

**Report of the Trustees and
Financial Statements
for the Year Ended 31st March 2023
for
HALE HEALTH ACTION LOCAL ENGAGEMENT**

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HALE HEALTH ACTION LOCAL ENGAGEMENT

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**Report of the Trustees
for the Year Ended 31st March 2023**

The trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the year ended 31st March 2023. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

The promotion of the physical, social, economic, environmental and mental health and wellbeing of the general public by the provision of counselling, advice, education, training, recreation or other occupations to those who have need of such facilities by reason of their youth, age, infirmity or disability, financial hardship or social circumstances, with the overall object of improving their conditions of life and the social fabric of the community in which they live.

Significant activities

HALE is a Healthy Living Project, delivering community based health improvement activities in Shipley and surrounding areas since 2003. We work with people of all ages, concentrating our efforts in the areas of deprivation and health inequalities where there is greatest need, working around the key themes of Mental Health and Wellbeing, Alcohol Awareness, Sexual Health and Nutrition.

Public benefit

We have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing our aim and objectives and in planning our future activities. In particular, the trustees consider how planned activities will contribute to the aims and objectives they have set.

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ACHIEVEMENT AND PERFORMANCE

Charitable activities

This year we continued to experience significant growth and development in line with our annual action plan, to meet the ongoing and increasing needs of over 20,000 children, young people and adults living in our district.

The aftermath of the global pandemic and the cost-of-living crisis placed additional pressures on the most vulnerable in our communities and like many other charities, we have seen increasing demand on our much-needed projects and services.

Regardless of the challenging environment we faced, made up of, reducing public budgets, increasing running costs and a recruitment crisis, the HALE team, alongside key health, care, and voluntary sector partners, rose to the challenge.

Significant areas of focus throughout the year have included:

- Strengthening and developing our own internal capabilities including our Core Operations team and core functions to meet the demands of our growing organisation.
- Leading on the successful implementation of the Shipley Wellbeing Hub which is 1 of 6 network hubs across the district, working together to provide rapid and specialist services for those who have needs relating to domestic violence, substance misuse, caring responsibilities, debt/welfare, mental health and refugee, asylum seeker status.
- Extending and developing specialist Social Prescribing services which include MAST (Multi Agency Support Teams) based in our main hospitals, One Step Beyond (Social Prescribing for individuals living with a Serious Mental Illness and our Young Peoples Social Prescribing for young people with learning disabilities project.
- Ongoing development of The Shipley Health and Wellbeing Campus (Shipley Town Funds Project)
- Completing our Young People Social Prescribing Evaluation report, to evidence the impact of our pilot project.
- The design, development and launch of the Re-thinking Pain Service - A new community-based service for adults living with long-term pain in the Bradford and Craven area.
- Working to strengthen and develop our local Community Partnership.
- Establishing a key element of the new Reach Wellbeing Service in partnership, for individuals transitioning back into the community following a period of support in secondary care mental health services.

Our commitment to embrace and utilise technology to further aid our work, developed significantly throughout the year. We invested in:

- Enhanced remote working capability, to ensure our expanding workforce could undertake hybrid working, from home and in the community.
- Citation - An online system and round the clock support to manage our HR, Employment Law and Health & Safety Advice.
- A new and improved central phone system compatible for the future.

By far our biggest investment has been in the purchase and roll out of Upshot - A bespoke monitoring and evaluation system which will help us to manage our data, improve performance, track progress, and report against outcomes - all with the aim of evaluating our full impact as an organisation.

To ensure our growth remained firmly in line with our core mission **"To improve health where there is greatest need"** we revisited and reimagined our shared values and aims and confirmed our vision for the future. These continue to be the foundation stones for all work we undertake.

Our Vision is - Healthy, connected and happy communities throughout our district.

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We aim to:

- Improve aspiration and happiness in local communities, by enabling people to manage their own health and wellbeing.
- Improve peoples' knowledge of how to engage with their local community so they feel less isolated and lonely.
- Work with and inform local people, helping them understand how to manage their health needs and how to use health and care services.
- Support the reduction of known health inequalities across our communities.

Our values are:

CONNECTING - At HALE we believe in:

- Re-CONNECTING people and communities to their strengths, hopes and aspirations.
- CONNECTING people to each other and their communities.
- CONNECTING and working with partners to seek solutions which lead to Improved health and wellbeing across our communities.

DEDICATION - At HALE we are:

- DEDICATED to listening, understanding and learning from people and communities.
- DEDICATED to encouraging and empowering people and communities to take steps towards improving their health and well-being.
- DEDICATED to tackling health inequalities and injustice - Through our work we will positively challenge traditional ways that health and care provision is designed and delivered and bring the voice and needs of our communities to the forefront of decision making and service redesign.

RESPECT - At HALE we will:

- RESPECT people and communities as those who are best placed, to improve their health and wellbeing.
- RESPECT, value and embrace the diversity of our people and communities.
- RESPECT and value everyone with integrity, care and compassion.

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Charitable activities

A more detailed summary of our activities and services throughout the last year can be found below.

Community Connectors Service (Social Prescribing / Link Workers)

Our Community Connector Teams worked incredibly hard, post Covid to return to a full social prescribing service, supporting our clients out in the community with many more face to face visits, whilst adapting to new post covid combined ways of working.

Working closely with and alongside GP practices in 6 out of the 10 PCN's (primary Care Networks) in Bradford, alongside the Bradford and Craven wide Community Mental Health Teams and in the Bradford Royal infirmary we continued to support a significant number of local people, who often, have complex health and social needs.

We continued to connect individuals into local community assets, services and support around many different areas, including anxiety/ low mood/ low level mental health, social isolation, struggling to live independently, money/ debt/ benefit advice, education/training/ employment and much more.

Throughout the year, we supported **1,244** clients working in partnership with our colleagues at the Girlington Centre and Grange Interlink, via our CLICS (Central Located Integrated Care Service) team, as part of RIC (Reducing Inequalities in Communities). The service continued to go from strength to strength, integrating clinical and non-clinical services to support people's needs in a holistic way, involving them in the development of their own care plan, by focusing on what is important to them.

It has continued to enable GP practices to provide their patients with tailored, asset based, personalised care, which in turn has reduced the reliance on reactive health care.

The initial Community Connector contract linked to CLICS, commissioned in two parts with HALE and the VCS Alliance supporting the partner organisations, underwent some major changes in the summer of 2022, with the VCS Alliance, after some considerable thought, requesting to withdraw, from CLICS. Whilst a challenging time for all, we took on the full contract at the request of the Bradford and Craven, Health and Care Partnership, and as a result of this, HALE took on the direct partnership arrangement with the Girlington Centre, and began searching for a new partner, bringing on board Grange Interlink.

With a wealth of support and positive feedback from practices and clients alongside other stakeholders, we were thrilled to be shortlisted for the NALW 'Social Prescribing service of the Year award' for our CLICS service at HALE.

We supported a further **447** individuals via referrals from our 3 PCN (Primary Care Network) partners in addition to **584** individuals who were supported through a social prescribing, clinic-based appointment service.

With increasing numbers of referrals and high need following Covid, exciting conversations have taken place to enhance our support in two of the PCN areas, with plans afoot to provide further resources and support to even more patients in the coming year.

We promoted Social Prescribing Day March 2023. This saw a large-scale community event at Grange Interlink, with many local VCS services/ groups and statutory services coming together to showcase their offers to the community, along with raffles, food and more! a similar event took place at the Girlington Centre and a shared Bradford Social Prescribers event at Scorex House for all providers.

We continued to link in with our Young Persons Social Prescribing service, enabling a whole family approach, where required and a smooth transition for young people, with the added sharing of resources benefitting both RIC funded services.

A thorough and comprehensive evaluation continues, to ascertain whether, as one of the Reducing Inequality in Communities funded services, longer term "business as usual" funding should be allocated beyond March 2024.

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Practice feedback: "We have found the work of our CLICS social prescribing instrumental in providing great outcomes for our patients with positive feedback that can be both measured in terms of comments from patients and the considered improvement in health by their own GPs."

Client comment: 'A massive thank you to our CC at the CLICS programme for all her help in guiding me in the right direction with regards to Dad. Without her, I wouldn't have applied for Attendance Allowance or known where to go to get help with getting equipment for the bath and help with jobs like decorating and gardening. Not only has she been there to help with Dad's needs she also helped with mine by referring me to Carer's resource to get £150 so that I can do something nice for myself. Many thanks

MAST (Multi Agency Support Team)

HALE's Social Prescribing Service joined the multi award-winning MAST team in the Bradford Royal Infirmary (BRI) and in partnership with Keighley Healthy Living and Airedale Hospital. In the BRI our Community Connector provided social prescribing support to 59 individuals in the community as they discharged from hospital, with the overall aim of reducing demand on the hospital and helping to prevent re-admissions by supporting individuals to access support/services in the wider community.

Alongside referrals received via the MAST team, 100's more individuals received a bedside visit to establish wider support needs and direct them to most appropriate MAST service, alongside services from the Cellar Trust providing mental health support, Project 6, drugs and alcohol support and Carers Resource.

One Step Beyond

One Step Beyond (OSB), a year-long pilot project, saw us offer a tailor made, social prescribing service to individuals accessing support via the five community mental health teams (CMHTs) across Bradford, Aire, Wharfe and Craven.

The service supported 59 clients who were approaching discharge from CMHT, referred for up to 12 sessions of support, producing personalised care plans, focussing on their goals, and helping them to connect to local community assets, services and social opportunities to aid recovery and support their transition from secondary care services back into the community.

With many success stories for individuals with often very complex needs, the fantastic pre/post evaluation results have demonstrated the difference the support made. In addition to this, many longer-term benefits included building positive relationships with the Community Mental Health Teams, enhancing their knowledge around social prescribing, and accessing the wider offer, alongside highlighting the value it can have for individuals stepping down from CMHT to other available support in the community.

Wellbeing Network - Shipley Wellbeing Hub

The Shipley Wellbeing Hub launched in April, as part of the Bradford Wellbeing Network, which is made up of 6 Wellbeing Hubs located across Bradford District and Craven. The hubs work in partnership with local NHS, Bradford Council, and the Voluntary and Community Sector to support individuals experiencing issues with mental health, domestic abuse, financial difficulties, and addiction. The Wellbeing Hubs provide a rapid response to those needs, ensuring individuals are fast tracked into the services needed, on their doorstep.

During our first year the hub worked with 145 people, providing speedy pathways into our delivery provider services, including welfare benefits advice delivered by CAB, domestic abuse support provided by Staying Put, carer support delivered by Carer's Resource and drug and alcohol support provided by the Bridge Project. Alongside the delivery provider services we have been able to offer a non-judgemental ear to those accessing the service who needed additional emotional support and access to further services.

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Working closely with local community activity providers and with additional funded through our physical and mental health grants, we have provided a food support program, women's only relaxation, yoga, and mindfulness programs and promoted the use of green spaces and engagement to our wellbeing sessions focusing on using the senses to connect with nature, mindful photography, willow weaving, shelter building and foraging. Physical activity programs also provided exercise sessions and gentle nature walks for those living with restricted mobility.

The hub also established a weekly mental health peers support group, offering clients the opportunity to come along together in a safe space to chat and enjoy refreshments whilst listening to and supporting each other.

During the run up to Christmas, we worked with families who had presented in desperate need. We were able to source food and presents for the children and gift vouchers that could be used for further food supplies or for more gifts for the children and a little something for the parents too.

We contacted a parent who had received support from the hub before Christmas to find out how our support had impacted on Christmas for her and her family. She told us.

"I don't know what we would have done without all your help, my kids had an amazing Christmas, the food was amazing, and the presents donated were just perfect. Thank you so much".

The Hub is now entering its second year and we welcome the appointment of a new Deputy who has a wealth of knowledge and experience in supporting community members. We look forward to continuing to provide the much-needed light at the end of the tunnel for those who turn to us for support.

Rethinking Pain

October 2022 saw us launch this innovative and fast paced new community-based service across Bradford District and Craven. Working closely in partnership with Keighley Healthy Living (KHL) we designed, developed and began to deliver a brand-new pathway for people living with pain, based on the success of 2 early pilot projects delivered in 2020/2021.

Recruitment, induction, and training specifically in social prescribing and pain management, has been key for new team members, with a view to helping clients to learn more about how their body responds to pain and what holistic steps they can take to manage their pain on a day-to-day basis. Further training in the 10 Steps Pain Management Programme and Cognitive Behaviour Therapy also took place. The team also worked closely with clinical pain specialists, in the design and content for the pain management workshops to be delivered in early 2023.

Between October and December 2022 we saw an influx of referrals with the team holding an active case load of **753** clients and by March 2023 we had received referrals for almost **1,000** clients.

The team continues to be very busy supporting clients with telephone based one to one support, offering signposting, introducing clients to community-based activities and also providing information on how pain operates and steps that can be taken holistically to manage their pain.

March also saw the Rethinking Pain Team start to roll out the Rethinking Pain model to our voluntary community sector partners, sharing the vision for the service and also opportunities for joint partnership working.

Anne, a Re-thinking Pain client was full of praise for her Pain Social Prescriber and describes the huge positive impact the service has made. Anne has started to make major lifestyle changes in her life, which have made her feel so much healthier. These have involved tweaks with her diet and regularly attending a local exercise class, something that she never thought she would do, but these changes made a great deal of difference to her pain and feelings of control.

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REACH

In October 2022, a partnership bid focusing on supporting people who live with severe and enduring mental health needs was successful. REACH Project (previously The Wellbeing Service) led by the Cellar Trust and with key partners including HALE, will support clients who have a Serious Mental Illness diagnosis.

Our role will be to support clients in gaining confidence and creating community connectivity. The service will work with clients for a 6-month period providing one to one client focussed support.

Recruitment and induction of a Group Volunteer Co-ordinator, along with mobilisation and implementation plans to support clients in taking part in a range of community based social activities (peer support groups, friendship groups) has been the main areas of focus in the early months of this new and existing project.

Youth Work - Young People's Social Prescribing (YPSP), Local Sexual Health, Relationships and Sexual Education (RSE) in Schools and Youth Engagement.

Working post-pandemic and with more services opening back a restructure to the team took place, seeing the departure of 3 members of staff and the successful recruitment of 2 new members to take the Youth Service Team to a total of 5.

The team developed professionally, undertaking further training to increase skills and knowledge, to ensure we have a greater impact on the lives of young people who we support. Key training included, Trauma Informed Practice, RSE modules, Safeguarding Level 2, ACES (Adverse Childhood Experiences), Train the Trainer in Coercive Control and Domestic abuse, Gambling Lives and 1 member completed the VCSE LEAD, Leadership Programme

We saw record breaking numbers of referrals received, numbers of interventions delivered, group sessions and young people and professionals supported. In total across all our services, the youth work team have worked with **6,772** individuals.

Our RSE work, delivered in partnership with Step 2 and James Project grew throughout the year, working in 32 different education settings, engaging 12 of the 13 priority schools and supporting 4854 students and staff.

We expanded our offer to provide school curriculum reviews alongside our traditional RSE programme, staff CPD and peer review sessions.

As a partnership, we also received new funding from West Yorkshire Combined Authorities to deliver VAWG (Violence Against Women & Girls) training to **98** frontline workers and to **43** young males in male only settings and a further **23** young people in a mixed group setting.

Our LOCALA sexual health outreach and engagement work had a successful year, establishing new partnerships with 2 pharmacies, 4 children's homes and 10 new schools. We undertook monthly outreach sessions across the city, promoting the service offer. The team continued their weekly drop-in sessions in schools and attended Freshet's Fairs at Bradford College, Askham Bryan and Shipley College as well as Bradford University.

We partnered with Bradford City Trust to deliver sexual health sessions to their NCS (National Citizen Service) participants and worked with them on their community outreach summer programme in Windhill, providing sexual health advice to young people aged 15-17.

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Statistics:

- 77 access points created on the C-Card database
- Delivered 19 training sessions this year reaching 94 professionals
- 4 refresher sessions
- In total 227 new professionals on the C-Card database
- 719 young people signed up to C-Card
- Promoted Locala and C-Card in 13 schools and reached 1,496 students
- Delivered a session at Bevan to 20 young men who were new to the country

Sadly, our partnership to deliver within this service came to an end in March 2023, after 8 successful years. However, HALE retain a positive working relationship with LOCALA and continue to refer young people into their services and promote C-Card access through their RSE work.

YPSP continued to provide one to one, group activities and signposting for young people aged 9 to 19 years old. Through great partnerships with stakeholders, we received **176** new referrals in addition to working with existing clients.

The project also completed an Evaluation of the first 2 years of delivery, which highlighted the excellent work undertaken during this period, and the impact the work has had on the young people we work with. These findings were also presented at the West Yorkshire Health and Care Partnership Health Inequalities event.

The team also marked and celebrated National Social Prescribing Day alongside our Social Prescribing colleagues internally and externally through hosting and attending a variety of events across the district throughout the week.

YPSP have engaged with various partners and ran sessions to support the wellbeing of young people. HALE YPSP, partnered with the ALL Stars group to run weekly sessions for young people aged 9-13 and 14-18 to discuss mental health and develop their emotional wellbeing skills. These sessions were a huge hit with young people saying **"they felt more confident in handling their emotions and had improved their understanding about why they might be feeling certain ways. We also delivered a group session focusing on Self Care and coping mechanisms"**

YPSP organised a range of social activities throughout the year, including girls' and boys' groups, arts, and crafts sessions to help combat isolation amongst young people. The team produced a small school holiday programmes throughout the year, that consisted of a pancake party, sports sessions, attending Bradford City Council summer events in the park, cooking sessions with Inn Churches, climbing at the Climbing Hub, a trip to Bradford City FC, a trip to Bramhall Lane to watch the Womens Euro's football tournament, Lazer Zone, Ice Skating, a Bushcraft Skills session, trip to the theatre to see Twelfth Night and partnering with Affinity to work with a play therapist who ran a 4-week clay art therapy session in the city centre.

Finally we partnered with Pinnacle Performance gym to bring a group of young people into the gym environment to learn about the importance of a healthy lifestyle through food and exercise and to engage in a range of fitness-based activities and sport.

Quote from Manager at Pinnacle Performance **"It was a pleasure to have young people attend the session today. I was blown away by the number of questions they had about healthy lifestyles, food genres and different types of exercise. I am glad that they enjoyed themselves and took something from the session. It was fun and the young people were amazing!"**

Baildon Youth Council had a busy year planning and delivering various events within the district, fundraising and getting involved with HALE's befriending service, supporting them with intergenerational events and setting up their own open access youth group at Wesley's Café Baildon for young people aged 8-13.

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The Youth Team helped support the youth council with job applications, employability skills workshops and CV writing.

Through the Youth Council, the young people worked to obtain ASDAN accredited awards in volunteering and group work.

Throughout the year the youth council delivered **20** open access youth groups, supported **6** HALE events and delivered **3** of their own events, including hosting a music event for other young people, hosting a stall at Bradford PRIDE and supporting Baildon at Christmas events.

Learning Disability Focussed

Due to Bradford District Care NHS Foundation Trust recognising that there was a low uptake in referrals to social prescribing (for adults and young people) we received funding to promote the benefits of social prescribing directly to young people/young adults with a Learning Disability/Difficulty and /or Autism and also to their families.

Via our YPSP work we offered opportunities for young people with an LD and/or Autism to attend activities and trips as highlighted above.

Working alongside the Engagement Team we promoted Social Prescribing and other support available to families and young people at over **25** events such as: Coffee Mornings & Parents Evenings at local schools, drop in sessions in schools/colleges and a variety of community events.

Together with the Engagement Team, and PCN5, we organised a Christmas Extravaganza event in the city centre which combined stalls from organisations across the district, a silent disco, face painting and a visit from Santa.

Feedback from Bradford District Care NHS Foundation Trust shows that referrals to Social Prescribing for people of all ages with a Learning Disability/Difficulty and /or Autism have increased across the District.

Engagement - Citizens Engagement, Affinity Engagement and Warm Homes

In December 2021, we received the news that HALE as part of the HERE4BDCC Consortium, had won the tender to deliver 5 of the 6 lots of the new Voluntary Sector Support Improvement Programme to start in April 2022.

HALE now leads the Citizen's Engagement lot working closely with key partners at CNet, Keighley Healthy Living and Bradford Talking Media to deliver this programme of work (which replaces the Engaging People Project).

The Engagement team have successfully engaged with **5,530** individuals, collected 870 Experience of Care comments visited 205 community groups and health-based activities in the district and supported 35 events promoting self-care in line with the NHS campaigns.

Through our outreach work with local communities we continued to build positive relationships with the general public, and have had direct conversations about the 10 year National Strategy for Mental Health Provision, awareness raising for Diabetes and Respiratory Care and their local services and hosted Listen In Events across the district to hear what matters most regarding peoples own health and wellbeing. Through this important outreach work, we gathered and reported back to our local Health and Care Partnership quality insights to inform future decision making about health and care services.

Our Affinity Engagement team continued to provide enhanced support to enable Affinity Care to listen to their patients, increase effective patient engagement and enable their patients to play a key role in the future design and redevelopment of their services. Our team work closely with all G.P practices who form part of Affinity Care and other key stakeholder including their Patient Council members.

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Key areas of focus have included awareness raising and promotion of Diabetes and Respiratory Care, Covid and Flu Vaccinations and transforming the practices into Dementia Friendly spaces.

The team were also involved with the Enhanced Access to GP practices' work, developing patient surveys on Digital platforms within the practices, and supporting Affinity Care in increasing the uptake of annual reviews for patients with Learning Disabilities and those diagnosed as pre-diabetic.

Warm Homes Healthy People

HALE were invited once again to be a partner with Groundwork, Age UK and Inn Churches, bidding for and winning the Warm Homes Healthy People contract.

The HALE outreach team supported 636 individuals, connected with 49 different community groups and with additional funding distributed over 100 warm packs including hot water bottles, fleece blankets and cup a soup in the 12-month period.

We were also able to offer coats, shoes, duvets and provided access to energy vouchers, benefit advice, boiler repairs to the most vulnerable.

A warm homes client said "I was amazed that you were able to help, I told my daughter about the boiler and she suggested I ring HALE, in all honesty I wasn't expecting much but I didn't know what else to do so I thought I'd give it a try and from that one phone call everything was sorted so swiftly, beyond my expectations, thank you so much"

Reducing Isolation for older people

After a turbulent 2 years, this year saw our social and wellbeing groups getting back to a new normality, in terms of face-to-face activity and people finally being able to have regular social contact with others.

Whilst some members were initially hesitant and sometimes wary of contact, by the mid-point in the year, the usual celebrations and a wide range of social activities were being enjoyed once again. These activities included a coach trip to St Stephen H Smith by Guys & Dolls, Halloween, and Christmas extravaganzas events, Christmas Lunches, sing along sessions and performances.

Guest speakers were also invited to talk to members from an array of backgrounds including police officers, drummers, tram way staff and ukelele players!

Members with dementia and their carers have accessed our groups, finding comfort in our Baildon Buddies singing sessions, reminiscing with music from the 50s and 60s and taking part in various crafty activities. The groups attended arts performances in Bradford and an Intergenerational Christmas Event in Shipley.

We saw several new people become members, joining forces with long standing attendees and sadly on a reflective note we said goodbye to several members who are no longer with us.

Several members of the groups also came forward and are now active volunteers, creating a warm and welcoming atmosphere for all those who attend.

All of our groups have given some of the most vulnerable members of our community the opportunity to come together, get out of the house, and enjoy laughter, companionship, entertainment, and fun!

This year we continued to promote the befriending scheme and our volunteering opportunities, whilst supporting isolated people to get back to their pre Covid routines, as well as to try new activities and groups.

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We've promoted local groups and community venues through our two newsletters, joined with the Youth teams to organise intergenerational events and encouraged and supported other befriending schemes through the Bradford District Befriending Network. We've also continued organising Fit and Well sessions with the Bradford NHS Community Physiotherapist team.

Throughout the year we:

- Processed 89 referrals
- Matched 45 older isolated people with volunteers
- Matched 17 older isolated people with the specialist befriender.
- Matched 37 volunteers with older isolated people.
- Produced 2 newsletters
- Supported 5 new social groups
- Supported 31 people to join a new group/activity
- Carried out 12 Christmas doorstep drop offs
- Organised 3 intergenerational events

We have also overseen the Bradford District Befriending Website and organised quarterly meetings

Warm Spaces and Keeping Fit and Well

As winter approached in October 2022 and the cost-of-living crisis continued to impact the most vulnerable individuals, we became aware of and joined the Warm Spaces initiative. Along with other local groups and organisations across the district, we provided a safe, warm and friendly space, offering hot soups for people to enjoy during the session or to take home.

The sessions encouraged people to connect with others, socialise and try out new things.

With a captive audience, we joined forces with the NHS Community Physiotherapist team and delivered interactive information sessions, focussing on keeping active and healthy to maintain safe independent living in the home environment.

In total we supported **168** individuals throughout these sessions.

"I have found it very nice to have a bowl of soup and company." Warm Spaces attendee

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Our People

Our team of employees grew by **25%** throughout the year and we remain privileged to have an experienced/skilled workforce who are diverse, representative of and recruited from the communities we serve. **47%** of the team are from ethnically diverse backgrounds other than White British and collectively the team can speak **8** additional community languages.

To accommodate for our growing workforce we completed a refurbishment of our main HQ, enabling us to make the very best use of the space we had for a more conducive working environment.

We retained a healthy volunteer team of **80+** individuals who continued to give their time to support individuals who accessed our Befriending and Social/Wellbeing Services. These services could not run without the commitment of our dedicated volunteers who gave their time so generously to visit people at home, take people out into the community and host social events, activities and gatherings bringing people together. During a time when volunteer levels have declined across the country, we realise how lucky we are to retain such wonderful and dedicated individuals.

Those who join our organisation as an employee or as a volunteer, come with their own lived experiences to draw upon, along with their developed skills and knowledge in a range of areas. By sharing experiences, and holding a deep understanding of different needs, experiences, abilities, cultures, and backgrounds, our team remain best placed to engage and support others.

Throughout the year we have continued to facilitate a range of activities including, staff wellbeing events, team training sessions, what's app discussions groups and an annual full team away day. All of these have enabled us to maintain an inclusive and collaborative culture where we engage and listen to our team, encourage creative thinking, shared learning, and the development of creating ideas and finding solutions together.

We continued to invest and support all employees with their personal development plans, progression opportunities and in maintaining positive wellbeing, demonstrating a commitment to "growing and looking after our own". As a result we held a **90%** staff retention rate, affirming that we remain an attractive employer. The growth of our organisation and team has led to the creation of 7 new Team Leader roles, with **71%** being filled by existing employees which in turn helps retain our culture and values.

We embrace the opportunity to reward and recognise excellence at work and as a charity with limited resources we have found creative ways to do this. We award the HALE star on a monthly basis, following votes from the team and staff wellbeing sessions provide a range of fun, relaxing and inclusive activities and one off rewards such as "duvet days" as a way to acknowledge the efforts of our team.

This year HALE were also involved in the co-design and development of the LEAD (Leadership, Empowerment, Ambition, Development) Programme, aimed at future leaders in the Bradford VCSE sector. 4 HALE employees completed the programme with 2 more enrolled for the coming year. The programme enhances knowledge and skills in Level 5 Leadership, Emotional Intelligence and facilitates mentoring and coaching relationships.

"Thank you first of all for employing me and providing me with this opportunity to grow. I feel like I have flourished in myself professionally and realised my skill set and potential; I have HALE to thank for this. Throughout my employment I have been really nurtured and supported. I have learnt a great deal."

Our team, without question are the most important collective asset when it comes to delivering the vast array of activities, services and support highlighted above. Without their dedication and commitment, we would not fulfil our mission. Therefore, once again, on behalf of the HALE CEO and Board of Trustees we wish to extend our huge thanks to the staff team, volunteers, sector colleagues, partners, commissioners, funders and donors for their unwavering and continued support throughout the last year.

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FINANCIAL REVIEW

Financial position

The Statement of Financial Activities shows total incoming resources of £1,402,077 (2022: £939,524) and total resources expended of £1,242,563 (2022: £869,960), being a net surplus on movement of funds of £159,514 (2022: £69,564).

The total reserves at the year end are £516,717 (2022: £357,203). Unrestricted reserves at the year end are £465,248 (2022: £277,376) and restricted funds are £51,469 (2022: £79,827).

Reserves policy

In conjunction with our Financial Procedures Policy this reserves policy forms part of our commitment to ensure the management and allocation of funds is carried out responsibly to enable Hale to continue to provide its core services and to secure the viability of the organisation beyond the immediate future.

The need to provide for medium to long term will ensure that we can absorb setbacks and take advantage of change and opportunity.

It is the view that we should have sufficient funds to enable Hale to exist for a period of time (Minimum of three months running costs, including any large scale Project or Commission), to enable the development of alternative funding streams.

Based on budgeted expenditure of £1,473,138 this would equate to approximately £368,285 to £736,569.

At the year end the charity's total unrestricted reserves were £465,248, excluding fixed assets of £11,993, leaves 'free' reserves of £453,255.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

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

The charity is a company limited by guarantee and was formed on 3 December 2007. It is governed by a Memorandum and Articles of Association.

The liability of the members in the event of the company being wound up is limited to a sum not exceeding £1.

Recruitment and appointment of new trustees

The trustees of the charity are also the directors for the purposes of company law and are appointed by the members at the AGM.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Company number

06443243 (England and Wales)

Registered Charity number

1123524

Registered office

1 Westgate
ShIPLEY
West Yorkshire
BD18 3QX

**Report of the Trustees
for the Year Ended 31st March 2023**

Trustees

Georgina Helen Haslam
Samantha Jane Brooks
Paul Dean
Ralph Spencer Greenwall
Robert Francis Prior

The following trustees hold the office of:

Chair	- Georgina Helen Haslam
Vice Chair	- Paul Dean

Key Management

Chief Officer	- Sonija Peers
Finance and Operations Manager	- John Evans
Social Prescribing Service Manager	- Samantha Monk

Auditors

BK Plus Audit Ltd
Statutory Auditor
52 St Johns Lane
Halifax
West Yorkshire
HX1 2BW

STATEMENT OF TRUSTEES' RESPONSIBILITIES

The trustees (who are also the directors of Hale Health Action Local Engagement for the purposes of company law) are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing those financial statements, the trustees are required to

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

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

In so far as the trustees are aware:

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

Report of the Trustees
for the Year Ended 31st March 2023

AUDITORS

The auditors, BK Plus Audit Ltd, will be proposed for re-appointment at the forthcoming Annual General Meeting.

Approved by order of the board of trustees on 20/12/2023 and signed on its behalf by:

Georgina Haslam

.....
Georgina Helen Haslam - Trustee

Opinion

We have audited the financial statements of Hale Health Action Local Engagement (the 'charitable company') for the year ended 31st March 2023 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

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

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditors' responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and the provisions available for small entities, in the circumstances set out in note 18 to the financial statements, 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 matter

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

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

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

The prior year accounts of the charitable company are unaudited.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the Report of the Trustees for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Report of the Trustees has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the Report of the Trustees.

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to take advantage of the small companies exemption from the requirement to prepare a Strategic Report or in preparing the Report of the Trustees.

Responsibilities of trustees

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

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

Our responsibilities for the audit of the financial statements

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

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

Our approach to identifying and assessing the risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, was as follows:

- The engagement partner ensured that the engagement team collectively had the appropriate competence, capabilities and skills to identify or recognise non-compliance with applicable laws and regulations;
- We identified the laws and regulations applicable to the company through discussions with directors and other management, and from our commercial knowledge and experience of the industry sector;
- We focused on specific laws and regulations which we considered may have a direct material effect on the financial statements or the operations of the company, including the Companies Act 2006, taxation legislation and data protection, anti-bribery, employment, environmental and health and safety legislation;
- We assessed the extent of compliance with the laws and regulations identified above through making enquiries of management and inspecting legal correspondence; and
- Ensured laws and regulations were communicated within the audit team regularly and the team remained alert to instances of non-compliance throughout the audit.

We assessed the susceptibility of the company's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by:

- Making enquiries of management as to where they considered there was a susceptibility to fraud, their knowledge of actual, suspected and alleged fraud;
- Considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations; and
- Understanding the design of the company's remuneration policies.

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

- Performed analytical procedures to identify any unusual or unexpected relationships;
- Tested journal entries to identify unusual transactions;
- Assessed whether judgements and assumptions made in determining the accounting estimates set out in note 2 were indicative of potential bias; and
- Investigated the rationale behind significant or unusual transactions.

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

- Agreeing financial statement disclosures to underlying supporting documentation;
- Reading the minutes of meetings of those charged with governance;
- Enquiring of management as to actual and potential litigation and claims; and
- Reviewing correspondence with HMRC, relevant regulators and the company's legal advisors.

**Report of the Independent Auditors to the Members of
Hale Health Action Local Engagement (Registered number: 06443243)**

There are inherent limitations in our audit procedures described above. The more removed that laws and regulations are from the financial transactions, the less likely it is that we would become aware of non-compliance. Auditing standards also limit the audit procedures required to identify non-compliance with laws and regulations to enquiry of the directors and other management and the inspection of regulatory and legal correspondence, if any.

Material misstatements that arise due to fraud can be harder to detect than those that arise from error as they may involve deliberate concealment or collusion.

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

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditors' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Victoria Atkinson BA FCA (Senior Statutory Auditor)
for and on behalf of BK Plus Audit Ltd
Statutory Auditor
52 St Johns Lane
Halifax
West Yorkshire
HX1 2BW



Date: 20 December 2023

HALE HEALTH ACTION LOCAL ENGAGEMENT

Statement of Financial Activities (Incorporating an Income and Expenditure Account) for the Year Ended 31st March 2023

		Unrestricted funds £	Restricted funds £	31/3/23 Total funds £	31/3/22 Total funds £
	Notes				
INCOME AND ENDOWMENTS FROM					
Donations and legacies	2	121,310	175,795	297,105	252,104
Charitable activities	4				
Affinity Care		83,313	-	83,313	99,651
Bradford North Western PCN		40,933	-	40,933	37,503
Bradford Trident		-	-	-	1,787
Cellar Trust		17,984	-	17,984	898
Community Action Bradford and District		171,136	-	171,136	11,900
Community Partnerships North		40,063	-	40,063	36,703
Equality Together Bradford		-	-	-	2,635
Hollyns Health and Wellbeing		-	-	-	39,481
Keighley Healthy Living Network		44,325	-	44,325	-
Locala		58,000	-	58,000	58,000
NHS Bradford District and Craven CCG		497,161	-	497,161	355,295
NHS Foundation Trust Charitable Funds		40,000	-	40,000	-
Rethinking Pain ARR's		73,602	-	73,602	-
Step 2		36,448	-	36,448	39,663
Trust Primary Care		-	-	-	1,250
Investment income	3	2,007	-	2,007	1,154
Other income		-	-	-	1,500
Total		1,226,282	175,795	1,402,077	939,524
EXPENDITURE ON					
Charitable activities	5				
Charitable activities		-	-	-	-
Staffing costs		775,457	119,151	894,608	702,147
Operational and central costs		55,033	5,641	60,674	67,622
Project and delivery costs		188,288	74,962	263,250	87,927
Advertising and publicity		680	-	680	299
Depreciation		11,986	-	11,986	9,076
Governance		11,365	-	11,365	2,889
Total		1,042,809	199,754	1,242,563	869,960
NET INCOME/(EXPENDITURE)		183,473	(23,959)	159,514	69,564
Transfers between funds	16	4,399	(4,399)	-	-
Net movement in funds		187,872	(28,358)	159,514	69,564
RECONCILIATION OF FUNDS					
Total funds brought forward		277,376	79,827	357,203	287,639

The notes form part of these financial statements

HALE HEALTH ACTION LOCAL ENGAGEMENT

Statement of Financial Activities (Incorporating an Income and Expenditure Account) for the Year Ended 31st March 2023

	Notes	Unrestricted funds £	Restricted funds £	31/3/23 Total funds £	31/3/22 Total funds £
TOTAL FUNDS CARRIED FORWARD		<u>465,248</u>	<u>51,469</u>	<u>516,717</u>	<u>357,203</u>

The notes form part of these financial statements

Balance Sheet
31st March 2023

	Notes	31/3/23 £	31/3/22 £
FIXED ASSETS			
Tangible assets	11	11,993	15,245
CURRENT ASSETS			
Debtors	12	38,785	14,852
Cash at bank and in hand		486,863	368,451
		<u>525,648</u>	<u>383,303</u>
CREDITORS			
Amounts falling due within one year	13	(20,924)	(41,345)
		<u>504,724</u>	<u>341,958</u>
NET CURRENT ASSETS			
		<u>516,717</u>	<u>357,203</u>
TOTAL ASSETS LESS CURRENT LIABILITIES			
		<u>516,717</u>	<u>357,203</u>
NET ASSETS			
		<u>516,717</u>	<u>357,203</u>
FUNDS	16		
Unrestricted funds		465,248	277,376
Restricted funds		51,469	79,827
		<u>516,717</u>	<u>357,203</u>
TOTAL FUNDS			
		<u>516,717</u>	<u>357,203</u>

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

The financial statements were approved by the Board of Trustees and authorised for issue on 20/12/2023..... and were signed on its behalf by:

Georgina Haslam

Georgina Helen Haslam - Trustee

The notes form part of these financial statements

HALE HEALTH ACTION LOCAL ENGAGEMENT

Cash Flow Statement for the Year Ended 31st March 2023

	Notes	31/3/23 £	31/3/22 £
Cash flows from operating activities			
Cash generated from operations	1	125,139	94,752
Net cash provided by operating activities		125,139	94,752
Cash flows from investing activities			
Purchase of tangible fixed assets		(8,734)	(18,512)
Interest received		2,007	1,154
Net cash used in investing activities		(6,727)	(17,358)
Change in cash and cash equivalents in the reporting period		118,412	77,394
Cash and cash equivalents at the beginning of the reporting period		368,451	291,057
Cash and cash equivalents at the end of the reporting period		486,863	368,451

The notes form part of these financial statements

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Cash Flow Statement for the Year Ended 31st March 2023

1. RECONCILIATION OF NET INCOME TO NET CASH FLOW FROM OPERATING ACTIVITIES

	31/3/23 £	31/3/22 £
Net income for the reporting period (as per the Statement of Financial Activities)	159,514	69,564
Adjustments for:		
Depreciation charges	11,986	9,076
Interest received	(2,007)	(1,154)
(Increase)/decrease in debtors	(23,933)	9,738
(Decrease)/increase in creditors	(20,421)	7,528
Net cash provided by operations	<u>125,139</u>	<u>94,752</u>

2. ANALYSIS OF CHANGES IN NET FUNDS

	At 1/4/22 £	Cash flow £	At 31/3/23 £
Net cash			
Cash at bank and in hand	368,451	118,412	486,863
	<u>368,451</u>	<u>118,412</u>	<u>486,863</u>
Total	<u>368,451</u>	<u>118,412</u>	<u>486,863</u>

The notes form part of these financial statements

**Notes to the Financial Statements
for the Year Ended 31st March 2023**

1. ACCOUNTING POLICIES**Basis of preparing the financial statements**

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

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Expenditure

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

Tangible fixed assets

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

Fixtures and fittings	- Straight line over 3 years
Motor vehicles	- Straight line over 4 years

Tangible fixed assets costing more than £500 are capitalised.

Gifted assets are shown at the value to the charity on receipt.

Taxation

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

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

2. DONATIONS AND LEGACIES

	31/3/23	31/3/22
	£	£
Donations	8,781	10,348
Users contributions to activities	2,210	1,300
Grants	286,114	240,456
	<u>297,105</u>	<u>252,104</u>

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

	31/3/23	31/3/22
	£	£
Baildon Parish Council	10,000	23,944
Bradford VCS Alliance	108,755	4,504
City of Bradford Metropolitan District Council	1,000	26,954
Community Partnership North	13,090	14,333
Department of Work and Pensions	2,089	20,079
Groundwork	28,003	9,752
National Lottery Community Fund	53,632	52,840
NHS Bradford District CCG	-	87,500
NHS Property Services	-	250
Project 6 - MAST	69,545	-
Yorkshire Sport	-	300
	<u>286,114</u>	<u>240,456</u>

3. INVESTMENT INCOME

	31/3/23	31/3/22
	£	£
Deposit account interest	<u>2,007</u>	<u>1,154</u>

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

4. INCOME FROM CHARITABLE ACTIVITIES

		31/3/23	31/3/22
	Activity	£	£
Contracts and service level agreements	Affinity Care	83,313	99,651
Contracts and service level agreements	Bradford North Western PCN	40,933	37,503
Contracts and service level agreements	Bradford Trident	-	1,787
Contracts and service level agreements	Cellar Trust	17,984	898
Contracts and service level agreements	Community Action Bradford and District	171,136	11,900
Contracts and service level agreements	Community Partnerships North	40,063	36,703
Contracts and service level agreements	Equality Together Bradford	-	2,635
Contracts and service level agreements	Hollyns Health and Wellbeing	-	39,481
Contracts and service level agreements	Keighley Healthy Living Network	44,325	-
Contracts and service level agreements	Locala	58,000	58,000
Contracts and service level agreements	NHS Bradford District and Craven CCG	497,161	355,295
Contracts and service level agreements	NHS Foundation Trust Charitable Funds	40,000	-
Contracts and service level agreements	Rethinking Pain ARR's	73,602	-
Contracts and service level agreements	Step 2	36,448	39,663
Contracts and service level agreements	Trust Primary Care	-	1,250
		<u>1,102,965</u>	<u>684,766</u>

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

5. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs (see note 6) £	Totals £
Staffing costs	894,608	-	894,608
Operational and central costs	60,674	-	60,674
Project and delivery costs	263,250	-	263,250
Advertising and publicity	680	-	680
Depreciation	11,986	-	11,986
Governance	-	11,365	11,365
	<u>1,231,198</u>	<u>11,365</u>	<u>1,242,563</u>

6. SUPPORT COSTS

	Governance costs £
Governance	<u>11,365</u>

7. NET INCOME/(EXPENDITURE)

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

	31/3/23 £	31/3/22 £
Auditors' remuneration	7,800	-
Depreciation - owned assets	<u>11,986</u>	<u>9,076</u>

8. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31st March 2023 nor for the year ended 31st March 2022.

During the year the charity has incurred expenditure on obtaining trustees indemnity insurance, the costs in the year was £468.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31st March 2023 nor for the year ended 31st March 2022.

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

9. STAFF COSTS

	31/3/23	31/3/22
	£	£
Wages and salaries	803,770	633,971
Social security costs	54,410	40,646
Other pension costs	36,428	27,531
	<u>894,608</u>	<u>702,148</u>

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

	31/3/23	31/3/22
	44	32
Average total (rounded)	<u>44</u>	<u>32</u>

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

The average number employees during the year was 44.5 (2022 : 32.2), being an average of 30.59 (2022 : 21.3) full time equivalent.

Key management personnel

The key management personnel of the charity is the Chief Officer. The total employee benefits received by the Chief Officer were £124,444 (2022: £102,299).

10. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted funds £	Restricted funds £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	10,893	241,211	252,104
Charitable activities			
Affinity Care	99,651	-	99,651
Bradford North Western PCN	37,503	-	37,503
Bradford Trident	1,787	-	1,787
Cellar Trust	898	-	898
Community Action Bradford and District	11,900	-	11,900
Community Partnerships North	36,703	-	36,703
Equality Together Bradford	2,635	-	2,635
Hollyns Health and Wellbeing	39,481	-	39,481
Locala	58,000	-	58,000
NHS Bradford District and Craven CCG	355,295	-	355,295
Step 2	39,663	-	39,663
Trust Primary Care	1,250	-	1,250
Investment income	1,154	-	1,154
Other income	1,500	-	1,500
Total	<u>698,313</u>	<u>241,211</u>	<u>939,524</u>

EXPENDITURE ON

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

10. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES - continued

	Unrestricted funds £	Restricted funds £	Total funds £
Charitable activities			
Charitable activities	-	-	-
Staffing costs	570,500	131,647	702,147
Operational and central costs	44,697	22,925	67,622
Project and delivery costs	31,671	56,256	87,927
Advertising and publicity	186	113	299
Depreciation	9,076	-	9,076
Governance	2,788	101	2,889
Total	658,918	211,042	869,960
NET INCOME	39,395	30,169	69,564
Transfers between funds	4,000	(4,000)	-
Net movement in funds	43,395	26,169	69,564
RECONCILIATION OF FUNDS			
Total funds brought forward	233,981	53,658	287,639
TOTAL FUNDS CARRIED FORWARD	277,376	79,827	357,203

11. TANGIBLE FIXED ASSETS

	Fixtures and fittings £	Motor vehicles £	Totals £
COST			
At 1st April 2022	36,068	16,500	52,568
Additions	8,734	-	8,734
Disposals	-	(13,500)	(13,500)
At 31st March 2023	44,802	3,000	47,802
DEPRECIATION			
At 1st April 2022	20,823	16,500	37,323
Charge for year	11,986	-	11,986
Eliminated on disposal	-	(13,500)	(13,500)
At 31st March 2023	32,809	3,000	35,809
NET BOOK VALUE			
At 31st March 2023	11,993	-	11,993
At 31st March 2022	15,245	-	15,245

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

12. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31/3/23	31/3/22
	£	£
Trade debtors	14,888	5,038
Prepayments	7,637	5,877
Accrued income	16,260	3,937
	<u>38,785</u>	<u>14,852</u>

13. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31/3/23	31/3/22
	£	£
Other creditors	-	32,315
Accruals	20,924	2,160
Deferred income	-	6,870
	<u>20,924</u>	<u>41,345</u>

14. LEASING AGREEMENTS

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

	31/3/23	31/3/22
	£	£
Within one year	14,218	14,218
Between one and five years	28,481	2,946
	<u>42,699</u>	<u>17,164</u>

15. ANALYSIS OF NET ASSETS BETWEEN FUNDS

	Unrestricted funds	Restricted funds	31/3/23 Total funds	31/3/22 Total funds
	£	£	£	£
Fixed assets	11,993	-	11,993	15,245
Current assets	474,179	51,469	525,648	383,303
Current liabilities	(20,924)	-	(20,924)	(41,345)
	<u>465,248</u>	<u>51,469</u>	<u>516,717</u>	<u>357,203</u>

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued
for the Year Ended 31st March 2023

16. MOVEMENT IN FUNDS

	At 1/4/22 £	Net movement in funds £	Transfers between funds £	At 31/3/23 £
Unrestricted funds				
General fund	118,714	183,473	4,399	306,586
Designated funds	158,662	-	-	158,662
	<u>277,376</u>	<u>183,473</u>	<u>4,399</u>	<u>465,248</u>
Restricted funds				
Activity Fund	780	(700)	-	80
Baildon Buddies	1,831	(276)	-	1,555
Baildon Communities Together	10,223	(62)	-	10,161
Baildon Youth	2,129	1,421	-	3,550
Brelms Trust	854	-	(854)	-
Community Games (Yorkshire Sport)	231	-	(231)	-
Kickstart 2021	1,897	-	(1,897)	-
MAST	(2,000)	2,804	-	804
National Lottery Community Fund - Befriending	491	3,927	-	4,418
National Lottery Community Fund - Covid	425	-	(425)	-
NHS Engagement Project	29,996	(15,337)	-	14,659
NHS Heart Foundation	130	-	(130)	-
NHS Social Prescribing	6	-	(6)	-
Self Care Champion	624	2,494	-	3,118
Social Groups 2019	6,343	-	-	6,343
Sovereign Healthcare	265	-	(265)	-
VCS Alliance - HPOC	294	-	(294)	-
VCS Support Wellbeing	22,494	(21,159)	-	1,335
Warm Homes 2019 - 2021	297	-	(297)	-
Warm Homes 2021 - 2024	2,517	2,929	-	5,446
	<u>79,827</u>	<u>(23,959)</u>	<u>(4,399)</u>	<u>51,469</u>
TOTAL FUNDS	<u>357,203</u>	<u>159,514</u>	<u>-</u>	<u>516,717</u>

Notes to the Financial Statements - continued
for the Year Ended 31st March 2023**16. MOVEMENT IN FUNDS - continued**

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	1,226,282	(1,042,809)	183,473
Restricted funds			
Activity Fund	-	(700)	(700)
Baildon Buddies	-	(276)	(276)
Baildon Communities Together	-	(62)	(62)
Baildon Youth	10,001	(8,580)	1,421
MAST	69,545	(66,741)	2,804
National Lottery Community Fund - Befriending	53,782	(49,855)	3,927
NHS Engagement Project	-	(15,337)	(15,337)
Self Care Champion	13,090	(10,596)	2,494
VCS Support Wellbeing	1,374	(22,533)	(21,159)
Warm Homes 2021 - 2024	28,003	(25,074)	2,929
	<u>175,795</u>	<u>(199,754)</u>	<u>(23,959)</u>
TOTAL FUNDS	<u><u>1,402,077</u></u>	<u><u>(1,242,563)</u></u>	<u><u>159,514</u></u>

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

16. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1/4/21 £	Net movement in funds £	Transfers between funds £	At 31/3/22 £
Unrestricted funds				
General fund	233,981	39,395	4,000	277,376
Restricted funds				
Activity Fund	1,000	(220)	-	780
Baildon Buddies	2,644	(813)	-	1,831
Baildon Communities Together	7,328	2,895	-	10,223
Baildon Youth	1,770	359	-	2,129
Brelms Trust	854	-	-	854
Community Games (Yorkshire Sport)	-	231	-	231
Holiday Activity	241	(241)	-	-
Kickstart 2021	-	1,897	-	1,897
MAST	-	(2,000)	-	(2,000)
National Lottery Community Fund - Befriending	658	(167)	-	491
National Lottery Community Fund - Covid	1,393	(968)	-	425
NHS Engagement Project	21,785	8,211	-	29,996
NHS Heart Foundation	350	(220)	-	130
NHS Social Prescribing	1,490	(1,484)	-	6
Self Care Champion	-	624	-	624
Social Groups 2019	7,617	(1,274)	-	6,343
Sovereign Healthcare	1,457	(1,192)	-	265
VCS Alliance - HPOC	294	-	-	294
VCS Support Wellbeing	-	26,494	(4,000)	22,494
Warm Homes 2019 - 2021	597	2,217	-	2,814
Westcliffe Health Centre	4,180	(4,180)	-	-
	<u>53,658</u>	<u>30,169</u>	<u>(4,000)</u>	<u>79,827</u>
TOTAL FUNDS	<u>287,639</u>	<u>69,564</u>	<u>-</u>	<u>357,203</u>

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

16. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	698,313	(658,918)	39,395
Restricted funds			
Activity Fund	-	(220)	(220)
Baildon Buddies	2,985	(3,798)	(813)
Baildon Communities Together	10,032	(7,137)	2,895
Baildon Youth	11,035	(10,676)	359
Community Games (Yorkshire Sport)	300	(69)	231
Holiday Activity	-	(241)	(241)
Kickstart 2021	20,079	(18,182)	1,897
MAST	-	(2,000)	(2,000)
National Lottery Community Fund - Befriending	53,050	(53,217)	(167)
National Lottery Community Fund - Covid	-	(968)	(968)
NHS Engagement Project	87,500	(79,289)	8,211
NHS Heart Foundation	-	(220)	(220)
NHS Social Prescribing	-	(1,484)	(1,484)
Self Care Champion	14,333	(13,709)	624
Social Groups 2019	5,651	(6,925)	(1,274)
Sovereign Healthcare	-	(1,192)	(1,192)
VCS Support Wellbeing	26,494	-	26,494
Warm Homes 2019 - 2021	9,752	(7,535)	2,217
Westcliffe Health Centre	-	(4,180)	(4,180)
	<u>241,211</u>	<u>(211,042)</u>	<u>30,169</u>
TOTAL FUNDS	<u>939,524</u>	<u>(869,960)</u>	<u>69,564</u>

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

16. MOVEMENT IN FUNDS - continued

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

	At 1/4/21 £	Net movement in funds £	Transfers between funds £	At 31/3/23 £
Unrestricted funds				
General fund	233,981	222,868	8,399	465,248
Restricted funds				
Activity Fund	1,000	(920)	-	80
Baildon Buddies	2,644	(1,089)	-	1,555
Baildon Communities Together	7,328	2,833	-	10,161
Baildon Youth	1,770	1,780	-	3,550
Brelms Trust	854	-	(854)	-
Community Games (Yorkshire Sport)	-	231	(231)	-
Holiday Activity	241	(241)	-	-
Kickstart 2021	-	1,897	(1,897)	-
MAST	-	804	-	804
National Lottery Community Fund - Befriending	658	3,760	-	4,418
National Lottery Community Fund - Covid	1,393	(968)	(425)	-
NHS Engagement Project	21,785	(7,126)	-	14,659
NHS Heart Foundation	350	(220)	(130)	-
NHS Social Prescribing	1,490	(1,484)	(6)	-
Self Care Champion	-	3,118	-	3,118
Social Groups 2019	7,617	(1,274)	-	6,343
Sovereign Healthcare	1,457	(1,192)	(265)	-
VCS Alliance - HPOC	294	-	(294)	-
VCS Support Wellbeing	-	5,335	(4,000)	1,335
Warm Homes 2019 - 2021	597	2,217	(297)	2,517
Westcliffe Health Centre	4,180	(4,180)	-	-
Warm Homes 2021 - 2024	-	2,929	-	2,929
	<u>53,658</u>	<u>6,210</u>	<u>(8,399)</u>	<u>51,469</u>
TOTAL FUNDS	<u>287,639</u>	<u>229,078</u>	<u>-</u>	<u>516,717</u>

HALE HEALTH ACTION LOCAL ENGAGEMENT

Notes to the Financial Statements - continued for the Year Ended 31st March 2023

16. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	1,924,595	(1,701,727)	222,868
Restricted funds			
Activity Fund	-	(920)	(920)
Baildon Buddies	2,985	(4,074)	(1,089)
Baildon Communities Together	10,032	(7,199)	2,833
Baildon Youth	21,036	(19,256)	1,780
Community Games (Yorkshire Sport)	300	(69)	231
Holiday Activity	-	(241)	(241)
Kickstart 2021	20,079	(18,182)	1,897
MAST	69,545	(68,741)	804
National Lottery Community Fund - Befriending	106,832	(103,072)	3,760
National Lottery Community Fund - Covid	-	(968)	(968)
NHS Engagement Project	87,500	(94,626)	(7,126)
NHS Heart Foundation	-	(220)	(220)
NHS Social Prescribing	-	(1,484)	(1,484)
Self Care Champion	27,423	(24,305)	3,118
Social Groups 2019	5,651	(6,925)	(1,274)
Sovereign Healthcare	-	(1,192)	(1,192)
VCS Support Wellbeing	27,868	(22,533)	5,335
Warm Homes 2019 - 2021	9,752	(7,535)	2,217
Westcliffe Health Centre	-	(4,180)	(4,180)
Warm Homes 2021 - 2024	28,003	(25,074)	2,929
	417,006	(410,796)	6,210
TOTAL FUNDS	2,341,601	(2,112,523)	229,078

16. MOVEMENT IN FUNDS - continued

Restricted funds:

Activity fund - For design and print of Activity Leaflets and postcards.

Baildon Buddies - Project to deal with isolation and social aspects.

Baildon Communities Together - Towards the Baildon Communities Together project.

Baildon Youth - Youth Work funded by Baildon Town Council.

Brelms Trust - Towards the costs of a Lead Worker to support young people, vulnerable to being groomed or sexually exploited.

Community Games - To support local social group activities.

Kickstart 2021 - Funding from DWP for staff employment and training costs.

MAST - Social Prescribing into the MAST (Multi Agency Support Team) to support individuals presenting at the ED at Airedale and BRI.

National Lottery Community Fund : Covid - Towards resources for young people.

National Lottery Community Fund : Befriending - Towards the costs of the befriending project.

NHS Engagement project - Improving conversations with communities about Health Services.

NHS Heart Foundation - Community Blood pressure testing scheme.

NHS Social Prescribing - Pilot project funding to work with local GP practices to offer social prescribing solutions for local people.

VCS Alliance HPOC - Towards the costs of a befriending service.

VCS Support - To support with I.T upgrade to support the growing and development I.T requirements at HALE. the transfer relates to the purchase of fixed assets to be depreciated in unrestricted funds.

Self Care Champion - Work within GP practice to promote self care within community and existing services.

Social groups - Funding from a variety of sources towards the costs of social groups.

Sovereign Healthcare - Towards staffing costs.

VCS Support Wellbeing - Local Authority Restart and Support Grant To support the continuation of virtual/telephone and doorstep support whilst re-establishing community based social support and wellbeing activities

Warm Homes 2019 to 2021 - Towards healthy eating and active citizens activities.

Warm Homes 2021 to 2024 - Various outreach projects involving Children's Centres, Supermarket, Day Care Centres

16. MOVEMENT IN FUNDS - continued

Westcliffe Health Centre - Towards the Self care Champions project

17. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31st March 2023.

18. FRC ETHICAL STANDARD - PROVISIONS AVAILABLE FOR SMALL ENTITIES

In common with many other businesses of our size and nature we use our auditors to prepare and submit returns to the tax authorities and assist with the preparation of the financial statements.

19. ULTIMATE CONTROLLING PARTY

The charity is under the control of the board of trustees.