

ILKLEY AND DISTRICT GOOD NEIGHBOURS

**ANNUAL REPORT
2022 – 2023**



ILKLEY AND DISTRICT GOOD NEIGHBOURS

The Management Committee present their Report and Accounts for the financial year 1 April 2022 to 31 March 2023.

Objectives and Activities

Our continuing aim is to support independent living and improve the lives of elderly and vulnerable people in the Ilkley District.

Risk Management

The Trustees have a risk management strategy which comprises;

- An annual review of the risks the charity may face
- The establishment of systems and procedures to mitigate any risks identified in the review
- The implementation of procedures and actions designed to minimise any potential impact on the charity

A key element in the management of financial risks is the setting of a reserves policy which is regularly reviewed by trustees and the drawing up of a financial procedures document. Procedures are in place within the Good Neighbours office to ensure compliance with the health and safety of staff, volunteers and individuals from member groups.

ILKLEY AND DISTRICT GOOD NEIGHBOURS TRUSTEES 2022/2023

Ed Duguid	Chair
Penny Coulthard	Vice Chair
Jim Manson	Vice Chair
Ian Wilson	Hon Treasurer
Pamela Brunger	Hon Secretary
John Jewitt	Company Secretary
(deceased August 2022)	
Liz Binns	
John Bray	
Anita Dunford	
Judy Hutton	
Simon Settle	

Councillor Peter Mate represented Ilkley Parish Council at meetings of the Committee

HON PRESIDENT

Brian Mann

MANAGER

Lucy Steer

BEFRIENDING CO-ORDINATOR

Helen Hawney

SHOPASSIST CO-ORDINATOR

Charlotte Atkinson

MOVING ON CO-ORDINATOR

Hannah Walton

Chair's Report

This Annual Report covers the period April 2022 – March 2023. Gradually we have edged our way back to a degree of normality following the Pandemic. Nevertheless, for some of our clients, life has continued to have its difficulties with a little bit of nervousness about social mixing and some who continue to be reluctant to go to the shops and other public spaces. We have therefore continued to reflect this in our services where we can. In other parts of this report we cover the range of our activities and report on how things are progressing. It is, however, important for me to say that none of these activities could be delivered without the three parts of our delivery team, our trustees, our staff and, of course, our volunteers.

There are currently 10 trustees who oversee the work and performance of the charity. All are, of course, volunteers, giving their time freely.

Most poignantly we lost John Jewitt, who sadly passed away after illness. John can be described as a true stalwart of Ilkley and District Good Neighbours. He was there at its inception and despite his own challenges provided a steady hand to the last. John had been Chairman of IDGN but also of Ilkley Community Transport and therefore his contribution to Ilkley as a whole was considerable. His wise counsel will be greatly missed.

As mentioned in the last Annual Report we were joined by Ian Wilson at the last AGM. Ian has almost seamlessly taken over the role of Treasurer from Peter Kierman, who carried out the role for many years. This is an onerous role and Ian is overseeing a modernisation of our accounting systems.

We are currently looking to recruit new trustees to add to the skills on our Committee, particularly in Health and Social Care.

The staff team of Helen Hawney (Befriending), Charlotte Atkinson (ShopAssist) and Hannah Walton (Moving On Friendship Group) are ably led by Lucy Steer, our Manager, and we are most grateful for their hard work and dedication, which keeps our operations running smoothly week in, week out.

They are very much a team and it is good that they continue to challenge the trustees to look at new ways to deliver our services. During the last year we have run a pilot on a possible new service and as a result of the team's discussions we are now running a research project to examine how IDGN can best respond to the increasing issues surrounding Dementia. As an organisation we realise we cannot stand still but in this challenging financial environment we have to balance the need for change with the need for stability.

Currently we have 90 volunteers and of course we could not deliver any of our services without them. In the last year we have focused on providing more support for them. We have developed a Volunteer Handbook to provide them with better information as well as a Volunteer Portal on our website so they can access all the relevant policies and guidance they might need in the course of their volunteering tasks. Several training sessions have been run for them.

We now have regular “Get-Togethers” so staff, trustees and volunteers can meet up and chat over a coffee (or mulled wine and a mince pie at Christmas!). Whilst the value of our volunteers is more certainly in the sense of well-being they bring to our clients, we also would like them to enjoy and gain satisfaction from their work at IDGN. We thank them greatly.

I think I can again reiterate the message of our previous Chair that we are all feeling optimistic about the year ahead; with strong staff, trustee and volunteer teams, and we continue to explore new opportunities to help our community as well as improving and growing the existing services.

We are indeed proud to be part of the Ilkley community and making a difference to those we can support.

Ed Duguid
Chair

Manager's Report

This year the team has continued to go from strength to strength and there have been many highlights throughout the year. We have enjoyed a more normal working environment, working face to face. Whilst online has its place for convenience and has been necessary over the past two years, we have been able to build better working relationships and team projects working cohesively in this manner. We have strengthened many processes with a strong recruitment procedure offering volunteers a great start with valuable information for a happy and strong journey with IDGN.



The Team from L-R, Helen, Lucy, Charlotte & Hannah

There are still a small handful of clients who are very isolated and resistant but the majority have happily jumped in to all opportunities offered.

The Walk & Talk pilot has now finished and a final report has been issued. We have been encouraged by those who have accessed the programme, and although it has been a slow growth, the feedback has been fantastic. It proves to be a fantastic offering from IDGN.

I have continued to establish my position to develop and grow IDGN and the importance of our position within the Community. We have a strong voice within the Wharfedale & Silsden Community Partnership as part of the Leadership Team and the Lead Anchor for the Voluntary, Community and Social Enterprise in the area.

We continued our great relationships with the Ilkley Health Forum, working with Carers Resource, Social Prescribers, Ilkley Parish Council, Community Action and Dementia Friendly Ilkley Action.

I'd like to thank all Trustees for their support during the year, in guiding the organisation and me.

This year we have upgraded CharityLog, our database, to gain more functionality. This has mainly been an advantage for managing groups and events as we are now able to record attendances and monitor uptake of these offerings. We are now also able to create forms to capture IDGN-specific information about our clients and volunteers.

We can tailor the system to fit the IDGN model and way of working. We are also able to run reports on this information at the touch of a button.



Last year we finally hosted our annual over 90s party for the first time since the pandemic. We were honoured to have the attendance of Suzanne Watson, Deputy Lord Lieutenant, Robbie Moore MP, Isabel Ashman, Ilkley Town Crier and Mark Stidworthy, Ilkley Town Mayor. We had

wonderful entertainment from Ilkley Amateur Operatic Society, Steph Atkinson on Sax and Ilkley Moor Notes. The Clarke Foley were wonderful hosts and Ilkley Community Transport safely delivered the attendees to and from their homes. We can't thank all our wonderful volunteers enough for all their support on the day, we couldn't have done it without them. A fantastic day was had by all with many saying it was the highlight of their year. We look forward to hosting again this year.



Our Volunteers are truly the back bone of the organisation without whom we would be unable to deliver the schemes. We have enjoyed many Volunteer get togethers with a Christmas party at The Manor House with mulled wine and mince pies. We continue to develop our Newsletter and issue on a quarterly basis with lots of information and thanks. We realise how blessed we are when many other small organisations have struggled to recruit and retain their volunteers. We thank them all from the bottom of our hearts.

Overall, it has been a fantastic 12 months with IDGN going from strength to strength.

Lucy Steer
Manager

Befriending

Ilkley and District Good Neighbours currently has a dedicated team of 30 volunteer befrienders who each regularly visit an older person living independently to provide companionship and help alleviate loneliness and/or social isolation which can be felt as a result of bereavement, relocation, health issues or a change in other circumstances.

Befriending landscape

Over the last year the landscape in which we operate has changed – we are fortunate to have secured further funding when a number of similar befriending schemes in West Yorkshire, and nationally, have closed. The NHS along with many other services, have struggled to function as effectively, other services have stopped altogether or are severely stretched, and as a result the referrals we receive for befriending have increased in number and become more complex, taking more time to assess and, if appropriate for the scheme, manage, including referring to other services. We are extremely lucky, however, to find that new volunteers continue to seek us out with the befriending team continuing to grow.

Befriending Statistics '22-'23

Over the last year, 35 volunteers have supported:

- ✓ 38 lonely older people
- ✓ with 570 face to face visits (an increase of 68% on last year)
- ✓ and over 168 phone calls (a decrease of 72% on last year)

It is encouraging to see the number of face to face visits increase and the number of telephone befriending interactions decrease as we continue to emerge from the pandemic.

The short case studies below provide real examples of the effect befriending has recently had on our clients – whilst the scheme is all about providing companionship befrienders have also offered support in other ways too:

Technology assistance - M and P were matched just before Christmas for home visits. M is very frail and largely housebound. They have really enjoyed getting to know each other and P has used her IT skills to help M use her mobile phone to contact her grand-daughter on WhatsApp and help facilitate video calls on facetime, meaning that M has had video calls with her great grand daughter, whom she rarely sees in person. M is now also able to access photos and videos her grand daughter has sent of her great grandchildren. The volunteer says '*her face lights up when she sees them – it's just lovely.*' M has enjoyed getting to know someone who is '*considerably younger than me*' – something that was initially a bit of a concern for her, but she has found they have various things in common like teaching careers and a love of travel.

Support with reading/visual material & emotional support - A is 97, lives alone and is registered blind and largely housebound. Her befriender visits each week and reads through all the post and letters from A's daughter who lives abroad, and the local

newspaper, as well as helps her compile a shopping list so that her volunteer shopper can pick it up later in the week. Apart from these practical tasks, the befriender has become someone that A can trust, and when there was a fire in the building, the befriender was able to support her emotionally during what was a really difficult time. Our befrienders continue to make a lasting difference to local people – helping to raise self-esteem, maintain independence and improve quality of life. It is surprising how even a short visit once a week can make a difference and help isolated older people 'connect' with the community around them and help them feel more confident and valued, as demonstrated by the feedback below:

'I'm enjoying visits, we get on well and times flies when P is here. Thanks to IDGN for all your help, you are very well organised and function really well as a team. I am delighted with both shopping and befriending support.'



B, client

'J and I have so much in common, we are like two old slippers! I am really very content with my life at the moment.' J, client

'Thank you so much for the help you and your volunteer have given us. It is hard for us living so far away having you and your team is such a blessing to us. Thank you once again.' P, family of client, J.

'I feel I have a real connection with my client who is now just part of my extended family, and what started as a way

that I could give back to the community has now become very much a two-way process, where I feel I benefit from her friendship as much as she does from mine. I cannot imagine life without her!' SW, volunteer



Thanks must go to the volunteer befriending team who deliver this service. Without these incredible, dedicated volunteers who always go the extra mile, we would be unable to make a difference to older people's lives.

Training

This year we have developed a training schedule for all our volunteers to develop their knowledge and skills to help them better support themselves and their clients. We have taken advantage of the British Red Cross free group volunteer training opportunities, and have run face to face workshop sessions on how to support those experiencing loneliness, as well as adapting and recovering from a crisis, be that a fall, coming out of a pandemic, or another life event.

These small workshop style events have been received well by our volunteers:

'Another well run and informative session that will be so useful when visiting my client.' Volunteer P

'Thank you for running this workshop which has provided tools that I can put to good use, both as a volunteer and in my personal life.' Volunteer C

Further face to face volunteer training including dementia awareness and basic first aid, both planned for the summer, contribute to an annual calendar of ongoing training and development opportunities for our volunteers.

Helen Hawney
Befriending Co-ordinator

ShopAssist Report

The year in numbers

As of the end of March 2023, the ShopAssist scheme supports 30 clients, who each receive a weekly or fortnightly (at their request) shop. These are provided by 23 regular volunteers and a cohort of 8 ad hoc volunteers.

Over the full financial year, we have provided regular shopping support to 35 clients with Shop and Drop and 13 clients with ShopAssist. Over the same time period, we have been supported by 49 volunteers. On average, each month, we have delivered 83 shops and accompanied clients on 20 shops. This equates to a total of 1236 shops in 2022-23.

In **2022-23**,

IDGN ShopAssist

shopped **1236** times,

supporting **48** clients with

the help of **49** volunteers

This year has brought about a noticeable shift from Shop & Drop, started during the pandemic, to the original ShopAssist service. More people are wanting to shop for themselves with help and maintain their independence. Shop & Drop remains a valuable scheme for those clients who are house-bound or whose mobility deteriorates either temporarily or permanently.

What the clients think



The success of the ShopAssist scheme can be exemplified by the match between Eva Phillips (L), volunteer, and Margaret Metcalf (R), shopper.

They have been shopping together since June 2021 and in September 2022, spoke about their experiences of the scheme.

“I had no concerns about meeting my volunteer as I knew Good Neighbours would check them out for me. Eva and I got on straight away and I was grateful for the

chance to keep going to the supermarket myself. I was adamant I did not want someone to do my shopping for me. I want to be as independent as possible and make my own choices.”

It's much more than just a shop for Margaret and Eva. “Most weeks, if I've got time, I'll stop for a coffee afterwards and we'll put the world to rights” says Eva. “I really look forward to my weekly outings” adds Margaret, “they give me a different person to talk to, I bump into other friends when I'm out and it simply opens up my world.”

Eva is enjoying volunteering with IDGN: “I have genuinely really enjoyed the volunteering I have done, I have met such wonderful and interesting people. The great thing about this type of volunteering is that it's flexible. M and I can move the day and time we shop to suit ourselves and if I'm away for a week or two, Charlotte will arrange cover so Margaret doesn't miss out.” Since December 2022, Margaret's mobility has declined and she has become reliant on IDGN's Shop & Drop scheme. This is still delivered by Eva so the two of them still get a chance to chat and because Eva has shopped with Margaret for so long, she knows exactly what items to buy when she is shopping without Margaret. This means Margaret is getting a truly personalised

service and has retained some of the social interaction she was enjoying with ShopAssist.

Margaret is determined to improve her mobility and is receiving physio with a view to getting back into the shops with Eva before too long. Providing this flexibility to suit the needs of its clients is something IDGN prides itself on.

Working with Volunteers



We have received fantastic commitment and dedication from our volunteers, who continue to go above and beyond for their clients.

In return we have worked hard as a team to ensure we have resources



available to the volunteers to make their involvement with IDGN as straight-forward as possible. A new Volunteer Handbook has been published and given out to all new volunteers as part of their induction.



We have also hosted a number of volunteer get-togethers with the aim of creating a community among our volunteers who typically work alone. We had a very successful summer gathering in July and a festive evening in early December.

We have created a flyer to attract new volunteers and published numerous newsletters to existing volunteers to keep them up to date with everything going on at IDGN.

Feedback

The ShopAssist service is a lifeline for our clients, as demonstrated by the feedback received in the last year:

"My brother and I know what a fantastic service Shop Assist was for our mother"
JS, NoK

"To everyone at Good Neighbours, thank you for all your help and assistance during the year"
SH, Shop & Drop client

"You have no idea how it's improved my eating, the ability to choose [my own food]"
OD, ShopAssist client

"E is like a ray of sunshine. She goes above and beyond anything you would expect from a volunteer and is such a kind lady. She is like a fairy godmother, ...wonderful"
SR, Shop & Drop client

Charlotte Atkinson
ShopAssist Co-ordinator

Moving On Friendship Group Report

The Moving On Friendship Group is Ilkley Good Neighbours' social and signposting group. It meets on a weekly basis on a Friday afternoon in the Clark Foley Centre. The purpose of our group is (1) to encourage contact with others, to reduce isolation and loneliness, (2) to provide signposting and support to facilitate independent living and (3) provide information on a variety of subjects to support good mental health and well-being.

The group has been running for many years now and it still has many members who were there on the very first day (we still have many of our original volunteers helping out too!). In fact, one member said "Moving On was just starting when I moved to Ilkley - very glad I joined, best thing I did!". We started using Charity Log to record information about attendance of the group in September 2022 and since this time we have helped at least 53 people in the group with a total of 674 attendance by our members. This is testament to the warm and welcoming nature of the group and the people who attend.

As well as serving a social function, the Moving On Friendship Group is a great way of sharing local information and resources to multiple people. This is done by communicating relevant information each week by way of announcements and presentations. As Co-ordinator, I keep on top of current local events and news and share it within the group and by email, where appropriate.

We also regularly get interesting and helpful speakers in to talk to the group. These talks can be on topics relating to health and wellbeing or just topics that are interesting and entertaining in themselves. From a more educational and informative point of view, our speakers have talked on various topics, including:

- advice on preventing financial crimes and keeping safe from fraud;
- estate planning;
- Ilkley and West Yorkshire Fire Services advising on fire safety in the home;
- local resources for people with sight issues, including the Ilkley Talking Newspaper, the Insight Group and an overview on eye health;
- hearing advice from a local audiologist;
- other local organisations who focus on providing care and support to older people; and
- a talk from the Social Prescriber on mindfulness and other areas.

One particularly useful and regular talk is by the Falls Prevention Service of Bradford District Care Foundation Trust. They gave valuable advice on how to prevent falls and what to do should you fall. Unfortunately, several members have had falls over the year and many have said that they felt better able to deal with the situation because of the information given in the group.

We have also been able to welcome local officials to the group, including Robbie Moore MP and Mark Stidworthy, then Mayor of Ilkley. This gave members an opportunity to hear from the people who represent them and a chance to share their views on local events and issues.

We have also had many superb speakers attend to share their life and community experiences. Many of these talks gave an insight into some of the great local organisations that do really good work for the community. These speakers included:

- the Ilkley Clean River Group talking about the work they do in protecting the river Wharfe;
- a talk about the history of the Manor House;
- chat and dog cuddles with the representatives (human and canine) from Hearing Dogs for Deaf People and Guide Dog charities;
- talks from some very keen cyclists including a jaunt up Mount Ventoux and a charity cycle ride all across America;
- one of our own volunteers gave a fascinating talk on her Grandfather's World War 1 diaries as a conscientious objector and also an insight into Quaker weddings; and
- a recent talk on Palestine and its people.



I would like to take this opportunity to thank everyone who has taken the time to speak to the group. The quality of all the speakers and their content has been excellent.

I try to help my members with any specific queries or concerns that they have. This is often particularly helpful in their use of email, the internet and associated technology. In some cases, a

useful 1-2-1- chat can blossom into a useful presentation for the group e.g. questions about Attendance Allowance led to an information session on the subject as many people were not aware they may be eligible to claim.

The group continues to be well attended and well thought of. We regularly obtain feedback to ensure our service meets members' needs and the general response is how much they enjoy the group because it is "friendly and welcoming", "excellent, friendly, genuine", "relaxed", "helpful" and "informative" with "good local information". We have had to set up a waiting list for the group this year as demand has grown as our reputation as a friendly and welcoming group has spread. We are looking at possible ways of expanding our capacity moving forward.



Margaret - a long-serving Moving On Friendship Group volunteer



Eileen - one of our original members

Finally, the Moving On Friendship Group would not be possible without the assistance of our wonderful volunteers who support and help regularly. My particular thanks to our regular volunteers Margaret, Alice, Mick, Pam, Jo, Yvonne and trustee, Anita Dunford, who have all been invaluable this past year both to Ilkley and District Good Neighbours and the members they support.

Hannah Walton
Co-ordinator, Moving On Friendship Group

Financial Admin Role

The financial administration of the charity has changed over the past year as we became less paper based and more online. We have recently started using quick Books to manage the charity's financial transactions. In respect of Shop and Drop, this means we have adapted our client facing processes so that we can take advantage of Quick Books' usability. The benefit of this is that our financial records are more accessible and comprehensive across the charity.

Hannah Walton
Admin Assistant

SOCIAL EVENTS REPORT

The Good Neighbours Social Events project has been established for several years. The purpose of the project is to enable and encourage our clients to have social contact with others. This helps to reduce isolation and loneliness and helps support our clients' good mental health.

Scenic Dales Drive and Afternoon Tea Event

After a gap of three years, we were able to resume our annual Yorkshire Dales Scenic Drive followed by an Afternoon Tea event. Due to the number of clients who wanted to attend we undertook three separate trips throughout the Spring and Summer months.

After a lovely drive in the Dales, courtesy of Ilkley Community Transport volunteers, we were able to finish off with a splendid afternoon tea at the Cavendish Pavilion on Bolton Abbey estate, which we all thoroughly enjoyed.

Funding for this event, which we offer free of charge to our clients, was from a £500 grant from Magic Little Grants, which provides funding to local groups and charities, and a donation of £500 from local solicitors Walker Foster.



A Trip to Kettlewell Scarecrow Festival

In August we also resumed a much-loved annual trip to Kettlewell Scarecrow Festival using two Ilkley Community Transport buses and volunteer drivers. We all had a wonderful day walking around the village searching for clues, and scarecrows, as part of the Scarecrow Trail.

Christmas Lunch Event

Our two annual Christmas Lunch events were held during December at the Audley Restaurant in Ben-Rhydding. The facilities at the Audley are ideal for our Christmas Lunch

and the setting was extremely festive. The quality of the food was superb, and everyone said how much they had enjoyed the event.



Pantomime

This year the Ilkley Upstagers presented Cinderella as their annual pantomime offering. The production was outstanding and the music, singing, acting, costumes and humour were incredible. We had a fabulous afternoon and received so much positive feedback from all who attended.

Our Christmas Lunch and Pantomime trip was only possible due to a much-appreciated donation from Ilkley Round Table, who in recent years has provided funding to enable our festive events to happen.

I am pleased to report that we have been able to offer these events to clients from our Moving On Friendship Group, and our ShopAssist and Befriending Projects. I would like to thank Lucy, Hannah, Charlotte, and Helen for their support with this. Finally, these events, which are so vital to our older community, would not have taken place without the wonderful support of our team of volunteers and the volunteers of Community Transport who support us at many of our events.

Anita Dunford
Trustee

Christmas Delivery Project

“Mrs P called to thank Good Neighbours for the lovely bag of Christmas treats. She was especially delighted meeting the IGS girls who were charming and talked about their future plans and studies. She does not have grandchildren, which made the chat even more enjoyable”.

Just one of the many “thank you” messages, following the delivery of a Christmas gifts of a beautiful potted plant of a bag of Christmas treats to 84 of the elderly residents from Ilkley, Addingham and Burley in Wharfedale. This is now a fantastic tradition which is always appreciated by the people we were set up to support, in addition to the other services we provide for them.

Last year because of the Pandemic one of the highlights of this annual Christmas event, the involvement of students from Ilkley Grammar had not been possible. This year they were back!



In addition, none of this would be possible without the fantastic support we receive from the local community and businesses. This included the Rotary Club of Ilkley Wharfedale, Olicana Masonic Lodge, Tesco, Erica Berry, Florists, and Ilkley Community Transport. A particular thank to the Ilkley Round Table who funded this year's event

This was another great example of local organisations working together to benefit our vulnerable neighbours.

Ed Duguid
Chair

HOME AND GARDEN ASSIST REPORT

HAGA is the gardening, small home maintenance and decorating service we operate for elderly people and anyone with disabilities.

As the impact of Coronavirus has declined there has been a slight increase in the number of jobs carried out this year, as illustrated in the following chart:

TYPE OF JOB	2021/2022	2022/2023	% Change
Gardening	3	5	66.67%
Home Maintenance	10	10	0%
Decorating	1	0	(100%)
General Help	1	3	200%
Total Jobs	15	18	20%

As usual, the jobs varied from changing light bulb changes, many gardening requests, repairing fencing, key safe fitting, hand rails, blinds hanging, furniture moving and many more.

Our thanks go to our wonderful volunteers.

Lucy Steer

Ilkley and District Good Neighbours

Charity number 1126267

A company limited by guarantee number 06802173

Annual Report and Financial Statements for the year ended 31 March 2023



West Yorkshire Community Accounting Service

Ilkley and District Good Neighbours

Annual Report and Financial Statements for the year ended 31 March 2023

Contents	Page
Trustees' report	2 to 6
Examiner's report	7
Statement of financial activities	8
Balance sheet	9
Notes to the accounts	10 to 13

Prepared by West Yorkshire Community Accountancy Service CIO

Ilkley and District Good Neighbours

Trustees' report for the year ended 31 March 2023

Reference and administrative details of the charity, its trustees and advisors

The trustees during the financial year and up to and including the date the report was approved were:

Name	Position	Dates
Edward Duguid	Chair	
Penelope Coulthard	Vice-Chair	
James Manson	Vice-Chair	
Pamela Brunger	Secretary	
Peter Kierman		Resigned June 2022
Judith Hutton		
Elizabeth Binns		
John Bray		
Anita Dunford		
John Jewitt		Deceased August 2022
Ian Wilson	Treasurer	Appointed June 2022
Simon Settle		

Charity number 1126267 Registered in England and Wales

Company number 06802173 Registered in England and Wales

Registered and principal address

Riddings Hall
Riddings Road
Ilkley
LS29 9LU

Bankers

HSBC Bank PLC
1 Wells Road
Ilkley
LS29 9JB

Hampshire Trust Bank
PO Box 74003
London
EC2P 2QR

Lloyds Bank PLC
8 Cambridge Cres.
Harrogate
HG1 1PQ

Cambridge & Counties Bank
Charnwood Court
5B New Walk
Leicester LE1 6TE

United Trust Bank
One Ropemaker Street
London
EC2 9AW

Redwood Bank Ltd
The Nexus Bldg
Broadway
Letchworth SG6 3TA

Independent examiner

Katy Sargeant ACA

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

The charity is a company limited by guarantee and was formed on 27 January 2009. It is governed by a memorandum and articles of association (as amended by special resolution 23 October 2014 and 20 May 2015). The liability of the members in the event of the company being wound up is limited to a sum not exceeding £10.

Method of recruitment and appointment of 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.

Ilkley and District Good Neighbours

Trustees' report (continued) for the year ended 31 March 2023

Objectives and activities

The charity's objects

To promote any charitable purposes for the benefit of the community in Ilkley, Addingham, Burley-in-Wharfedale and Menston in the local government district of Bradford Metropolitan District Council and its neighbourhood.

The charity's main activities

Support independent living, alleviate loneliness and improve the lives of older and vulnerable people in the Ilkley District.

Public benefit statement

In setting our objectives and planning our activities our Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular supporting elderly and vulnerable people.

John Jewitt

Very sadly in August 2022 we lost John. He was a long term, active trustee of the charity and will be missed.

Achievements and performance

Ilkley and District Good Neighbours has continued to run schemes to relieve isolation, promote economic well-being, maintain independence and stronger mental health. Following the Covid Pandemic we have continued to offer the Shop and Drop scheme for clients who did not feel confident to return to Shop Assist. We are currently supporting 35 clients with Shop and Drop and 13 clients with Shop Assist. There is still some reluctance for some clients to return to shopping for themselves, but this is slowly increasing month on month.

The Moving On Friendship Group has returned to their pre-pandemic arrangements with weekly meetings, a range of speakers and time to socialise. There is more demand than ever before, constantly achieving maximum numbers week on week. We currently have 48 people registered with the scheme and have a waiting list. The average number of attendees is 27 per week.

Befriending supported an average of 27 clients with almost all now being face-to-face and only 1 continuing by telephone. This is a huge increase on the previous 12 months, where there was still some resistance to return to face-to-face. Over the past 6 months, the befriending project has seen a total of 27 volunteers provide 300 face-to-face visits (a total of 322 hours) and 49 calls (a total of 10 hours) to older isolated people in the Ilkley area, totalling 349 interactions. Over the last year we have seen 738 interactions (570 face-to-face visits and 168 calls).

During the year we have continued to pilot a Walk and Talk scheme aiming to support those lacking in confidence to be more active and take a social walk with a volunteer. The progress so far is being reviewed to see how the service may continue.

The Social Events programme has included mini bus trips with scenic drives for afternoon tea, the Kettlewell Scarecrow festival, as well as the Christmas lunch at Audley Clevedon and Upstagers' pantomime performance.

The Over Nineties party was able to take place in September for the first year since the pandemic and more than 70 attended at the Clarke Foley centre for food, drink, music and entertainment.

Christmas Parcels were delivered to 84 IDGN clients with support from a wide variety of local organisations. Parcels were delivered to clients by students from Ilkley Grammar School accompanied by volunteers from IDGN and Ilkley Wharfedale Rotary Club.

The Home and Gardens (HAGA) scheme has handled many requests, with volunteers carrying out jobs including light bulb changes, gardening, repairing fencing, key safe fitting, hand rails, blinds hanging and furniture moving.

Ilkley and District Good Neighbours

Trustees' report (continued) for the year ended 31 March 2023

Achievements and performance continued

We are most grateful to the following for financial support provided during the year:

- City of Bradford – second year of Day Opportunities grant
- Give Bradford – Strategic Development grant
- Ilkley Round Table
- WW Spooner Charitable Trust
- Local Giving
- Donations in memory of John Jewitt
- Donations from clients and other supporters

Finally, we would like to offer our grateful thanks to our many volunteers without whom we would be unable to operate.

Financial review

The net expenditure for the year was £29,641, including net expenditure of £17,077 on unrestricted funds and net expenditure of £12,564 on restricted funds after transfers.

Reserves policy

The charity's free reserves, excluding fixed assets, at the year end were £46,487.

The Trustees of Ilkley & District Good Neighbours (IDGN) have agreed a Reserves Policy that requires the charity to hold reserves of 6 to 12 months of forecast expenditure. This statement explains why the Trustees feel that this is not only necessary but demonstrates good financial planning and that the charity is being responsibly managed.

Whilst the reserves at the year end are slightly below the target of 6 months of the next year's forecast expenditure, it is noted that the main project funds hold healthy balances and the fundraising committee continues to be active in seeking opportunities for additional sources of income.

The level of reserves held has been agreed for three principal reasons:

1. Staffing

IDGN is a growing charity which has expanded the number of services it provides locally and, as a direct result of this, the number of staff it employs. Having the level of reserves held allows IDGN to offer a degree of job security to its workforce. It means that staff can be employed on permanent contracts, as opposed to only being able to be offered either temporary or fixed-term contracts, allowing them to focus on delivering their roles without having to worry about being made redundant or their jobs coming to an end. The Trustees feel that having a stable staffing structure is critical to the medium to long term success of the Charity and gives them the ability to plan further ahead and more strategically.

2. Financial stability

IDGN is dependent on securing external funding in order to operate. As the country continues to recover from the pandemic, it is a very difficult economic climate in which the third sector operates, with competition for external funding greater than ever before. IDGN is fortunate to benefit from ongoing annual financial support from Bradford Metropolitan District Council (BMDC). This financial support underpins the delivery of the three principal programmes run by IDGN, Befriending, Shop Assist and Moving On. Holding reserves means that should the core financial support from BMDC cease, the Trustees have the necessary time to identify other sources of external funding, develop and submit bids to these funders and secure an alternative source of income without having to make any staff redundant or cut the number of key services it is able to deliver.

Ilkley and District Good Neighbours

Trustees' report (continued) for the year ended 31 March 2023

Reserves policy continued

3. Reacting to the needs of local people

The level of reserves held allows IDGN, through consultation and engagement with its users and the wider community, to identify new projects that are needed locally. To self-fund the design and development of these new projects. To launch them as a pilot project and to monitor and review the success of these new pilot projects. To gather feedback from the users of the pilot projects and make changes to improve them, before there is a requirement to seek external funding to launch them as a fully costed, developed, and researched project with a proven need. (This can be demonstrated by the approach taken to the Walk and Talk pilot).

Ilkley and District Good Neighbours

Trustees' report (continued) for the year ended 31 March 2023

Statement of trustees' responsibilities

The trustees (who are also the directors for the purposes of company law) are responsible for preparing the Trustees report and the financial statements in accordance with the applicable law and UK Accounting Standards.

Company law requires the trustees to prepare financial accounts 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 the year. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the accounts on a going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

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 accounts comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report has been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities (Charities SORP (FRS102)), and in accordance with the special provisions of the Companies Act 2006 relating to small companies.

approved by the board of trustees on 16/5/23

Ian Wilson (Trustee)

Ilkley and District Good Neighbours

Independent examiner's report to the trustees of Ilkley and District Good Neighbours

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2023, which are set out on pages 8 to 13.

Responsibilities and basis of report

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

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

Independent examiner's statement

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

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

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

Katy Sargeant ACA

16/5/23

West Yorkshire Community Accountancy Service CIO

Stringer House
34 Lupton Street
Leeds
LS10 2QW

Ilkley and District Good Neighbours
Statement of Financial Activities
(including summary income and expenditure account)
for the year ended 31 March 2023

	Notes	2023 Unrestricted funds £	2023 Restricted funds £	2023 Total funds £	2022 Total funds £
Income from:					
Grants and donations	(2)	4,760	47,765	52,525	51,800
Interest		1,361	-	1,361	2,192
Legacy		-	500	500	15,000
GADS receipts		-	-	-	235
Client shopping payment		-	20,302	20,302	24,314
Gift Aid		1,200	-	1,200	-
Other income		1,000	-	1,000	-
Total income		8,321	68,567	76,888	93,541
Expenditure on:					
Salaries NI and pensions	(3)	17,325	40,157	57,482	50,688
Payroll charges		199	623	822	908
Office services		2,060	4,804	6,864	5,490
Postage		106	169	275	45
Publishing and stationery		106	194	300	233
Goods and services		3,638	9,094	12,732	12,919
Insurance		551	-	551	535
Publications and subscriptions		55	110	165	163
Room hire		299	4,712	5,011	1,836
Bank charges		79	-	79	18
Advertising		-	-	-	15
Gifts		54	20	74	103
Security and data protection		134	-	134	279
Staff training		-	235	235	410
Transport hire		-	782	782	116
Volunteer expenses		-	1,354	1,354	851
Volunteer shopping reimbursements		-	18,568	18,568	25,220
Independent examination		792	-	792	450
Staff expenses		-	309	309	62
Total expenditure		25,398	81,131	106,529	100,341
Net income / (expenditure)		(17,077)	(12,564)	(29,641)	(6,800)
Fund balances brought forward		63,564	87,052	150,616	157,416
Fund balances carried forward	(4)	46,487	74,488	120,975	150,616

All incoming resources and resources expended derive from continuing activities.

Ilkley and District Good Neighbours
Balance sheet
as at 31 March 2023

		2023	2023	2023	2022
		Unrestricted	Restricted	Total	Total
		£	£	£	£
Current assets					
Debtors and prepayments	(5)	1,535	1,084	2,619	259
Cash at bank and in hand	(6)	48,021	73,960	121,981	150,807
Total current assets		<u>49,556</u>	<u>75,044</u>	<u>124,600</u>	<u>151,066</u>
Current liabilities:					
amounts falling due within one year					
Creditors and accruals	(7)	3,069	556	3,625	450
Total current liabilities		<u>3,069</u>	<u>556</u>	<u>3,625</u>	<u>450</u>
Net current assets / (liabilities)		<u>46,487</u>	<u>74,488</u>	<u>120,975</u>	<u>150,616</u>
Net assets		<u>46,487</u>	<u>74,488</u>	<u>120,975</u>	<u>150,616</u>
Funds					
Unrestricted funds		46,487	-	46,487	63,564
Restricted funds		-	74,488	74,488	87,052
Total funds		<u>46,487</u>	<u>74,488</u>	<u>120,975</u>	<u>150,616</u>

For the year ending 31 March 2023 the charitable company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the charitable company to obtain an audit of its accounts for the year in question in accordance with section 476. The trustees (who also the directors for the purposes of company law) acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime and with FRS 102 (effective January 2019).

The financial statements were approved by the board of trustees on 16/5/23

Ian Wilson (Trustee)

Ilkley and District Good Neighbours

Notes to the accounts

for the year ended 31 March 2023

1 Accounting policies

Basis of accounting

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note(s) to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by 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) and with the Charities Act 2011.

The charity constitutes a public benefit entity as defined by FRS 102.

There has been no change to the accounting policies since last year.

No changes have been made to the accounts for previous years.

Going concern

The trustees are satisfied that there are no material uncertainties about the charity's ability to continue.

Incoming resources

All incoming resources are included in the Statement of Financial Activities (SOFA) when the charity becomes entitled to the resources, it is more likely than not that the trustees will receive the resources and the monetary value can be measured with sufficient reliability.

Grants and donations

Grants and donations are only included in the SOFA when the charity has unconditional entitlement to the resources.

Where grants are related to performance and specific deliverables, they are accounted for as the charity earns the right to consideration by its performance.

Expenditure and liabilities

Expenditure is recognised on an accrual basis as a liability is incurred. Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out the resources and the amount of the obligation can be measured with reasonable certainty.

Taxation

As a charity the organisation benefits from rates relief and is generally exempt from income tax and capital gains tax but not from VAT. Irrecoverable VAT is included in the cost of those items to which it relates.

Pensions

The charity operates a defined contribution scheme for the benefit of its employees. The costs of contributions are recognised in the year they are payable.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of an appeal.

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

Ilkley and District Good Neighbours
Notes to the accounts continued
for the year ended 31 March 2023

2 Grants and donations	2023	2023	2023	2022
	Unrestricted	Restricted	Total	Total
	funds	funds	funds	funds
	£	£	£	£
All other grants and donations	4,260	3,429	7,689	6,914
Bradford Metropolitan District Council (Befriend)	-	10,499	10,499	10,000
BMDC (Shop Assist)	-	10,499	10,499	10,000
BMDC (Moving On)	-	8,398	8,398	8,000
Bradford District Community Foundation (BDCF)	-	10,000	10,000	10,000
Bradford VCS Alliance	-	-	-	3,000
Ilkley Round Table (IRT)	-	3,940	3,940	-
Local Giving	-	500	500	-
W W Spooner Trust	500	-	500	500
Walker Foster Solicitors	-	500	500	-
Community Action Bradford & District	-	-	-	50
Co-op	-	-	-	2,586
Ilkley Rotary Club	-	-	-	750
	<u>4,760</u>	<u>47,765</u>	<u>52,525</u>	<u>51,800</u>

3 Staff costs and numbers	2023	2022
	£	£
Gross salaries	52,870	49,214
Social security costs	2,407	1,830
Employment allowance	(2,407)	(1,830)
Pensions	<u>4,612</u>	<u>1,474</u>
	<u>57,482</u>	<u>50,688</u>

The average number of employees during the year was 4, being an average of 2 full time equivalent (2022: 4.5, 2.2 FTE). There were no employees with emoluments above £60,000.

Defined contribution pension scheme	2023	2022
	£	£
Costs of the scheme to the charity for the year	4,612	1,474
Amount of any contributions outstanding at the year end	2,250	-

4 Restricted funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
Befriending	25,602	10,535	13,702	-	22,435
Christmas Parcels	2,156	1,000	1,013	-	2,143
HAGA	3,018	173	2	-	3,189
Moving On	11,370	10,375	10,510	-	11,235
ON	3,844	-	1,705	-	2,139
Shop Assist	28,914	32,313	40,043	-	21,184
Social Events	598	4,171	4,122	-	647
Walk & Talk	2,344	-	198	-	2,146
Bradford Resilience	9,206	-	9,206	-	-
BDCF Give Bradford	-	10,000	630	-	9,370
	<u>87,052</u>	<u>68,567</u>	<u>81,131</u>	<u>-</u>	<u>74,488</u>

Ilkley and District Good Neighbours

Notes to the accounts continued

for the year ended 31 March 2023

4 Restricted funds continued

Fund name	Purpose of restriction
Befriending	To enhance the quality of life for those over 70 who are isolated
Christmas Parcels	Parcels delivered to around 100 local older or less able residents
HAGA	Home and Garden Assist - helping older and disabled people with gardening and small home maintenance jobs
Moving On	To help people make new friends and/or find new interests
ON	For the 'Over Nineties' party held each September
Shop Assist	Shop and drop - to help those with difficulty accessing shops. Volunteers do the shopping and drop it to the clients
Social Events	For organising various social events including trips and days out
Walk & Talk	Pilot project to assist with clients mobility, fitness and wellbeing
Bradford Resilience	To support the charity in issues around resilience and post COVID
BDCF Give Bradford	Strategic development including updating financial systems and new service delivery

5 Debtors and prepayments

	2023	2022
	£	£
Debtors	1,084	-
Prepayments	335	259
Accrued income	1,200	-
	<u>2,619</u>	<u>259</u>

6 Cash at bank

	2023	2022
	£	£
Cash at bank	121,981	150,807
	<u>121,981</u>	<u>150,807</u>

7 Creditors and accruals

	2023	2022
	£	£
Creditors	236	-
Accruals	1,139	450
Other creditors	2,250	-
	<u>3,625</u>	<u>450</u>

8 Related party transactions

Trustee expenses

No trustee received any expenses during this year or the previous year.

Trustee remuneration and benefits

No trustee received any remuneration or benefit during this or the previous year.

Remuneration and benefits received by key management personnel

The total employee benefits received by key management personnel were £0 (previous year: £0).

Ilkley and District Good Neighbours
Statement of Financial Activities including comparatives for all funds
(including summary income and expenditure account)
for the year ended 31 March 2023

	2023 Unrestricted funds £	2022 Unrestricted funds £	2023 Restricted funds £	2022 Restricted funds £	2023 Total funds £	2022 Total funds £
Income						
Grants and donations	4,760	5,735	47,765	46,065	52,525	51,800
Interest	1,361	2,192	-	-	1,361	2,192
Legacy	-	-	500	15,000	500	15,000
GADS receipts	-	235	-	-	-	235
Client shopping payment	-	-	20,302	24,314	20,302	24,314
Gift Aid	1,200	-	-	-	1,200	-
Other income	1,000	-	-	-	1,000	-
Total income	8,321	8,162	68,567	85,379	76,888	93,541
Expenditure						
Salaries NI and pensions	17,325	15,573	40,157	35,115	57,482	50,688
Payroll charges	199	206	623	702	822	908
Office services	2,060	1,207	4,804	4,283	6,864	5,490
Postage	106	12	169	33	275	45
Publishing and stationery	106	45	194	188	300	233
Goods and services	3,638	2,012	9,094	10,907	12,732	12,919
Insurance	551	535	-	-	551	535
Publications and subscriptions	55	53	110	110	165	163
Room hire	299	107	4,712	1,729	5,011	1,836
Bank charges	79	18	-	-	79	18
Advertising	-	-	-	15	-	15
Gifts	54	35	20	68	74	103
Security and data protection	134	41	-	238	134	279
Staff training	-	145	235	265	235	410
Transport hire	-	-	782	116	782	116
Volunteer expenses	-	-	1,354	851	1,354	851
Volunteer shopping reimbursements	-	-	18,568	25,220	18,568	25,220
Independent examination	792	450	-	-	792	450
Staff expenses	-	-	309	62	309	62
Total expenditure	25,398	20,439	81,131	79,902	106,529	100,341
Net gains/(losses) on investments	-	-	-	-	-	-
Net income / (expenditure)	(17,077)	(12,277)	(12,564)	5,477	(29,641)	(6,800)
Transfers between funds	-	(3,500)	-	3,500	-	-
Net movement in funds	(17,077)	(15,777)	(12,564)	8,977	(29,641)	(6,800)
Fund balances brought forward	63,564	79,341	87,052	78,075	150,616	157,416
Fund balances carried forward	46,487	63,564	74,488	87,052	120,975	150,616