in most cases. Compared to the same period last year the team has had a **34% increase in carer engagement and activities**.

Our teams provide a range of locality-based and specialist support and during the year worked with carers supporting: people with a long-term condition (24%), people with dementia (22%); people with a mental health condition (8%); people with a physical disability (12%); people with a learning disability (4%); people with substance use issues, or addiction/recovery issues (2%); people who are frail/elderly (11%); autistic adults (3%); and under 18 with a disability or parent carers (14%).

During the financial year 7.7% of the carers we supported were from ethnic minority communities (compared to 4.9% in 21/22).

We have worked with 610 carers providing them with a Statutory Carer Assessment to gauge how the caring role affected their life and we completed a further 1,386 light touch Carer's Assessments enabling carers to consider what would help them to support their own health and wellbeing.

We have had 233 different carers groups/events in total, both online and face-to-face. The groups were attended 2,434 times, by 859 unique carers.

#### Mindfulness and Connections – Frank and his Son David, an Autistic Adult.

Frank is 72 years old and a joint carer with his wife, for their son, David, 37, living with autism. Unlike his wife, Frank likes to connect with other carers in similar situations and has found carer wellbeing walks and carer group meetings (online) most helpful. He finds staying connected with others in similar situations makes him feel less isolated and alone. Frank has been able to build friendships and a support network out of these carers' get-togethers and felt encouraged to also sign up and complete the eight-week Mindfulness-Based Living course. Following on from this course, Frank regularly practices mindfulness techniques to help settle himself when his caring role feels overwhelming.

#### 3.3 Strategic Aim: Be the early offer

**Specific Objective:** Provide the carer contact point and increase new carer registrations by a minimum of 10% year-on-year.

We seek to **Be the early offer** for all carers, of which the 'front door to our service, is the Response Line. Open six days a week and staffed by our Carer Wellbeing Support Workers our service is accessible and allows carers to contact us via email, webchat, and telephone.

There are over **31,000** carers registered with us. In the last year we have had a **26%** year-on-year increase in carer registrations – a staggering **5,301** new carers registered with us.

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

Our Response Line Team have handled 22,403 incoming and outgoing calls; exchanged 28,199 emails and supported 553 online chats with carers. Young adult carer registration was up 15% (75 new registrations) on last year.

We delivered over £1.3m to 3,456 carers in hardship and wellbeing funding during the year. Of those funds between July 2022 and March 2023, over £711,100 was awarded to 1,835 carers who qualified for this grant to help with food and bills and 466 carers received a total of £232,863 in funding to support with household items. A further 1,048 carers received a portion of £328,914 to provide support in improving overall health and wellbeing and 463 parent carers were awarded grants to the value of £102,160.

Our Carer Benefits' Service helped 742 carers collectively gain £1,078,071 in additional annual benefits. And 1,447 carers were allocated equipment to support their caring role to the value of £65,650. We work in partnership with local businesses in West Sussex to offer family and friend carers in the county a range of exclusive offers and discounts through the Carer Discount Card; 3,906 cards were sent to registered carers. A total of 1,307 carers have registered for the Carer Emergency Card which offers a contingency in case they are unable to care.

#### 3.4 Strategic Aim: Be the experts in carers

**Specific Objective:** Influence communities, partners, and decision makers across the county to deliver what carers say they need.

We make it our business to amplify carer voices, bringing them to communities, partners, and decision makers across the county. Our Carer Voice Network with 30 active members provides a platform from which carers hold a strong and active voice to influence and co-produce projects. During the year we have worked with and for carers to bring their voice to 24 different activities, opportunities, and events.

#### Co-Production Group

We have been a part of the local Co-Production Practitioners' Group with WSCC enabling carers to co-produce with the council's Quality, Service and Practice Development Team. Three carers have taken part in helping to review the portfolios for newly qualified social workers. We are working with the same team to review their current social worker interview processes and five carers are going to be helping with this additional opportunity.

"Carers have been enthusiastic in their involvement and worked in partnership with myself and social workers to review the social workers' written portfolios of work and support their practice. Anecdotally some of the social workers have shared with us that the carers' involvement was really helpful and aided their reflection".

– Julia Cassidy, Professional Practice Development Worker, WSCC

#### Carer Group Coaching

In April 2022, we allocated all available spaces for two online sessions for an 'Introduction to Coaching', with a combined total of 51 spaces booked. A demand for this type of wellbeing support was demonstrated, and as a result we have piloted a Carer Group Coaching Programme based around four carer-led themes (Time for Yourself; How You Feel; Managing Stress and Setting Boundaries). This pilot has been co-produced with three carers as part of a Working Reference Group.

**Key Marketing, Communications, and Carer Tracking Activity in the Year:** Our website received 92,942 users – a 25% increase year-on-year. We sent 114 carer information and specialist emails to our email network of 19,000 carers and posted 1,331 social media posts, which gave useful information about carer-related topics. We also managed two paper mailings and two text alerts to offline carers on our database.

We hosted a One Big Day Event on 29 April 2022 <https://www.carerssupport.org.uk/read-more/one-big-day-2022> and the team took the lead with carers on the planning, messaging, and branding for the event. The event was an opportunity for West Sussex-based carers to mingle with other carers and members of the Carer Strategic Partnership. 108 attended the event, of which 63 were carers and 45 professionals.

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

The theme for Carers' Week 2022 was 'Make caring visible, valued and supported.' This was the first year, post COVID-19 restrictions, where the offer of a combination of both online and face-to face events were given. There were 12 face-to-face and six online events. Of the 202 tickets allocated a total of 129 ticket users attended, with 91 individual carers attending the different events throughout the week. We have been improving carer attendance at groups and events through a texting reminder initiative launched in August 2022.

**Behaviour tracking:** Our website metrics tell the story of increasing usage year-on-year (this financial year to the previous) and how return visits are also on the increase. Followers to our social media channels have increased by 12% year-on-year.

Our carer e-newsletter, sent to just under 20,000 registered carers, continues to excel in industry standards, with a 52% open rate in May 2023.

The online metrics tell us we are providing external communications which are hitting the mark with carers.

**Building a picture on the position of caring:** The carer database serves to record individual demographical information. The number currently of registered carers sits at approximately 31,000 – it is an ever-increasing figure. Holding this information creates an opportunity to better serve those registered with us when we look at their position on the carer journey and how we tailor communications. For example, we are sending a mailing to 5,862 carers about renewing their Carer Emergency Card, using the database-enabled carer contact tracking.

Every time contact is made, the database builds on the last entry and tracks progress. For some, this could signal the end of their need for our service. For others, it can be the start of a longer interaction.

“From the first meeting, as a carer I felt part of the working party, my input, opinion, and feedback mattered, was validated and valued. I was listened to, involved, supported, valued as a person throughout and being part of the group gave me a purpose, which I had lost years ago. On a personal level, I initially struggled with giving feedback, as I lack self-belief, as in the past feedback, and opinions were at times dismissed.

But as the planning of the programme developed and being a participant on the programme too, this has become easier. This is because of feeling safe, feeling part of the group and knowing that my input and involvement in the process mattered and was appreciated.

Whenever I made suggestions, observations written or spoken, I always felt listened to and appreciated, never dismissed or my views less important. This was further validated when changes were made. But most of all I felt valued as a person, member of the working group and that my observations as a carer were heard.”

– Maria, Carer as part of the Working Group for Carer Coaching

### 3.5 Strategic Aim: Be present in the community

**Specific Objective:** Be there for all carers in West Sussex: locally and culturally appropriate, visible, and accessible.

Through connection with the communities and engagement with carers, CSWS has identified new services and has gone the extra mile in sourcing external funding to deliver projects that have a positive impact on the lives of carers. During the year CSWS teams have worked with over 500 partner organisations to raise the awareness of carers.

**Making Carers Count** is the Sussex Carers' Partnership which is a collective of three Network Partners, who have worked together for many years on several pan-Sussex activities. As part of this Partnership, we are supporting ethnically diverse carers pan-Sussex. For more information, please visit: <https://www.carerssupport.org.uk/making-carers-count>. This project has supported 153 carers, from diverse backgrounds, with 1:1 support. A further 432 carers

were contacted by other means, such as emails, providing information and inclusion in surveys.

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

*"I've had a very difficult caring situation and have not known who to turn to. I am not fluent in English, so rely on my children to help me make phone calls. However, as you speak the same language as me, it has been very helpful for me to speak to you directly and explain everything that is happening. The information you have shared with me in my own language has enabled me to understand how processes work and I can think about what support I would like to accept".* Female carer of Pakistani background aged 42 and looking after husband with mental health issues. Translated from Urdu to English.

**Bilingual Memory Navigator** role is to support the Crawley community of family carers either through a pre-diagnosis of dementia and/or post care.

The memory navigator has directly supported **50** carers that are now registered with us. There have been enquiries from **120** carers, who do not wish to register due to cultural reasons.

*"It was great to have Carers Support visit the mosque; we have always found Carers support West Sussex most helpful. They're a very friendly group and will do whatever they can to assist you.*

*This role is beneficial and important to our community. I cannot speak any other than to praise the navigator most highly for all the work done for our community."*

Kind regards, Ubaid Khan secretary of Broadfield Crawley Mosque.

### 3.6 Strategic Aim: Be Partners

**Specific Objective:** Create at least four new tangible partnerships leading to opportunities for and with carers.

In our Strategy we set one of the key strategic aims to 'Be Partners' creating tangible partnerships leading to opportunities for and with carers. Our aim is to work with partners who support carers from across the county. The teams have specialist workers supporting parent carers, carers of people with mental health issues, dementia, learning disability, autistic adults and those impacted by another's drug and alcohol use. Plus there are locality or community-based teams: Arun, Crawley and Mid Sussex, Chichester and Horsham, and Adur and Worthing.

The **Chichester and Horsham Team** have been responding to the needs of carers by offering wrap-around support through connecting carers to local services such as local Wellbeing Teams, Foodbanks and Social Prescribers. The team works with partners particularly in rural areas, such as Terry's Place, Calamity's Café, and Horsham District Council Multi-Agency Drop-Ins. We have increased access to our service through drop-ins and carer groups to engage with carers who are isolated or digitally excluded. We have focused on raising awareness of carer needs through sessions delivered to GP Surgeries and VCS teams.

#### Caring Across Generations – Hilary and David

Hilary and David care for two people – the first is Hilary's elderly mother (93) living with Alzheimer's and then their grandson (12) with brain trauma, for whom they have parental responsibility. Respectively, both cared-for have complex needs and Hilary also has her own health issues.

From managing behaviour that challenges, to supporting an elderly parent needing more and more support, Hilary and David felt that they had no lives of their own as they were always having to put the needs of their family members before their own. They felt they were being 'pulled in half' and found their caring responsibilities relentless. At one point, when Hilary's health had deteriorated, David became a pillar of support and a sole carer for all three. Although Hilary's mother has since moved into a care home as her condition declined, it has been difficult for Hilary to manage the emotional guilt of relinquishing parts of her caring role for her mother. Hilary appreciates that her mother is now in a safe place with her support and care needs being met.

What's been most helpful during these changing circumstances, for both Hilary and David, is attending the specific Carer Group Meetings (parent carer and dementia) as they feel they walk away from these meetings with invaluable information to help them manage their different caring situations. What they like most about the groups, is the 'silent acceptance and understanding' from carers in similar circumstances.



# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

The **Arun Team** launched a Carer Café Group, alternating between Littlehampton and Bognor. These have proved to be extremely popular from the start to the point that since January 2023 we are now hosting monthly meetings in both locations. Our partnership work has focused on key partners within the locality, very much related to the support being asked of us: Arun Wellbeing Team, Carers' Health Team, Citizen's Advice, Social Prescribers, Dementia Support/Sage House GP Surgeries. Where we have specifically focused our time is the town of Arundel, as we have found this an area where we have exceptionally low levels of carer engagement. We are now in touch with some key people within the Arundel community, and since the beginning of the year we have a Wellbeing Worker attending the Elevesens' Club monthly. This Community Hub is invaluable to the residents of Arundel and has enabled us to reach out and connect with the many people who do recognise that they have a caring role.

We were able to host a marketplace event in Arundel in March, with 16 partners showcasing their services and support.

Other key partnerships for the team Arun include Older Person's Network, Mind Pathfinders Local Planning Group, Arun, and Chichester Food Partnership plus VAAC's invaluable networking meetings.

The **Adur and Worthing Team** have experienced high demand for carers' support but have effectively managed to deliver person-centred support to our carers, alongside creating high value joint-working opportunities with Adur and Worthing-based partners. This has resulted in two carer Support Groups now being hosted every month across the two districts. Both groups are in partnership with 'Going Local' (the local Social Prescribers' team) and Age UK; attendance is consistently good. Another example of effective partnership which has proved extremely popular is the monthly Carers' Walk with Adur Health Walkers - a monthly seafront 45-minute walk followed by a coffee and a catch up. The team have also been successful in setting up several 'carer clinics' in Worthing and Shoreham in partnership with Worthing Dementia Hub, Mencap and Mind. Each clinic offers three separate appointments each month, enabling carers to access face-to-face support from a Wellbeing Worker. Most months all the slots are booked-up, either by the Locality Team or by the partner involved.

The **Crawley and Mid Sussex Team** have worked with all universal services locally as well as nearly 80 partners to promote our services and increase referrals. The offer has included face-to-face carer groups, drop ins, walks, pamper sessions and a picnic as well as attending partner events and carer awareness training sessions. The team supports the most diverse range of carers in the county. The Bilingual Memory Navigator for carers from the Southeast Asian community has increased awareness of our offer through extensive multi-agency and multi-faith partnership work. The team has also worked with WSCC to provide a formal pathway to support Crawley refugees, which is being developed to further support asylum seekers in the town.

**Our Mental Health Carers' Peer Support Group** continues to be very well attended. The group runs monthly, online and in the evening, has a small core group of carers who attend and is very popular with newly registered carers who appreciate the peer support and guidance from carers in similar situations. Through January to March, 17 unique carers attended with 10-15 carers attending each month. We work very closely with key **mental health partner organisations** on supporting carers who look after family members with severe mental illnesses (SMIs).

#### More in Control – Shelley Caring her Mum with Dementia

Shelley (59) is caring for her mum, 81, living with a dementia condition. Her mum requires emotional as well as physical care. Shelley had registered with our service just before the first lockdown during the pandemic, and like many other carers, was overwhelmed and anxious about the future. Shelley found our support service timely and responsive, and the 1:1 support she received through our Counselling Service made Shelley not feel so alone and gave her a moral boost and confidence to take actions to help her caring situation. Subsequently, Shelley was also able to receive help as part of our pilot 1:1 Carer Coaching offer and has been using coaching techniques in her everyday interactions as a carer. For example, when faced with a challenge now, Shelley approaches it in a different way than before and is more accepting that stress and anxiety are part of the caring role. She now feels more in control over her emotional reactions to such stress or anxiety and accepts that these things are 'normal' and it is okay to feel this. Shelly feels strongly that CSWS has 'held her safe' and 'allowed her 'to speak truthfully, openly and honestly without fear of judgment.'

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

Our **Drug and Alcohol Workers'** Team have been enhanced from December 2022, provide a safe and confidential space where carers feel happy to share their experiences and hear from others in a similar situation through online, face -to-face carers groups, as well as walking groups across the county. During 'Dry January,' the wider team had a presence in the Penguin Foyer of Worthing General Hospital, working with Hospital Wellbeing Staff, engaging with many members of the public and hospital staff.

In support of **Learning Disability (LD) Carers** and following the successful co-produced Carers 'Health All Together (CHAT) Project in 2019, we are working with NHS Sussex and some of the carers involved, to develop the next steps for this project. It was recognised that training for carers as part of 'Be the Voice', at Carers Support West Sussex, has been shown to improve carers' contact with professionals at appointments or meetings related to the person they care for and look after. The training content will be designed by canvassing views from both carers and health professionals, for example, LD carers registered at CSWS and the three LD community teams (Western: Chichester and Bognor, Coastal: Littlehampton, Worthing, and Shoreham, and North: Crawley, Horsham, and Mid Sussex) and one in-patient LD team covering West Sussex.

As part of our work supporting **Young Adult Carers**, we attended five Fresher's Fairs throughout September, reaching hundreds of students, to connect with them and raise carer awareness as they start their first year of college or university. We handed out over 250 Carers Support To-Do List Planners and, following the Fresher's Fairs, Carers Support will feature on Chichester University Student Wall Planner, the university's social media and have Carers Support posters around campus. We delivered Carer Awareness training to the four colleges in the Chichester College Group (Chichester, Crawley, Worthing, and Haywards Heath). The sessions were delivered to 41 student wellbeing staff members.

Since autumn 2021, CSWS has worked together with West Sussex County Council **Young Carers'** Team and Sussex Clubs for Young People to provide young carers with regular YC clubs for 11+ year olds and holiday activities for those aged 7-11 years. During 22/23 we facilitated 233 groups with 2,348 attendances from young carers. The attendance at the groups and activities had a 100% increase by the end of March 2023. We have been successful in getting additional grant funding to support the partnership with over £44K raised which has been allocated to support the continuation of the partnership until March 2024.

The **Carers' Assessment Team** have been working closely with WSCC for the re-design of Adult Social Care Assessments and processes in West Sussex (Practice and Systems Programme – PAS) which went live in April 2023. The team also ensure that when Carer Assessments have been carried out, the team working with the cared-for person are informed, and any pertinent information is passed on to foster a 'joined-up' approach.

As well as being co-located in the four acute hospitals and attending Multidisciplinary Team Meeting and ward huddles, the **Hospital Team** have delivered carer awareness raising sessions to over 1,200 health and social care colleagues.

### 3.7 Strategic Aim: Be consistent and Creative.

**Specific Objective:** Create and sustain the internal capacity we need to deliver consistent and quality services, whilst exploring opportunities and potential.

Every year we add value to the Health and Social Care funding we are allocated as part of the agreement to support carers.

On fundraising we continue to grow our activity and this year the team have worked with WSCC and NHS Sussex, received over £800K in grants for new projects and services, is working with statutory partners and on grants from trusts and foundations.

**Making a difference in hospitals** Junior Sister feedback: *'Having the unpaid carer present in the patients' hospital journey is useful to the Nursing and Discharge Coordinating Team. It allows us to really grasp the needs of the patient early on, which allows us to put them on a correct pathway to facilitate a supported discharge and minimises the guess work in care. Especially helpful where patients are unable to advocate for themselves.'*

73% of our carers reported feeling supported to manage their caring role during and following a hospital stay. With 42% feeling empowered with information and support to engage with MHS staff and discharge planning.

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

During the year we secured funding for and set up six new projects, below are some of our new services and activities:

- The Check in and Chat Telephone Befriending Service forms part of our Connecting Carers' Service. Carers are matched with volunteers who will make regular social calls with them, 56 carers were supported by 19 volunteers with 21,616 minutes of call time.
- Dementia Navigator Service supported 188 dementia carers - 871 phone calls with carers, looking at personalised support for them and the person they care for.
- We have been working with carers using the Carer's Star (TM) <https://www.outcomesstar.org.uk/using-the-star/see-the-stars/carers-star/>, which looks at seven key outcome areas of a carer's life. 1,461 carers participated in use of the Carer's Star and 87% of carers reported an improvement in one or more outcomes. Overall carers' outcomes were improved following support from our teams.
- The role of the Bilingual Memory Navigator is supporting more than 50 carers either through a pre-diagnosis of dementia and/or post-care. With the aim of bridging the gap between the professionals involved in the care of the person living with dementia and those family members who look after and support the person. There have been enquiries from 120 carers, who do not wish to register due to cultural reasons.

### 4. Ongoing impacts of the COVID-19 Pandemic and Cost of Living

During 2022/23 the CSWS team continued to support carers through the impacts of COVID-19 helping them to access vaccines and get much needed guidance and practical help with health and social care, especially during winter pressures.

Our Sussex-wide winter campaign was led by the CSWS team and looked to address carer concerns/obstacles by supplying points of relevant information, support, and guidance. The ask was simply encouraging carers to connect with carer organisations in their locality. Post-campaign analysis revealed some interesting statistics.

Year-on-year percentage increases during the campaign were reported as follows:

- +59% increase in website users
- +64% increase of new users to websites
- +8% increase in calls to phone lines
- +17% increase in new carer registrations
- +47% increase in numbers of carers accessing financial support services
- +63% increase in number of respite referrals
- +22% increase in Carer Discount Card subscriptions
- +39% increase of professional referrals to carer services

Carers describe their circumstance in the last year as being 'crushing,' they describe not even being able to afford the essentials. In November 2022, our national partner Carers Trust published results from 2,675 family carers surveyed, one in seven (14%) unpaid family carers were now using food banks because of soaring living costs. Here in West Sussex carers have told us that these are the impacts of the rise in cost of living:

- Spending less on non-essential items
- Cutting back on socialising and leisure activities
- Using less fuel (gas or electricity)
- Applying for benefits, grants, or funds (i.e., Household Support Funds or Universal Credit)
- Cutting back on respite or break from caring role
- Using credit, overdraft or taking a loan

*"I worry about rising energy costs because due to my son's needs, I have the heating on often, bath him every day and need to do washing every day. I go without showers and wear my clothes more before washing them to try to balance the budget." Unpaid carer responding to Carers Support West Sussex Survey April 2023.*

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

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What we do with and for carers does not resolve all the big issues, but it does help in some way to share the burden. In the last year we have given out over £1.3 million in small grants to support carers who are in hardship, to support their wellbeing and/or free equipment to make their lives as carers a bit easier. Plus, our new team of Benefits' Advisers for carers helped carers claim more than £1m in previously unclaimed benefits.

#### 5. Public Benefit

The Trustees have referred to the direction contained in the Charity Commission's general guidance on public benefit when reviewing aims and objectives and in planning the Charity's future activities. The Trustees consider that the Charity's activities reflect its aims and objectives and that they are designed to provide accessible services and activities that benefit the appropriate sector of the public in accordance with our charitable objectives.

#### 6. Statement Regarding Fundraising

The Charity raises funds primarily through Grants and Trust fundraising. Fundraising activity is reported to the Finance and Risk Committee which is a subcommittee of the Board, and the Fundraising Policy is monitored annually. The Charity is registered with the Fundraising Regulator, has a Fundraising Policy, and has not received any complaints relating to fundraising during the year.

#### 7. Remuneration Policy

The approach to the remuneration of all employees is to endeavour to offer fair and competitive levels of pay as are affordable within our means so that our charitable objectives can be delivered. The rates of pay shall be proportionate to the complexity and responsibilities of each role.

The key principles for deciding the pay and reward of the employees of the Charity is:

- that every employee is different, so we recognise that their needs and their motivations are different
- attaining equity and objectivity in setting levels of compensation
- maintaining responsible financial management to enable payments to be made
- having a strong governance structure to ensure that employee remuneration is managed in line with best practice.

The Charity seeks to be fair in remunerating at both the higher and lower ends of the pay scale, and the appropriateness of pay will be considered in the context of achieving the aims of our Charity and the efficient delivery of services to meet the needs of our beneficiaries. In this regard, the Charity undertook a salary benchmarking exercise in December 2022 with the aim of ensuring that the principles underlying the organisation's pay and rewards were honoured.

#### 8. Contribution Made by volunteers

The Volunteer Service has continued throughout 2022-23 to support our carers through CSWS services and new projects, delivering 146,704 hours from 72 volunteers.

The volunteer-supported Check-in & Chat Telephone Befriending Service continues to provide vital, personalised support to individuals, many of whom remain isolated by the demands of their caring role. As has previously been the case, referrals to support carers of people living with dementia continue to outweigh those from other categories.

During the year 18 Check-in & Chat volunteers connected with 56 carers.

Volunteer feedback:

*'One of the best things I've ever experienced. Volunteering has offered me so much more than I could have imagined. The Check In and Chat Service is such a necessary and valuable support. In my experience so far, the people I speak to say they get so much from it and it was a surprise to me how much I get from it. Speaking with people who are caring for their loved ones enables them to have a safe space to offload if they choose to, all their feelings and thoughts to someone who they sense "gets it" and isn't going to judge them. Before becoming a volunteer, I used this service and it helped me from feeling hopeless and helpless to hopeful and helpful. I'm now able to support other people to feel less isolated and more validated. My caring journey had me very nearly broken and this service turned a lot of things around for me. I am very grateful to receive the support and I am very grateful to be able to offer support. Volunteering has been the light at the end of my tunnel. If it wasn't for my caring role, I would never have discovered this invaluable, necessary service. Every cloud has a silver lining and Carers support has been the silver lining in my personal carer's journey.'*

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

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#### **New Carer Wellbeing Support Programme**

One of our wonderful volunteers created and delivered this online programme to our carers. These sixteen sessions each two hours in length introduced the concept of coaching, increased self-awareness, self-confidence and resilience for the carers involved.

Crawley Community Shop volunteers raised £1,480.98 to be used for CSWS Crawley services. Digital Champions have helped 43 carers and 13 volunteer group co-facilitators continue to support online and in-person groups across the localities. The volunteer Counselling Service's 31 Counsellors provided support sessions to 294 carers, which was 2,179 hours of counselling.

#### **9. Diversity, Equality, and Inclusion (DEI)**

The Trustees have an annual review of Diversity, Equality, and Inclusion, have made a commitment to the ACEVO Leadership principles on diversity and agree an annual DEI plan with carers and the workforce.

At the end of March of **carers** registered during the financial year, 7.7% of the carers we supported were from ethnic minority communities (compared to 4.9% in 21/22).

We use translation facilities for all our services and activities and the option is included on our website. During 2022 we had 66,360 visits to the site and of those 99% used English as the browser language: the top six translated languages were Korean (107), Polish (76), Spanish (63), Castalian (52), Russian (47), Chinese (44). In 2023 we will review the data to identify any changes to create more learning for the future. At present Carers UK estimates that one in ten carers has an ethnic minority background.

#### **Workforce Survey from June 2022:**

50% of the workforce are over the age of 55, with 29% being 45-54 years and 19% 25-34; there has been a shift from the previous year's figures to a younger age group; 67% identify as female, a change from last year which was 90%; 9% identify as LGBT+.

For our staff team 3.9% were from an ethnic minority background, 6.5% from another white background, with volunteers 100% from white background (from our monitoring 8% are from ethnic minority backgrounds) 9% as living with a disability – this has given us a more diverse picture than last year. As reported previously 62% of staff members identify as being a carer and of those caring for a parent (44%) being the largest category.

The 2023/24 DEI plan for the Charity has the following commitments:

- Continue action to tackle racial diversity and inclusion.
- Continue action to tackle unconscious bias and celebrate diversity on our workforce and for and with the carers we support.
- Develop and empower the workforce through strengthening *Leadership and Learning*.
- Continue the "Making Carers Count" programme through identification and support for and with carers from under-represented groups.

Trustees monitor activity with the CSWS on all these commitments through monthly and quarterly Carer Services and HR Reports.

#### **10 Financial Review**

The Charity's main activities arise under a contract with West Sussex County Council (WSCC) to provide universal carer services across West Sussex. The contract, funded from the Council's prevention funds, will be in place until March 2024. The Charity continues to work to grow its own earned income through fundraising and income generation activities.

Net incoming resources for the year 2022/23 (being the difference between total net income and expenditure across individual funds) totalled £28,474 (2022: £14,305) as shown on the Statement of Financial Activities on page 20 of the accounts.



# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

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Total unrestricted income increased by approximately 7% compared to the previous year, mainly due to additional income received in respect of the Charity's charitable activities. Expenditure on charitable activities (excluding grant funded expenditure from restricted funds and depreciation and impairment) also increased by approximately 8%, largely as a result of additional staff and other operating costs incurred in meeting activity demands. The overall result for the year reflects the work undertaken by the Trustees and Leadership Team to generate more income and reduce charitable overheads wherever possible.

Restricted income has increased by 134% compared to the previous year and this is mirrored by the increase in restricted expenditure which has increased by 137% on the previous year, these increases are mainly due to the receipt and payment out of the carer hardship and wellbeing grants.

During the year, and in line with its strategic priorities, the Charity continued with its on-going investment to support its charitable activities and contract with WSCC. As part of that strategy, the Board has agreed in its budget for 2023/24 to provide additional funding from reserves to enhance activity in learning and development, and Marketing and Communications.

The Trustees continue to be aware of the funding pressures facing the charitable sector and local government, noting particularly the increasing financial impact of inflation. It is recognised that the same levels of funding cannot be assumed in the longer term and, accordingly, the Trustees have set strategic priorities for fundraising and income generation activities. The Directors and Charity team keep up-to-date on government policy in relation to potential cuts to local authority and health funding and other organisational risks.

The Charity is holding unrestricted reserves including designated funds totalling £1,069,982 as at 31 March 2023 (2022: £1,169,652). In addition to reviewing the purposes for which funds have previously been designated, additional funds have been allocated for essential priorities, projects, or services as agreed by the Finance and Risk Committee and main Board.

The Charity also holds restricted fund balances totalling £479,253 at 31 March 2023 (2022: £351,111 which are held for the purposes of the particular contract service. These funds do not form part of the Charity's unrestricted reserves.

#### 10.1 Principal Funding Sources

The principal funding sources for the Charity are as follows:

- Grants and contracts from West Sussex County Council (WSCC) as part of a service level agreement\*
- Contracts for services and activities
- Grants from trusts and foundations
- Donations and income through fundraising

\* CSWS has an Agreement with WSCC to provide a county-wide Carers Information, Advice, Assessment and Support service through a range of methods and settings that work for and with the carer population of the county. The activity, outcomes and expectations are clearly stated within the Agreement.

The Charity submits monthly and quarterly reports against agreed Key Performance Indicators (KPIs) and carer outcomes to WSCC. Case studies are submitted monthly to enhance the understanding of how the Charity's team supports carers.

#### 11 Reserves

"The Trustees have considered the provisions of the Charity Commission's guidance 'Charity Reserves: Building Resilience' (CC19, September 2018) in setting the Reserves' Policy for the Charity. The Board has determined that there is a need for sufficient reserves to secure the organisation's viability beyond the immediate future to provide reliable services and funding over the longer term and to absorb financial setbacks, while acknowledging the vulnerability of our client group and the nature of the services we offer.

The Trustees have used the organisation's Risk Register to inform its Reserves' Policy and to focus on key financial risks in respect of income, expenditure, any on-going effects from the pandemic, the receipt and use of restricted income, and where funds can only be realised by the disposal of fixed assets.

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

The Charity's Reserves' Policy is to maintain an adequate level of reserves to enable normal operating activities to continue over a period of approximately three to six months in the event that the contract with WSCC should conclude without renewal, and to allow the Charity to continue for a period of twelve months after the conclusion of the contract with WSCC, should a shortfall of income occur and to take account of potential risks and contingencies that may arise from time to time.

The potential contingencies identified by the Board include:

- Meeting contractual liabilities should the organisation have to reduce activity or close, including redundancy and notice payments, amounts due to creditors and contractual commitments.
- Covering unexpected costs like the breakdown of essential office equipment, staff cover for illness, maternity leave and parental leave, and legal costs defending the Charity's interests.
- Replacing equipment as it wears out.
- Provide working capital when funding is paid in arrears.

#### 12. Designated Funds

During the year, the Charity reviewed the purposes for which funds had been previously designated. The organisation has previously invested its reserves in supporting the main contract with West Sussex County Council (e.g., through the designation of funds to meet the cost of a replacement for the previous client database which came into operation in July 2020), and certain other operational costs (e.g., through governance support), as well as using funds for fundraising and development activity (e.g. the introduction of a new Finance Business Partnering model).

Additional amounts were also set aside during the year to allow for the Charity to set its overall strategy for the next five years. In April 2022, the Board approved proposals to make use of the Charity's unrestricted funds to support and enhance activity across a number of different headings, including investment in a new website, further learning and development across the organisation and enhanced Marketing and Communications support for our locality teams.

#### 13. Investment Policy

It is the Charity's policy to invest surplus funds into interest bearing deposits. The Finance and Risk Committee Trustees developed a new Investment Strategy and Policy which was approved by the Board on 27.10.22 and includes:

- making recommendations to the Board for approval of long-term investments
- scrutinizing long-term investment asset performance and providing quarterly reports to the Board
- receiving reports from management on short-term investments and providing regular updates to the Board on performance
- ensuring bank mandates are maintained
- ensuring effective controls, processes and procedures are in place to manage and protect the Charity's long-term and short-term assets.

CSWS is committed to ensuring prompt payment of staff, suppliers, and grants to carers. Balances on the nominated main bank account should be kept at the minimum required for liabilities to be met as they fall due and to avoid delays in grant making activities.

Liquidity requirements are derived from a 12-month cash flow forecast which determine the level of cash to be held in instant access accounts and notice/term accounts. Notice and term accounts do not exceed 12 months. The cash forecast is reviewed monthly.

#### 14. Risk Management

The Trustees perform a detailed review of all the major strategic, business, and operational risks that the Charity faces and confirm that necessary steps are taken to lessen the risks identified.

The Charity has continued to use the Risk Tool from NCVO throughout 2022/23 to help identify the key risks facing the Charity, and steps to mitigate those risks are reviewed by the Finance and Risk Committee and the Board regularly, at least quarterly. Risks have been considered in five thematic areas:

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

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- Governance;
- External;
- Regulatory and Compliance;
- Financial; and
- Operational.

The key risk identified is dependence on contract income from WSCC. The Charity is taking steps to mitigate this risk by continuing to provide support and assistance to carers while sustaining the Charity's strong position as a "business critical provider" with and for the local health and social care economy.

#### 15. Structure, Governance and Management

##### 15.1 Governing Document

The Company was founded under a Memorandum of Association which established the objects and powers of the charitable Company and is governed under its Articles of Association. The Board formally adopted revised Articles of Association on 3 December 2015. In the event of the company being wound up members are required to contribute an amount not exceeding £10. During 2021 the Trustees/Directors reviewed the governing document, agreed an addendum in 2022 to clarify Trustee tenure and then undertake a further review once the Charities Act 2022 is adopted.

##### 15.2 Recruitment and Appointment of Board Members

The Directors of the Company are also Charity Trustees for the purpose of charity law and under the Company's Articles are known as members of the Board. Under the requirements of the Memorandum and Articles of Association the Charity shall have a Board of Directors comprising at least three persons.

The Charity's purpose and work is focused on supporting carers across West Sussex and consequently the Board of Directors seek to ensure that the needs of this group are appropriately reflected through the diversity of the Board which is made up of people from across the county to reflect and represent the rural/urban dynamic of the district.

Business and financial skills are well represented on the Board. In an effort to maintain its broad skill mix, the Board of Directors are requested to provide a list of their skills (and update it each year). In the event of skills being lost due to resignation or retirements, new Board members are sought to plug the skills' gap.

In January 2023 the Board began a recruitment drive for five new Trustees working with Reach Trustee Works and local networks. Trustee Works reached out to over 75 potential candidates as well as promotions through social media and other local and national recruitment sites.

We had a greater than anticipated response and were able to recruit Trustee colleagues with HR, Digital, Health and Social Care, business and marketing experience.

##### 15.3 Board Members' Induction and Training

A comprehensive Induction and Trustee Handbook are provided to new Trustees, and training is available via Carers Trust and NCVO nationally, and locally via the Council for Voluntary Services, as well as regular written and face-to-face updates for and with the Charity team.

##### 15.4 Organisational Structure

The Carers Support West Sussex Board of Trustees/Directors meets at least five times a year and is responsible for the strategic direction and policy of the Charity. At the year end the Board had members from a variety of professional backgrounds relevant to the work of the Charity.

A scheme of delegation is in place and day-to-day responsibility for the Charity's operations rests with the Chief Executive Officer working with the Leadership Team. The average monthly number of staff members employed by the Charity for the year was 119, supported by 72 volunteers.



# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

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#### 16. Future Plans

The Carers Support West Sussex Team of staff and volunteers are proud to work in an organisation which is constantly listening to, communicating, and working with carers who live and work in this glorious county of West Sussex.

The inclusive nature and levels of integrity expressed by our staff and volunteers never fails to impress. With 99% of carers surveyed saying they were satisfied with the support received from carers support, I am reassured we are meeting carers where they are at.

**Pressures:** From April 2023 we started the final year of our current Contract (awarded April 2017). A carer engagement exercise is underway, and we have feedback from 777 carers through our survey and a further six focus groups. The information gathered from carers will inform some of the thinking around the new contract for both the Commissioner and CSWS governance. Our services are complex, not only is the core contract a broad offer for carers, but we have been successful in achieving additional funding for several projects to better support carers – e.g., the Welfare Benefits' Service, the Primary Care Project and the Making Carers Count Programme, in addition to several smaller localised projects.

There has been pressure for our services throughout the year; 2022/23 has seen a consistent increase in demand for all our services and is mirrored by the experience of our partners in the voluntary and statutory sectors. Our Contract suggests we should identify and register 250 new carers each month. However, this number was consistently around 330 carers per month, but since the start of 2022 that number has been higher and has reached over 400 new carers registered each month.

**Opportunities:** the new year saw the start of a new Sussex Health and Care funded Primary Care Project to better support carers who access support through GP practices and primary care settings.

We continued to be consistent as well as creative in everything we did during 2022/23 and to amplify this, our Response Line Team were assessed in over 12 quality standards and awarded the Helplines Standard <https://www.helplines.org/> in early 2023. After the year end, we have been reaccredited for our Trusted Charity Mark, which is assessed against 11 quality indicators for charities.

As the financial year ended the Trustees for the Charity invested in a new website starting in October 2022 with all user engagement led by our Carer Voice Network and a cross organisation staff and volunteer team. The Trustees also supported an Individual Giving Project to raise funds for young carers, an enhanced Learning and Development Programme for all our employee teams, and enhanced Marketing and Communications support for our locality teams.

Finally, and as last year, we will work with partners on the cost-of-living crisis identifying collectively how to support people who are most in need. The CSWS team will continue to deliver hardship funding for carers and provide our carer Benefits' Service, plus this year deliver a new programme to support carers who are refugees or asylum seekers.

Most Important to carers from our Carer Engagement Survey in April/May 2023:

On a scale of 1 to 5 (with 1 not anxious at all), carers scored an average rating of 3.24 in being anxious in their ability to continue in a caring role.

On a scale of 1 to 5 (with 1 not at all important), carers scored an average rating of 4.02 in importance to being able to talk to someone to get information and support with their caring role.

On a scale to 1 to 5 (with 1 very unlikely), carers scored an average rating of 2.93 in how likely they were to use more interactive tools on the website, which would direct them to information and support relevant to their caring role.

# CARERS SUPPORT WEST SUSSEX

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) *FOR THE YEAR ENDED 31 MARCH 2023*

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### 17. Declarations

The Company has taken advantage of the small companies' exemption in preparing the report above. The Trustees declare that they have approved the Trustees' report (including Directors' report) above.

Signed on behalf of the Charity's Trustees/Directors



Neal Young Chair of Trustees  
Date: 26 October 2023

# **CARERS SUPPORT WEST SUSSEX**

## **STATEMENT OF TRUSTEES' RESPONSIBILITIES**

### ***FOR THE YEAR ENDED 31 MARCH 2023***

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The Trustees, who are also the directors of Carers Support West Sussex for the purpose of company law, are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

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

Each of the Trustees has confirmed that there is no information of which they are aware which is relevant to the audit, but of which the auditor is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

# CARERS SUPPORT WEST SUSSEX

## INDEPENDENT AUDITOR'S REPORT

### TO THE TRUSTEES OF CARERS SUPPORT WEST SUSSEX

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#### Opinion

We have audited the financial statements of Carers Support West Sussex (the 'charitable company') for the year ended 31 March 2023 which comprise the statement of financial activities, the balance sheet, the statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2023 and of its incoming resources and application of resources, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

#### Basis for opinion

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

#### Conclusions relating to going concern

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

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

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

#### Other information

The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. The Trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

#### Matters on which we are required to report by exception

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

- the information given in the financial statements is inconsistent in any material respect with the Trustees' report; or
- sufficient accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records; or
- we have not received all the information and explanations we require for our audit.

# CARERS SUPPORT WEST SUSSEX

## INDEPENDENT AUDITOR'S REPORT (CONTINUED)

### TO THE TRUSTEES OF CARERS SUPPORT WEST SUSSEX

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#### **Responsibilities of Trustees**

As explained more fully in the statement of Trustees' responsibilities, the Trustees, who are also the directors of the charitable company for the purpose of company law, are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the Trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error. In preparing the financial statements, the Trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

#### **Auditor's responsibilities for the audit of the financial statements**

We have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with the Act and relevant regulations made or having effect thereunder.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. The objectives of our audit are to obtain sufficient appropriate audit evidence regarding compliance with laws and regulations that have a direct effect on the determination of material amounts and disclosures in the financial statements, to perform audit procedures to help identify instances of non-compliance with other laws and regulations that may have a material effect on the financial statements, and to respond appropriately to identified or suspected non-compliance with laws and regulations identified during the audit.

In relation to fraud, the objectives of our audit are to identify and assess the risk of material misstatement of the financial statements due to fraud, to obtain sufficient appropriate audit evidence regarding the assessed risks of material misstatements due to fraud through designing and implementing appropriate responses and to respond appropriately to fraud or suspected fraud identified during the audit.

However it is the primary responsibility of management, with the oversight of those charged with governance, to ensure that the entity's operations are conducted in accordance with the provisions of laws and regulations and for the prevention and detection of fraud.

In identifying and assessing the risks of material misstatement in respect of irregularities, including fraud, the audit engagement team made enquiries of management, and those charged with governance, regarding the procedures relating to identifying, evaluating and complying with;

1. laws and regulations and whether they were aware of any instances of non-compliance;
2. detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected or alleged fraud;
3. the internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations;

As a result of these procedures we consider the most significant laws and regulations that have a direct impact on the financial statements are FRS 102, General Data Protection Regulations, Companies Act, Charities Act 2011, Charities Statement of Recommended Practice and employment law and regulations. We performed audit procedures to detect non-compliance, which may have a material impact on the financial statements. These included reviewing financial statement disclosures and evaluating advice received from external advisors. There were no significant laws and regulations we deemed as having an indirect impact on the financial statements.

# CARERS SUPPORT WEST SUSSEX

## INDEPENDENT AUDITOR'S REPORT (CONTINUED)

### TO THE TRUSTEES OF CARERS SUPPORT WEST SUSSEX

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The audit engagement team identified the risk of management override of controls as the area where the financial statements were most susceptible to material misstatement due to fraud. Audit procedures performed included but were not limited to testing manual journal entries and other adjustments and evaluating the rationale in relation to any significant, unusual transactions and transactions entered into outside of the normal course of business.

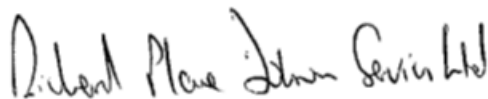
As a large portion of income is received through grants and relates to future years, the audit engagement team have highlighted completeness of income as an area of significant risk. Audit procedures performed included but were not limited to, proof in total testing of income recorded in the accounts compared to the grant awarded per the grant contract.

Another area of significant risk identified by the audit engagement team was the valuation of Computer Equipment, which includes the CRM system. The amortisation rate set is highly subjective. Audit procedures performed included agreeing invoices to additions in the year and recalculating the amortisation charged, as well as confirming that the assets were not impaired.

A further description of our responsibilities is available on the Financial Reporting Council's website at: <https://www.frc.org.uk/auditorsresponsibilities>. This description forms part of our auditor's report.

#### Use of our report

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



**Richard Place Dobson Services Limited**

**Chartered Accountants**

**Statutory Auditor**

20 November 2023

Ground Floor  
1 - 7 Station Road  
Crawley  
West Sussex  
RH10 1HT

Richard Place Dobson Services Limited is eligible for appointment as auditor of the charitable company by virtue of its eligibility for appointment as auditor of a company under section 1212 of the Companies Act 2006.

# CARERS SUPPORT WEST SUSSEX

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

**FOR THE YEAR ENDED 31 MARCH 2023**

### Current financial year

		Unrestricted funds general 2023	Unrestricted funds designated 2023	Restricted funds 2023	Total 2023	Total 2022
	Notes	£	£	£	£	£
<b><u>Income and endowments from:</u></b>						
Donations, grants and gifts	3	9,935	-	38,695	48,630	25,817
Charitable activities	4	2,647,101	-	2,292,460	4,939,561	3,506,443
Investments	5	11,838	-	-	11,838	6,686
Other income	6	38,721	-	-	38,721	20,624
<b>Total income</b>		<b>2,707,595</b>	<b>-</b>	<b>2,331,155</b>	<b>5,038,750</b>	<b>3,559,570</b>
<b><u>Expenditure on:</u></b>						
Raising funds	7	-	28,600	14,025	42,625	35,325
Charitable activities	8	2,611,612	209,783	2,146,258	4,967,653	3,509,940
<b>Total expenditure</b>		<b>2,611,612</b>	<b>238,383</b>	<b>2,160,283</b>	<b>5,010,278</b>	<b>3,545,265</b>
<b>Net incoming resources before transfers</b>		<b>95,983</b>	<b>(238,383)</b>	<b>170,872</b>	<b>28,472</b>	<b>14,305</b>
Gross transfers between funds		(220,428)	263,158	(42,730)	-	-
<b>Net (expenditure)/income for the year/ Net movement in funds</b>		<b>(124,445)</b>	<b>24,775</b>	<b>128,142</b>	<b>28,472</b>	<b>14,305</b>
Fund balances at 1 April 2022		1,063,092	106,560	351,111	1,520,763	1,506,458
<b>Fund balances at 31 March 2023</b>		<b>938,647</b>	<b>131,335</b>	<b>479,253</b>	<b>1,549,235</b>	<b>1,520,763</b>

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# CARERS SUPPORT WEST SUSSEX

## STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED) INCLUDING INCOME AND EXPENDITURE ACCOUNT

**FOR THE YEAR ENDED 31 MARCH 2023**

Prior financial year

		Unrestricted funds general 2022 £	Unrestricted funds designated 2022 £	Restricted funds 2022 £	Total 2022 £
	Notes				
<b><u>Income and endowments from:</u></b>					
Donations, grants and gifts	3	14,112	-	11,705	25,817
Charitable activities	4	2,521,375	-	985,068	3,506,443
Investments	5	6,686	-	-	6,686
Other income	6	20,624	-	-	20,624
<b>Total income</b>		<u>2,562,797</u>	<u>-</u>	<u>996,773</u>	<u>3,559,570</u>
<b><u>Expenditure on:</u></b>					
Raising funds	7	-	26,275	9,050	35,325
Charitable activities	8	2,467,330	153,518	889,092	3,509,940
<b>Total expenditure</b>		<u>2,467,330</u>	<u>179,793</u>	<u>898,142</u>	<u>3,545,265</u>
<b>Net incoming resources before transfers</b>		95,467	(179,793)	98,631	14,305
Gross transfers between funds		(3,694)	31,203	(27,509)	-
<b>Net (expenditure)/income for the year/ Net movement in funds</b>		91,773	(148,590)	71,122	14,305
Fund balances at 1 April 2021		971,319	255,150	279,989	1,506,458
<b>Fund balances at 31 March 2022</b>		<u>1,063,092</u>	<u>106,560</u>	<u>351,111</u>	<u>1,520,763</u>



# CARERS SUPPORT WEST SUSSEX

## BALANCE SHEET

AS AT 31 MARCH 2023

	Notes	2023 £	£	2022 £	£
<b>Fixed assets</b>					
Tangible assets	15		136,722		169,692
<b>Current assets</b>					
Debtors	16	77,112		479,547	
Cash at bank and in hand		1,959,399		1,805,869	
		2,036,511		2,285,416	
<b>Creditors: amounts falling due within one year</b>	17	(623,998)		(934,345)	
Net current assets			1,412,513		1,351,071
<b>Total assets less current liabilities</b>			1,549,235		1,520,763
<b>Income funds</b>					
Restricted funds	18		479,253		351,111
<u>Unrestricted funds</u>					
Designated funds	19	131,335		106,560	
General unrestricted funds		938,647		1,063,092	
			1,069,982		1,169,652
			1,549,235		1,520,763

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2023, although an audit has been carried out under section 144 of the Charities Act 2011.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements under the requirements of the Companies Act 2006, for the year in question in accordance with section 476.

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

The financial statements were approved by the Trustees on ...26 October 2023.....



N Young  
Trustee

Company registration number 06418743

# CARERS SUPPORT WEST SUSSEX

## STATEMENT OF CASH FLOWS

**FOR THE YEAR ENDED 31 MARCH 2023**

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	Notes	2023 £	£	2022 £	£
<b>Cash flows from operating activities</b>					
Cash generated from operations	22		141,392		335,123
<b>Investing activities</b>					
Purchase of tangible fixed assets		-		(17,150)	
Proceeds on disposal of tangible fixed assets		300		-	
Investment income received		11,838		6,686	
<b>Net cash generated from/(used in) investing activities</b>			12,138		(10,464)
<b>Net cash used in financing activities</b>			-		-
<b>Net increase in cash and cash equivalents</b>			153,530		324,659
Cash and cash equivalents at beginning of year			1,805,869		1,481,210
<b>Cash and cash equivalents at end of year</b>			1,959,399		1,805,869

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# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS

### *FOR THE YEAR ENDED 31 MARCH 2023*

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#### **1 Accounting policies**

##### **Charity information**

Carers Support West Sussex is a private company limited by guarantee incorporated in England and Wales. The registered office is The Orchard, 1-2 Gleneagles Court, Brighton Road, Crawley, West Sussex, RH10 6AD.

##### **1.1 Accounting convention**

The financial statements have been prepared in accordance with the charitable company's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)". The charitable company is a Public Benefit Entity as defined by FRS 102.

The financial statements are prepared in sterling, which is the functional currency of the charitable company. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention.

##### **1.2 Going concern**

At the time of approving the financial statements, the Trustees have a reasonable expectation that the charitable company has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

##### **1.3 Charitable funds**

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Designated funds comprise funds which have been set aside at the discretion of the Trustees for specific purposes. The purposes and uses of the designated funds are set out in the notes to the financial statements.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

##### **1.4 Income**

All income is recognised in the Statement of Financial Activities once the charitable company has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably. The following specific policies apply to particular categories of income:

Donations, grants and gifts are included in full in the Statement of Financial Activities once receivable.

Contract income is recognised as the charity becomes entitled to the contract income (i.e. over the term of the contract).

Investment income is recognised in the financial statements when receivable.

##### **1.5 Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Support costs are all allocated to the one charitable activity. Support costs include premises' expenditure and office running costs.

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

---

#### 1 Accounting policies

(Continued)

Charitable expenditure comprises those costs incurred by the charitable company in pursuit of its charitable objectives. It includes both direct costs and support costs relating to such activities. Support costs, including salaries, are apportioned on the basis of the time involved on the activity.

Grants payable are recognised when the charitable company becomes obliged to pay the grant, the amount of the grant can be accurately quantified and when it becomes probable that the grant will be paid.

Support costs include governance costs, which are the costs associated with meeting the statutory requirements of the charitable company and include its audit fees and costs linked to strategic management of the charitable company.

Grants offered subject to conditions which have not been met at the year end date are noted as a commitment but not accrued as expenditure.

#### 1.6 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Amortisation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Computer software	10 years straight line
-------------------	------------------------

#### 1.7 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Computers and VOIP system	20% on cost
Office Equipment	20% on cost
CRM System	10% on cost

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

The Trustees have set a capitalisation policy of £2,500. Assets purchased below this value are not capitalised unless they are part of a bigger project.

#### 1.8 Impairment of fixed assets

At each reporting end date, the charitable company reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

#### 1.9 Cash and cash equivalents

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

#### 1.10 Financial instruments

The charitable company only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

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#### 1 Accounting policies

(Continued)

##### 1.11 Taxation

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

##### 1.12 Employee benefits

The costs of short-term employee benefits are recognised as a liability and an expense.

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

##### 1.13 Retirement benefits

Retirement benefits to employees of the entity are provided by a defined contribution scheme and a Local Government Pension Scheme (LGPS), which is a defined benefit scheme. The assets of both schemes are held separately from those of the entity.

The contributions made in relation to the defined contribution scheme are charged in the accounts as they become payable in accordance with the rules of the scheme.

The LGPS is a funded scheme and the assets are held separately from those of the entity in separate trustee administered funds. Pension scheme assets are measured at fair value and liabilities are measured on an actuarial basis using the projected unit method and discounted at a rate equivalent to the current rate of return on a high quality corporate bond of equivalent term and currency to the liabilities. The actuarial valuations are obtained at least triennially and are updated at each balance sheet date. However, Carers Support West Sussex is counted as a pass through employer for the purpose of their share of benefits in the LGPS and as such it is unable to identify its share of the underlying assets and liabilities of the scheme on a consistent and reasonable basis. This is therefore treated as a defined contribution scheme and the contributions are recognised as they are paid each year.

##### 1.14 Leases

Rentals payable under operating leases, including any lease incentives received, are charged as an expense on a straight line basis over the term of the relevant lease.

##### 1.15 Debtors

Trade and other debtors are recognised at the settlement amount due after any discounts offered.

Prepayments are valued at the amount prepaid net of any discounts due.

##### 1.16 Creditors and provisions

Creditors and provisions are recognised where the charitable company has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably.

##### 1.17 Winding up or dissolution of the charitable company

If upon winding up or dissolution of the charitable company there remain any assets, after the satisfaction of all debts and liabilities, the assets represented by the accumulated fund shall be transferred to some other charitable body or bodies having similar objects to the charity.

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

#### 2 Critical accounting estimates and judgements

In the application of the charitable company's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

The main judgement and accounting estimates included in the accounts are:

Amortisation of computer software - Management have estimated that the useful life of the computer software is 5 years

Valuing Volunteer time - No amount is included in the accounts in respect of volunteer time on the basis that it is not possible to place an accurate figure on the cost of time donated by volunteers.

#### 3 Donations, grants and gifts

	Unrestricted funds general 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds general 2022 £	Restricted funds 2022 £	Total 2022 £
Donations, grants and gifts	9,935	38,695	48,630	14,112	11,705	25,817

#### 4 Charitable activities

	Contract income 2023 £	Contract income 2022 £
Contract income	4,939,561	3,506,443
Analysis by fund		
Unrestricted funds - general	2,647,101	2,521,375
Restricted funds	2,292,460	985,068
	4,939,561	3,506,443

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 5 Investments

	Unrestricted funds general 2023 £	Unrestricted funds general 2022 £
Interest receivable	11,838	6,686

### 6 Other income

	Unrestricted funds general 2023 £	Unrestricted funds general 2022 £
Other income	38,721	20,624

### 7 Raising funds

	Unrestricted funds designated 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds designated 2022 £	Restricted funds 2022 £	Total 2022
<u>Fundraising and publicity</u>						
Staff costs	28,600	14,025	42,625	26,275	9,050	35,325
	<u>28,600</u>	<u>14,025</u>	<u>42,625</u>	<u>26,275</u>	<u>9,050</u>	<u>35,325</u>

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 8 Charitable activities

	Direct activities	Grant funding of activities	Premises expenditure	Office running costs	Total	Total
	2023 £	2023 £	2023 £	2023 £	2023 £	2022 £
Staff costs	2,497,521	-	-	-	2,497,521	2,056,598
Depreciation and impairment	-	-	-	32,670	32,670	31,316
Carers Grants	-	1,438,614	-	-	1,438,614	609,891
Other staff related costs	186,669	-	-	-	186,669	139,083
Rent	-	-	48,595	-	48,595	66,619
Communication costs	-	-	-	36,857	36,857	32,179
Project costs	-	97,001	-	90,920	187,921	90,892
Office costs	-	-	-	95,013	95,013	82,523
Marketing & Communication	58,233	-	-	-	58,233	24,670
Partnership fees	120,769	-	-	-	120,769	25,505
Management fees	33,907	-	-	-	33,907	-
	<u>2,797,159</u>	<u>1,635,555</u>	<u>48,595</u>	<u>255,460</u>	<u>4,736,769</u>	<u>3,159,276</u>
Share of support costs (see note 9)	-	-	-	204,573	204,573	287,020
Share of governance costs (see note 9)	-	-	-	26,311	26,311	63,644
	<u>2,797,159</u>	<u>1,635,555</u>	<u>48,595</u>	<u>486,344</u>	<u>4,967,653</u>	<u>3,509,940</u>
<b>Analysis by fund</b>						
Unrestricted funds - general	2,138,081	10,662	48,595	414,274	2,611,612	2,467,330
Unrestricted funds - designated	155,657	3,452	-	50,674	209,783	153,518
Restricted funds	503,421	1,621,441	-	21,396	2,146,258	889,092
	<u>2,797,159</u>	<u>1,635,555</u>	<u>48,595</u>	<u>486,344</u>	<u>4,967,653</u>	<u>3,509,940</u>

\*Management fees are internal recharges against restricted funds.



# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2023

#### 8 Charitable activities

(Continued)

#### For the year ended 31 March 2022

	Direct activities	Grant funding of activities	Premises expenditure	Office running costs	Total 2022
	£	£	£	£	£
Staff costs	2,056,598	-	-	-	2,056,598
Depreciation and impairment	-	-	-	31,316	31,316
Carers Grants	-	609,891	-	-	609,891
Other staff related costs	139,083	-	-	-	139,083
Rent	-	-	66,619	-	66,619
Communication costs	-	-	-	32,179	32,179
Project costs	-	37,567	-	53,325	90,892
Office costs	-	-	-	82,523	82,523
Marketing & Communication	24,670	-	-	-	24,670
Partnership fees	25,505	-	-	-	25,505
	<u>2,245,856</u>	<u>647,458</u>	<u>66,619</u>	<u>199,343</u>	<u>3,159,276</u>
Share of support costs (see note 9)	-	-	-	287,020	287,020
Share of governance costs (see note 9)	-	-	-	63,644	63,644
	<u>2,245,856</u>	<u>647,458</u>	<u>66,619</u>	<u>550,007</u>	<u>3,509,940</u>
<b>Analysis by fund</b>					
Unrestricted funds - general	1,863,569	6,902	66,619	530,240	2,467,330
Unrestricted funds - designated	140,008	1,717	-	11,793	153,518
Restricted funds	242,279	638,839	-	7,974	889,092
	<u>2,245,856</u>	<u>647,458</u>	<u>66,619</u>	<u>550,007</u>	<u>3,509,940</u>

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 9 Support costs

	Support costs	Governance costs	2023	Support costs	Governance costs	2022
	£	£	£	£	£	£
Staff costs	200,420	-	200,420	284,269	-	284,269
Bank charges	4,153	-	4,153	2,751	-	2,751
Audit fees	-	8,513	8,513	-	7,621	7,621
Accountancy and legal fees	-	8,311	8,311	-	43,952	43,952
Governance costs heading 2	-	9,487	9,487	-	12,071	12,071
	<u>204,573</u>	<u>26,311</u>	<u>230,884</u>	<u>287,020</u>	<u>63,644</u>	<u>350,664</u>
Analysed between						
Charitable activities	<u>204,573</u>	<u>26,311</u>	<u>230,884</u>	<u>287,020</u>	<u>63,644</u>	<u>350,664</u>

### 10 Net movement in funds

	2023	2022
	£	£
Net movement in funds is stated after charging/(crediting)		
Fees payable to the company's auditor for the audit of the company's financial statements	8,513	7,621
Depreciation of owned tangible fixed assets	32,670	31,316
Amortisation of intangible assets	-	7,597
	<u></u>	<u></u>

### 11 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the charitable company during the year.

#### Trustees' expenses

Trustees were reimbursed expenses during the year £59 (2022: £367).

### 12 Employees

The average monthly number of employees during the year was:

	2023	2022
	Number	Number
Part time	72	58
Full time	47	44
	<u></u>	<u></u>
Total	<u>119</u>	<u>102</u>

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 12 Employees (Continued)

Employment costs	2023 £	2022 £
Wages and salaries	2,477,579	2,136,378
Social security costs	188,183	163,813
Other pension costs	74,804	76,001
	<u>2,740,566</u>	<u>2,376,192</u>

The key management personnel of the charity comprise the Chief Executive, the Director of Finance, Deputy CEO and the Carers Services Managers. The total employee benefits of key management personnel of the charity were £316,458 (2022: £245,886).

The number of employees whose annual remuneration was more than £60,000 is as follows:

	2023 Number	2022 Number
£60,001 - £70,000	<u>1</u>	<u>1</u>

### 13 Taxation

The charity is exempt from tax on income and gains falling within section 505 of the Taxes Act 1988 or section 252 of the Taxation of Chargeable Gains Act 1992 to the extent that these are applied to its charitable objects.

### 14 Intangible fixed assets

	Computer software £
<b>Cost</b>	
At 1 April 2022 and 31 March 2023	<u>46,581</u>
<b>Amortisation and impairment</b>	
At 1 April 2022 and 31 March 2023	<u>46,581</u>
<b>Carrying amount</b>	
At 31 March 2023	<u>-</u>
At 31 March 2022	<u>-</u>

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 15 Tangible fixed assets

	Computers and VOIP system	Office Equipment	CRM System	Total
	£	£	£	£
<b>Cost</b>				
At 1 April 2022	78,873	3,626	241,231	323,730
Disposals	(300)	-	-	(300)
At 31 March 2023	78,573	3,626	241,231	323,430
<b>Depreciation and impairment</b>				
At 1 April 2022	44,835	3,182	106,021	154,038
Depreciation charged in the year	16,056	444	16,170	32,670
At 31 March 2023	60,891	3,626	122,191	186,708
<b>Carrying amount</b>				
At 31 March 2023	17,682	-	119,040	136,722
At 31 March 2022	34,038	444	135,210	169,692

### 16 Debtors

	2023	2022
	£	£
<b>Amounts falling due within one year:</b>		
Trade debtors	25,024	439,311
Other debtors	-	300
Prepayments and accrued income	52,088	39,936
	77,112	479,547

### 17 Creditors: amounts falling due within one year

	2023	2022
	£	£
Other taxation and social security	187,808	215,544
Trade creditors	30,674	47,862
Other creditors	10,297	9,970
Accruals and deferred income	395,219	660,969
	623,998	934,345

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 18 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds					Movement in funds					
	Balance at 1 April 2021	Incoming resources	Resources expended	Transfers	Revaluations, gains and losses	Balance at 1 April 2022	Incoming resources	Resources expended	Transfers	Revaluations, gains and losses	Balance at 31 March 2023
	£	£	£	£	£	£	£	£	£	£	£
Additional core contract activity	1,877	7,000	(150)	-	-	8,727	2,500	(7,886)	(1,877)	-	1,464
Core contract variation	53,265	72,086	(83,545)	(7,910)	-	33,896	118,361	(117,220)	(2,440)	-	32,597
Covid-19 grants for infection control	-	19,680	(19,680)	-	-	-	-	-	-	-	-
Direct grants for carers	70,658	580,893	(615,172)	-	-	36,379	680,965	(663,651)	20,599	-	74,292
Grant funded carer activity	94,079	207,269	(95,863)	(14,523)	-	190,962	1,487,015	(1,301,339)	(34,959)	-	341,679
NHS funded activity	15,864	71,393	(41,055)	(5,076)	-	41,126	214	(14,096)	(2,153)	-	25,091
Hospital Capital Funding	17,600	-	-	-	-	17,600	-	(13,470)	-	-	4,130
SAHAH	-	36,301	(42,677)	-	-	(6,376)	42,100	(42,621)	6,897	-	-
Fundraising	26,646	-	-	-	-	26,646	-	-	(26,646)	-	-
Funding for Marketing & Comms	-	2,151	-	-	-	2,151	-	-	(2,151)	-	-
	<u>279,989</u>	<u>996,773</u>	<u>(898,142)</u>	<u>(27,509)</u>	<u>-</u>	<u>351,111</u>	<u>2,331,155</u>	<u>(2,160,283)</u>	<u>(42,730)</u>	<u>-</u>	<u>479,253</u>

## CARERS SUPPORT WEST SUSSEX

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

*FOR THE YEAR ENDED 31 MARCH 2023*

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#### 18 Restricted funds

(Continued)

During the year the Directors are grateful to the following Trusts and Foundations funders for supporting unpaid Carers in West Sussex:

**West Sussex County Council** for our Bilingual Memory Navigator project, Dementia Carer connect project and Enhanced Drug & Alcohol support project

**North West Seagulls, Billingshurst Lions, The Schuh Trust, The 29th May 1961 Charitable Trust, The Rotary Club, The National Lottery Community Fund, D'Oyly Carte Charitable Trust, Waitrose Community (John Lewis), The Longley Trust and The Three Oaks Trust** for our Young Carers Programme.

**The Saturday Hospital Fund and the Budding Foundation** for contributions towards equipment to support unpaid Carers.

**Carers Trust** for our Making Carers Count project.

**West Sussex Dementia Team** for our Check in & Chat Project and PAPA workshops.

**Dementia Services Development Trust** for our Dementia SA Communities project.

**Crawley Borough Council** for our Good Grief Café project, Dementia Pathway Event and Carers Cost of Living Project.

**Age UK West Sussex, Brighton & Hove** for our Support at home after hospital project.

**Wylandair Labradors and Orbis Investments** for donations towards Carer activities.

**Crawley Community Shop, Olby Holdings, TK Maxx, The Boltini Trust and Bassil Shippam & Alsford Trust** towards core costs providing much needed support for unpaid carers.

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 19 Designated funds

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

	Movement in funds					Movement in funds					
	Balance at 1 April 2021	Incoming resources	Resources expended	Transfers	Revaluations, gains and losses	Balance at 1 April 2022	Incoming resources	Resources expended	Transfers	Revaluations, gains and losses	Balance at 31 March 2023
	£	£	£	£	£	£	£	£	£	£	£
Website	-	-	-	-	-	-	-	(13,068)	40,000	-	26,932
Finance D'ment	-	-	-	-	-	-	-	(50,857)	60,000	-	9,143
Comms								(16,053)	39,000		22,947
New Learning and D'ment								(13,682)	25,000		11,318
Development Fund	225,878	-	(139,470)	-	-	86,408	-	(117,072)	86,267	-	55,603
Emergency Covid- 19 Fund	7,507	-	(1,830)	(5,471)	-	206	-	-	(206)	-	-
Fundraising & Development Activities	1,765	-	(30,112)	25,000	-	(3,347)	-	-	3,347	-	-
Premises Working Group	15,000	-	-	-	-	15,000	-	(18,459)	3,459	-	-
Strategic Development Fund	5,000	-	(6,648)	7,000	-	5,352	-	-	-	-	5,352
Volunteering								(4,072)	4,072		-
CRM Consultant	-	-	-	-	-	-	-	(4,240)	4,240		-
Dementia - Young onset weekends	-	-	-	1,000	-	1,000	-	(880)	(80)	-	40
My Future	-	-	(1,733)	3,674	-	1,941	-	-	(1,941)	-	-
	<u>255,150</u>	<u>-</u>	<u>(179,793)</u>	<u>31,203</u>	<u>-</u>	<u>106,560</u>	<u>-</u>	<u>(238,383)</u>	<u>263,158</u>	<u>-</u>	<u>131,335</u>

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

*FOR THE YEAR ENDED 31 MARCH 2023*

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### 19 Designated funds

(Continued)

**Website** - An investment in a new website and exploration of self-serve options, including auto population of our CRM and links with Sussex wide carer activity.

**Finance Development Fund** - An investment for the Finance Team support to enable us to resource our Finance Plan and create effective finance information to support the charity going forward.

**Communications** – Funds set aside for a one-year Locality Marketing/Communications Officer to support the work of our Locality Managers as they implement their new programmes of work close to where people live.

**New Learning and Development Fund** – funds towards a Training & HR Administrator role to support the recording and reporting of learning and development. Continuation of Management Development training focussing on management behaviours.

**Development Fund (Income Generation)** - represents monies set aside by the Board to sustain charity resources over the course of the three to five years. This is necessary to ensure that the core universal contract service offer can be delivered and that CSWS can provide other directly funded frontline charity support to designated areas of known highest priority need.

**Volunteering** – Funds towards an external standard which aims to improve the quality of the volunteering experience and to ensure that CSWS acknowledges the contribution of its volunteers. The quality standard is called ‘investing in Volunteers’.

**Governance, Fundraising and Development Activities** - these funds have been set aside to develop and enhance the organisation's approach to Funding and Development activities to ensure that the Charity continues to be able to meet its charitable objectives.

**Premises Working Group** - represents monies that the Charity has set aside to allow it to access professional advice and support in the development and implementation of its premises strategy.

**Strategic Development Fund** - has been set up to allow the Charity to meet the costs of advice and assistance that may be necessary in the development of its strategy for the next 5 years.



# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**FOR THE YEAR ENDED 31 MARCH 2023**

### 20 Analysis of net assets between funds

	Unrestricted funds	Designated funds	Restricted funds	Total	Unrestricted funds	Designated funds	Restricted funds	Total
	2023	2023	2023	2023	2022	2022	2022	2022
	£	£	£	£	£	£	£	£
Fund balances at 31 March 2023 are represented by:								
Tangible assets	136,722	-	-	136,722	169,692	-	-	169,692
Current assets/(liabilities)	801,925	131,335	479,253	1,412,513	893,400	106,560	351,111	1,351,071
	<u>938,647</u>	<u>131,335</u>	<u>479,253</u>	<u>1,549,235</u>	<u>1,063,092</u>	<u>106,560</u>	<u>351,111</u>	<u>1,520,763</u>

# CARERS SUPPORT WEST SUSSEX

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

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### 21 Related party transactions

There were no disclosable related party transactions during the year (2022 - none).

22 Cash generated from operations	2023 £	2022 £
Surplus for the year	28,472	14,305
Adjustments for:		
Investment income recognised in statement of financial activities	(11,838)	(6,686)
Depreciation and impairment of tangible fixed assets	32,670	31,316
Movements in working capital:		
Decrease/(increase) in debtors	402,435	(397,702)
(Decrease)/increase in creditors	(310,347)	693,890
<b>Cash generated from operations</b>	<b>141,392</b>	<b>335,123</b>
23 Analysis of changes in net funds		
The charitable company had no debt during the year.		