

ILKLEY AND DISTRICT GOOD NEIGHBOURS

ANNUAL REPORT 2024 – 2025



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1. Introduction

The Management Committee present their Report and Accounts for the financial year 1 April 2024 to 31 March 2025.

Objectives and Activities

Our continuing aim is to support independent living and improve the lives of older and vulnerable people in Ilkley and the surrounding area.

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 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 Ilkley and District Good Neighbours office to ensure compliance with the health and safety of staff, volunteers and individuals from member groups.

2. Trustees and Staff 2024/2025

Ed Duguid	Chair & Acting Hon Secretary
Penny Coulthard	Vice Chair
Jim Manson	Vice Chair
Ian Wilson	Hon Treasurer
John Bray	
Anita Dunford	
George Palacious	(Elected July 2024)
Bernard Conlon	(Elected July 2024 & Resigned March 2025)
Sheila Mahon	(Elected July 2024)
David Humphries	(Co-opted)
Kathryn Shuttleworth	(Co-opted)

Councillor Stephen Butler 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

DEMENTIA HUB CO-ORDINATOR

Jenny Thornton

3. The Chair's Report

It's great to be introducing our Annual Report after another year of achievement by the charity, where we have also successfully introduced a new service for those in our community affected by Dementia.

Below you will find a summary of what we have been doing in our 50th Anniversary year and lots of photos of clients, enjoying the fruits of our services. We are again grateful to all those who have supported us during this year and, apart from the amazing people of Ilkley and surrounding area who support us on a regular basis we list our specific thanks to those organisations who have funded us, without whom we would not be able to continue the good work.

At the last AGM three new trustees were elected, Bernard Conlon, Sheila Mahon and George Palacios. Sadly, Bernard was unable to continue for personal reasons, although we hope we may be able to welcome him back again at some point in the future. Latterly, we have also co-opted two additional Committee members in David Humphries and Kathryn Shuttleworth, as we seek to broaden the skills on the Committee, adding additional business and health related skills. We welcome all our new committee members who we know will add to the strength of the organisation.

It would again be remiss of me not to mention and thank the three important constituents in the delivery of our services. Firstly to our staff who run the operations on a day-to-day basis and who continue to strive to improve the quality of what we deliver and go above and beyond to achieve this.. Secondly, to our trustees, who diligently and with equal dedication oversee those operations and, along with the staff, ensure that we can continue to support our community and will continue to do so in the future. Finally, and certainly not the least, a massive thanks to the over 100 volunteers who week in and week out deliver the service to our clients, and without whom we would not be able to do it.

We hope you enjoy reviewing our work in the past year also that you will continue to support us into the future in alleviating the isolation and loneliness of one of the most vulnerable sections of our community.

Ed Duguid – Chair

4. Manager's Report

This year the staff team has continued to go from strength to strength and once again there have been many highlights throughout the year. We have been able to build even stronger working relationships and expanded the team while building strength to the Charity, Trustees and Volunteers. 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. Through implementing robust procedures, policies and guidance from the very beginning, we have received amazing feedback from our wonderful volunteers which in turn leads to a stronger retention of volunteers.

Volunteer Training

As part of our ongoing volunteer training and development, we have run 5 training opportunities as well as delivering the mandatory safeguarding training sessions every 6 months. Optional training opportunities have included Basic First Aid delivered by the Red Cross, a Bereavement Workshop delivered by Full Circle Funerals, 2 sessions on raising awareness of dementia, and a Slips, Trips & Falls Prevention session.

In a new development, we are currently working with volunteers to develop a bi-annual Peer Support Group. Facilitated by staff, this group will be a safe and supportive environment for volunteers to discuss some of the challenges they face in their roles with a focus on sharing experiences, emotional support, learning and practical solutions. This has been strongly led by Helen our Befriending Co-ordinator.



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

In addition to the Team above, we have welcomed new recruit, Jenny Thornton who is our Dementia Advisor for our Dementia Hub.

Following our successful 6-month pilot of the Dementia Hub, this scheme is now well integrated into the body of the organisation and goes from strength to strength. Jenny has implemented some solid groundwork and roots to the scheme and has had an unbelievable success in the first 12 months. Sadly, Jenny has decided to step down after this financial year due to personal issues and we wish her all the happiness for her future. We look forward to working with her replacements and updating you on their success throughout the year.

Personally, I have continued to establish my position and develop and grow Ilkley and District Good Neighbours 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 VSCE in the area.

Last year we hosted our annual over 90s party once again. We were honoured to have the attendance of Suzanne Watson, Deputy Lord Lieutenant, Robbie Moore MP, Isabel Ashman, Ilkley Town Crier and Damian Kearns, Ilkley Town Mayor.



We had wonderful entertainment from Moor Notes Choir, The Air Cadets Band and Judith Idle, Pianist. 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, including the Air Cadets. 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 backbone of the organisation without whom we would be unable to deliver the schemes. We once again enjoyed a Christmas party at The Manor House including mulled wine and mince pies. We thank them all from the bottom of our hearts.

I'd like to thank all Trustees for their support during the year, in guiding the organisation and myself and I look forward to seeing all the strategic work put into place.

Overall, it has been another fantastic 12 months with Ilkley and District Good Neighbours going from strength to strength.

Lucy Steer - Manager

5. Befriending

Research repeatedly shows that to have the best chance of living happy, contented lives we need social connections and quality relationships. This is what befriending brings to older or vulnerable local people who are experiencing feelings of loneliness and/or social isolation. Each volunteer is matched with an older person for regular visits to enhance their lives through companionship and, given time, in friendship outside the boundaries of our befriending scheme. The figures below show the numbers involved in the scheme over the last financial year.

Over the last year, 31 volunteers have supported:

- ✓ 36 lonely older people
- ✓ with 702 face to face visits (a 14% decrease on last year) with 813 volunteering hours
- ✓ and 199 phone calls, totalling 662 hours (an increase of 201% on last year)



Moving to a friendship

After introducing a 2-year time-limited approach to befriending last year, we have been very successful in retaining those experienced volunteers who have now moved to a 'friendship' with their client. Some who decided to remain friends with their client have gone on to request a new client match. We have therefore retained experienced volunteers at a time when, nationally, the volunteer market is reducing. We consider ourselves very fortunate to have retained such excellent volunteers who are dedicated to addressing loneliness amongst older people. Those that have moved to a friendship have now been able to enjoy greater benefits now they are free of the boundaries of our befriending scheme, such as spending time with the volunteer's children, whom they have often heard lots about but have been unable to meet or being invited to the volunteer's home for tea.

Feedback

'Thanks for listening, being there, and reinforcing that I have a choice.' Befriending Volunteer

'The care and thought taken to match Mum with her befriender was ideal, matching her up with someone with exactly the same background, interests and past career. Their friendship has definitely added to her quality of life' Family Member (befriending)

'I am closer to my befriender than some of my family' Befriending Client



Our volunteers

Of course, the impact the scheme makes on clients' lives would not be possible without our fabulous volunteers. They are dedicated, reliable, empathetic and continue to have their clients best interests at heart. As one of our clients said recently 'Good Neighbours volunteers are a wonder and improve my quality of life in so many ways each week. I could not be more thankful'.

Helen Hawney - Befriending Coordinator

6. ShopAssist

The year in numbers

Over the full financial year, we have provided regular shopping support to 26 clients with Shop and Drop and 18 clients with ShopAssist. Over the same time period, we have been supported by 34 volunteers.

On average, each month, we delivered 73 shops and accompanied clients on 33 shops. This equates to a total of 1489 shops in 2024-5.

As we begin 2025-26, the ShopAssist scheme is:

- supporting 38 clients,
 - taking 18 clients to the shops
 - delivering shopping to 26 clients
- managing 30 regular volunteers and a cohort of 8 ad hoc volunteers.



A client's story



Rose was referred to the ShopAssist scheme by Home from Hospital following discharge from hospital after a fall. Rose had been shopping independently right up to when she was taken to hospital and was very keen to, one day, get back to the supermarket.

When Rose was assessed for our scheme her mobility had been so badly affected that she couldn't begin to think about going to the supermarket herself. We started supporting her immediately as it was clear she needed our help to access fresh groceries. Two of our ad hoc volunteers stepped in and covered the first few shops whilst a regular volunteer was recruited.

This new volunteer, Fiona, began by providing Shop & Drop: phoning for a list, shopping and paying and then delivering to Rose. This happened for nine weeks and each time Fiona stopped for a coffee and a chat. Over the weeks the pair got to know and trust each other and Rose grew stronger.

Two months later, Rose decided to try returning to the supermarket supported by Fiona; this is our ShopAssist scheme. It took a few trips for Rose to build up her stamina and to start with she would begin the shop and then sit in the café and wait for Fiona to complete it.

Rose and Fiona have been successfully shopping together ever since and Rose is now able to make her way around the whole store and check out. A trip to the café is, however, definitely still part of the outing!

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 continued to develop what we offer them. This year's project has been the Volunteer Portal on the Ilkley and District Good Neighbours website. Behind a password shared with all Ilkley and District Good Neighbours volunteers, the portal is a single point of access for all information relevant to volunteers. This includes: policies, guidance, forms, training resources, newsletters and the handbook, as well as contact details for each of the team members.



Feedback

The ShopAssist service is a lifeline for our clients, as demonstrated by the feedback received in the last year. We have also been very proud to have received positive feedback from our volunteers as well.

"I want to thank [mother's shopper] personally for being such a critical link in mother's supply chain. Living as I do in Sydney, it was a huge relief to hear when I called on a Friday that H had just been or was expected. Congratulations and thanks on all that your organisation achieves." Client's son, Sep 23

"Terrific, marvellous, first class, fabulous. I had fun!" "It may not seem much but having someone packing my shopping at the supermarket was a massive thing for me" Feedback from client after first ShopAssist, Oct23

"I just wanted to let you know how wonderful V has been with my Dad and does so much more than just delivering his shopping, as she stays for a chat too." Client daughter, Feb 24

"Thank you for your phone call on Monday, and for your continued support. I always feel that there is a team in the background ready and willing to help." Volunteer feedback to SA coordinator, July 23

Charlotte Atkinson - ShopAssist Coordinator

7. Moving On Friendship Group Report

The Moving On Friendship Groups are Ilkley Good Neighbours' weekly social and signposting get-togethers. We run on a Thursday and Friday afternoon at the Clarke Foley Community Hub.

The Friday group has been running for many years now and it still has members who were there on the very first day. Lots more people have joined since then and it is a very popular group with many strong friendships blossoming between people who met through us.

Following the success of our original group, we started a second group in October 2023 on a pilot basis twice a month. This has now been extended to a weekly meeting on a Thursday afternoon. This group is open to all people aged over 60 who are looking for a warm and welcoming environment to connect with other people. It currently meets at 1.30pm on a Thursday afternoon in the Small Hall of the Clarke Foley Community Hub and people are welcome to turn up on the day. Feel free to spread the word!

We are delighted to have brought in some new volunteers to help at our new group and make attendees feel at ease. We have had some lovely feedback with members saying the new group is "so friendly and welcoming" and another saying it has "changed my life for the better."



One of our new members and volunteers as they walk to the Thursday Moving On Friendship Group

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. Something which is particularly beneficial for members who are not confident on technology or the internet. I share knowledge of events/activities/information each week by way of

announcements and presentations to the group. We also have a bank of information and documents available to physically browse at the groups. This covers material about what is going on locally (e.g., activities and entertainment), as well as useful information to facilitate independent living, good mental health and wellbeing.

The groups are a great place to ask questions (e.g., how do I travel now I am alone and less active than my friend group) and share knowledge (e.g., information about benefits and changes to energy prices). On occasion, it is clear that people are concerned about the same themes, so I have run presentations based on queries that are raised. These included an overview on the changes to phone lines, group chat on sleep issues, tips on how to get attendance allowance etc. Sometimes just knowing people are experiencing the same issues and challenges as you can be a real boost.

We regularly get interesting and helpful speakers 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. I choose our speakers based on feedback from members.



Two of our super volunteers prepping for our
Coronation Party

In respect of the speakers from a more educational and informative point of view, we have heard talks on various topics, including: support and advice on hearing issues, ways of keeping active locally, advice on ageing well from a local physiotherapist and a talk focusing on the current scams seen locally by the Ilkley Police service. The Red Cross have talked to us about adapting and recovering from adversity and we have run our falls prevention session again. We also get official representatives for the area in for people to have face-to-face conversations about local issues that concern them.

As well as inviting “useful” speakers to the group, we also get people in with interesting backgrounds and experience. These have included talks by local authors, an Ilkley chocolatier talking about the process of making artisan chocolate, an insight into the art of marquetry, the Burley-Téréli Friendship Trust, Friends of Ilkley Riverside Parks, “Behind the Footlights” of Ilkley Amateur Operatic Society and travelling alone after

bereavement.

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 and people have given their time and expertise for free. It is very much appreciated.

Finally, the Moving On Friendship Groups would not be possible without the assistance of our wonderful volunteers, both old and new, who support and help regularly. Their help this year, as always, has been invaluable both to Ilkley and District Good Neighbours and the members they support.

Hannah Walton - Moving On Friendship Group Coordinator

8. Dementia Hub and Café

The Dementia café has continued to deliver 2 sessions per month on 1st and 3rd Tuesday afternoons with a range of activities including musical entertainment and cognitive stimulation therapy sessions. The demand for the café has grown over time and now has a waiting list. We have just launched a second offer at Addingham Cricket Club providing a quieter environment for people who find the Ilkley café a little too busy. The total of attendees from July -24 to May 25 at the Ilkley Well-being Café is 458, with 8 people trialling our new café in Addingham.

Total contacts 466



Dementia Hub Drop-in sessions provide a weekly face to face service for people to make enquiries, seek information, advice and support on any matters related to Dementia. The drop-in was held in Ilkley Library from May 24 until March 25 when the library closed for refurbishment. The service transferred on a temporary basis to the Clarke Foley Centre for 6 weeks but has not been able to return to the library due

to delays in the refurbishment project. People have however continued to make contact by telephone.

Total contacts 146 (the number of individuals is much higher as people often visit in pairs)

9. Social Events

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

Afternoon Tea Events Summer 2024

Due to increased client numbers across the projects, we have held three separate Scenic Drives followed by Afternoon Tea at Cavendish Pavilion during 2024, enabling ninety clients to attend with our band of supportive volunteers and staff members to assist. During all three events, we were blessed with lovely weather, which enabled us to fully take in the splendour of the Yorkshire Dales. The sandwiches, cakes, and teas/coffee were all delicious, and the Cavendish team looked after us very well.



Charlie and the Chocolate Factory July 2024

Twenty members of the Moving-On Friendship Group had the pleasure of attending the Summer performance of Charlie and the Chocolate Factory, presented by the talented Ilkley Upstagers. The sets, music, and performances



afternoon.



were all spectacular, and everyone was unanimous in their praise of the enjoyable

Marks and Spencer's Christmas Shopping Trip November

Our first-ever Christmas shopping trip to Marks & Spencer was a delightful experience for the thirty clients who attended. It was a perfect opportunity for everyone to browse the festive displays leisurely, select Christmas gifts for their loved ones, and enjoy the seasonal ambience. The group appreciated the chance to take their time, shop at their own pace, and have lunch with each other.



December 2024 – Christmas Lunches

In December, with an increased client base, we hosted three separate Christmas lunch events at the Audley Clevedon Restaurant, enabling ninety clients and volunteers to have a festive Christmas lunch. The delicious food, warm hospitality, and lively conversations made for a delightful experience. Everyone who attended expressed their appreciation for the chance to enjoy a festive meal in such a welcoming and festive setting.

January 2025 – Marks & Spencer's Archive Museum

To start the new year, we organised a trip to the Marks & Spencer Archive Museum in Leeds. This fascinating visit provided an insight into the history of one of Britain's most famous retailers. Our group enjoyed exploring the exhibits, which showcased the evolution of M&S from its humble beginnings to the present day. The trip sparked many memories and conversations, making it both an educational and nostalgic experience.

(Janet, one of our lovely volunteers, is getting into the swing of the past and dressing up as Demi Roussos.



Ilkley Upstagers Production of Dick Whittington

Another highlight of January was the Ilkley Upstagers lively production of Dick Whittington. The performance was full of energy, humour, and outstanding talent, providing an afternoon of great entertainment for all who attended. The classic pantomime brought plenty of laughter, and it was a joy to see the community come together to support our talented young people.

Thanks

The success of our trips wouldn't have been possible without the dedicated support of our wonderful volunteers, Mick, Alice, Jo, Margaret, Pam, Yvonne, Janet, Kulwant, and Cath, and the volunteers of Ilkley Community Transport. Their efforts, from driving to planning the route and sharing local information, have been invaluable.

Anita Dunford - Trustee

10. Christmas Gifts Project

A total of 121 Christmas parcels were delivered to clients this year, with generous support from local organisations. Deliveries were once again carried out by students from Ilkley Grammar School, volunteers from Ilkley and District Good Neighbours, and members of the Ilkley Wharfedale Rotary Club.



This year we expanded our intergenerational work with this project. The students spent more time with individual clients where we delivered to their homes, whilst students also visited our Friendship Group on two days where they spent time chatting to attendees and then helping distribute the gifts and cakes. This is an aspect we hope to build on for future events, as it was enjoyed greatly by both our clients and the students.



We would particularly like to thank the Ilkley Roundtable who funded the project .

Ed Duguid - Chair

11. Home and General Assist (HAGA) Report

Demand has been low this year and until recently the majority of requests have been for small internal jobs.

Since removing Garden Assist from the title we have seen a reduced number of requests. The scheme is not highly publicised, so we generally service just our clients.

We thank all the volunteers who have contributed to this scheme during 2024-25.

John Bray - Trustee

12. Appendix 1 - Annual Accounts

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 2025



Ilkley and District Good Neighbours

Annual Report and Financial Statements for the year ended 31 March 2025

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Prepared by West Yorkshire Community Accountancy Service CIO

Ilkley and District Good Neighbours

Trustees' report for the year ended 31 March 2025

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	
Ian Wilson	Treasurer	
Pamela Brunger	Secretary	Resigned 10 July 2024
Judith Hutton		Resigned 10 July 2024
Elizabeth Binns		Resigned 10 July 2024
John Bray		
Anita Dunford		
George Palacios		Appointed 10 July 2024
Sheila Mahon		Appointed 10 July 2024
Bernard Conlon		Appointed 10 July 2024, resigned 13 April 2025
David Humphries		Co-opted 6 November 2024
Kathryn Shuttleworth		Co-opted 6 November 2024
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
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 2025

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.

Achievements and performance

Ilkley and District Good Neighbours has continued to deliver and expand a variety of services designed to relieve isolation, promote wellbeing, maintain independence and strengthen community mental health across the district.

The Shop and Drop service remains vital for clients unable or lacking confidence to shop independently. Over the year, we supported 44 clients in total - 26 through Shop and Drop and 18 through Shop Assist, facilitating a total of 1,489 shopping trips were carried out by the 34 regular and cover volunteers. Notably, some existing

Our Moving On Friendship Group has gone from strength to strength. Weekly meetings continue to be in high demand, regularly reaching capacity, with an average of 27 attendees per session. Responding to this demand, we piloted a second weekly group, which has now become a permanent fixture thanks to the success of the pilot and partial funding already secured. Between both groups, 70 people accessed the service this year with 82 meetings being held in total.

The Befriending Service supported 36 clients over the year, delivered by 31 volunteers who completed 702 face to face visits and 199 phone calls, totalling 901 interactions and 805 volunteering hours. This project is time limited to 2 years, after which the match is usually moved to a friendship. This means that 5 volunteer/client matches that have lasted over 2 years have been released from the befriending project over the last year, and all continue to meet as friends. 4 out of the 5 volunteers who have moved to a friendship have also asked to take on a new client.

Following a successful pilot and informed by earlier research, our Dementia Hub and Café has now become an ongoing core service. It continues to grow in popularity, offering essential advice, support, and companionship to those living with memory issues and their carers. To support this growth, two new staff members have recently joined the team, ensuring we can meet rising demand and expand the service's reach and impact.

The Social Events programme this year included minibus scenic drives with afternoon teas, the Christmas lunches at Audley Clevedon, and a trip to an Upstagers' pantomime performance. The events were warmly received and well attended.

Our annual Over Nineties Party returned with resounding success, attracting over 90 guests. Held at the Clarke Foley Centre, the celebration included food, music, and entertainment. Distinguished guests included the Deputy Lieutenant, Robbie Moore MP, Ilkley Town Mayor, Ilkley Town Crier, and members of the Air Cadets, creating a truly special event for all involved.

A total of 121 Christmas parcels were delivered to clients this year, with generous support from local organisations. Deliveries were once again carried out by students from Ilkley Grammar School, volunteers from IDGN, and members of the Ilkley Wharfedale Rotary Club.

Ilkley and District Good Neighbours

Trustees' report (continued) for the year ended 31 March 2025

Achievements and performance continued

Our Home and Gardens service (HAGA) has been rebranded as Home and General Assist, reflecting the scope of support we provide. Volunteers continue to assist with simple DIY tasks and general maintenance, helping clients maintain their homes and independence.

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

- BRADFORD MDC
- Garfield Weston
- Ilkley Round Table
- Rotary Club of Ilkley Wharfedale
- Vitello Lounge
- The VCS Alliance
- The Charles and Elsie Sykes Trust
- Olicana Masons
- Barratt and David Wilson
- Midwood McTurk Trust
- Ilkley Town Council
- Co-op
- Skipton Building Society Ilkley
- RW Morten, Ilkley
- Booths Supermarket, Ilkley
- Tesco, Ilkley Store
- McCarthy and Stone
- Graham and Diane Smith Charitable Trust
- Bradford City of Culture 25
- Many generous personal donations from clients and supporters

We extend our sincere thanks to our dedicated staff, whose professionalism and hard work underpin every service we provide. Above all, we are deeply grateful to our wonderful volunteers, without whom none of our work would be possible.

Financial review

The net income for the year was £79,361, including net income of £84,479 on unrestricted funds and net expenditure of £5,118 on restricted funds.

Reserves policy

The charity's free reserves, excluding fixed assets, at the year end were £150,411. This includes £39,000 of designated funds (explained below).

The Trustees have agreed the following Reserves Policy:

Reserves of 6 to 12 months of forecast expenditure.

The policy shall be reviewed at least annually. The level of reserves shall be included in the financial reporting provided to Trustees in advance of each Trustee meeting.

For the Financial Year Ending 31 March 2026, the trustees have agreed to designate funds for expenditure as follows:

Shop Assist £19,500
Befriending £14,500
Moving On Second Group £ 5,000
Total £39,000

These funds have been designated to allow us to continue for the next 12 months with the core activities, which were previously funded by BMDC, whilst new external funding sources are sought.

Ilkley and District Good Neighbours

Trustees' report (continued) for the year ended 31 March 2025

Reserves policy continued

The reserves held as at 31 March 2025 equate to 13.6 months of 2025/26 forecast expenditure. However, if the designated funds are deducted, the remaining reserves equate to 10 months of forecast expenditure.

The following statement explains why the Trustees feel that this level of reserves is not only necessary but demonstrates good financial planning and that the charity is being responsibly managed:

1. Staffing

IDGN is a growing charity which has expanded the services it provides and so the number of staff it employs. The level of reserves held allows IDGN to offer a degree of job security to its workforce. It means that, where possible, staff can have permanent contracts, rather than temporary or fixed-term, allowing them to focus on their roles without the worry of 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 currently fortunate to benefit from annual financial support from Bradford Metropolitan District Council (BMDC). This financial support underpins the three principal programmes: Befriending, Shop Assist and Moving On. Holding reserves means that should the support from BMDC cease, the Trustees have time to identify and try to secure other sources of external funding to avoid cutting the key services it delivers.

3. Reacting to the needs of the community

A sufficient level of reserves enables IDGN to identify, develop and launch pilot projects for local needs. It is able to test the approach, make any necessary improvements before deployment, fully cost and demonstrate the need, which is more likely to attract external funding. This is demonstrated by the approach taken with the second Moving On Friendship Group.

Ilkley and District Good Neighbours

Trustees' report (continued) for the year ended 31 March 2025

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 21/5/2025

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 2025, which are set out on pages 8 to 15.

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

27/5/2025

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 2025

	Notes	2025 Unrestricted funds £	2025 Restricted funds £	2025 Total funds £	2024 Total funds £
Income from:					
Grants and donations	(2)	81,114	87,490	168,604	72,746
Interest		4,645	-	4,645	2,559
Legacy		-	-	-	5,000
Client shopping payment		23,088	-	23,088	16,807
Gift Aid		2,780	150	2,930	717
Other income		12,760	-	12,760	6,161
Total income		124,387	87,640	212,027	103,990
Expenditure on:					
Salaries NI and pensions	(3)	6,887	64,260	71,147	61,477
Payroll charges		139	751	890	824
Office costs		3,135	4,814	7,949	6,927
Postage		20	20	40	934
Publishing and stationery		1,374	1,539	2,913	745
Insurance		-	735	735	663
Publications and subscriptions		216	75	291	353
Room hire		320	6,939	7,259	4,884
Bank charges		593	33	626	75
Security and data protection		174	-	174	340
Staff training		-	-	-	160
Transport hire		-	769	769	814
Volunteer expenses		469	833	1,302	1,812
Volunteer shopping reimbursements		23,106	-	23,106	16,758
Independent examination		300	888	1,188	1,050
Staff expenses		194	247	441	196
IT costs		1,327	3,688	5,015	6,074
Event costs		1,454	7,167	8,621	6,923
Legal and professional costs		200	-	200	2,160
Total expenditure		39,908	92,758	132,666	113,169
Net income / (expenditure)		84,479	(5,118)	79,361	(9,179)
Fund balances brought forward		65,932	45,864	111,796	120,975
Fund balances carried forward	(4)	150,411	40,746	191,157	111,796

All incoming resources and resources expended derive from continuing activities.

Ilkley and District Good Neighbours

Balance sheet

as at 31 March 2025

		2025	2025	2025	2024
		Unrestricted	Restricted	Total	Total
		£	£	£	£
Current assets					
Debtors and prepayments	(5)	3,733	-	3,733	3,789
Current asset investments	(6)	92,831	-	92,831	50,726
Cash at bank and in hand	(7)	55,164	42,762	97,926	59,657
Total current assets		151,728	42,762	194,490	114,172
Current liabilities:					
amounts falling due within one year					
Creditors and accruals	(8)	1,317	2,016	3,333	2,376
Total current liabilities		1,317	2,016	3,333	2,376
Net current assets / (liabilities)		150,411	40,746	191,157	111,796
Net assets		150,411	40,746	191,157	111,796
Funds					
Unrestricted funds					
General unrestricted funds		111,411	-	111,411	65,932
Designated funds	(9)	39,000	-	39,000	-
Unrestricted funds		150,411	-	150,411	65,932
Restricted funds		-	40,746	40,746	45,864
Total funds		150,411	40,746	191,157	111,796

For the year ending 31 March 2025 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 are 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 21/5/2025

Ian Wilson (Trustee)

Ilkley and District Good Neighbours

Notes to the accounts

for the year ended 31 March 2025

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, if 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.

Designated funds are unrestricted funds earmarked by the trustees for particular purposes.

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

Ilkley and District Good Neighbours
Notes to the accounts continued
for the year ended 31 March 2025

2 Grants and donations	2025	2025	2025	2024
	Unrestricted	Restricted	Total	Total
	funds	funds	funds	funds
	£	£	£	£
Bradford Metropolitan District Council (BMDC)	-	35,918	35,918	33,304
Garfield Weston Foundation	-	10,000	10,000	-
Ilkley Round Table (IRT)	-	4,749	4,749	2,930
Ilkley Town Council (ITC)	-	7,000	7,000	3,000
Tesco Groundwork	-	1,125	1,125	-
The Charles and Elsie Sykes Trust	-	2,000	2,000	-
The Co-op	-	1,612	1,612	1,038
The VCS Alliance (VCSA)	-	8,000	8,000	7,950
Charles Hayward Foundation	-	-	-	5,000
Hartleys and Hillards (H&H)	-	-	-	1,000
The Rotary Club of Ilkley Wharfedale	-	-	-	750
Other donations	81,114	17,086	98,200	17,774
	<u>81,114</u>	<u>87,490</u>	<u>168,604</u>	<u>72,746</u>

3 Staff costs and numbers	2025	2024
	£	£
Gross salaries	67,715	58,306
Social security costs	3,175	2,830
Employment allowance	(3,175)	(2,830)
Pensions	3,432	3,171
	<u>71,147</u>	<u>61,477</u>

The average number of employees during the year was 4.9, being an average of 2.3 full time equivalent (2024: 4.5, 2.2 FTE). There were no employees with emoluments above £60,000.

Defined contribution pension scheme	2025	2024
	£	£
Costs of the scheme to the charity for the year	3,432	3,171

Ilkley and District Good Neighbours
Notes to the accounts continued
for the year ended 31 March 2025

4 Restricted funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
Befriending	11,826	2,500	7,437	-	6,889
Befriending (BMDC)	-	11,862	11,862	-	-
Christmas Parcels	696	-	-	-	696
Ilkley Round Table	-	1,500	1,044	-	456
Neighbourly	500	-	500	-	-
Dementia Hub	-	673	-	-	673
Barratt & D Wilson C'mmty Fund	-	1,500	-	-	1,500
Dementia Hub (DFIA)	-	5,265	246	-	5,019
Dementia Hub (ITC)	3,000	7,000	10,000	-	-
Dementia Hub (Tesco)	-	2,663	-	-	2,663
Dementia Hub (VCS ABCD)	3,950	3,000	5,804	-	1,146
Dementia Hub (VCS)	-	5,000	-	-	5,000
Dementia Hub (WBC)	-	1,060	-	-	1,060
Exhibition	-	850	-	-	850
Exhibition (BMDC)	-	500	-	-	500
Garfield Weston Foundation	-	10,000	10,000	-	-
Home and Garden Assist (HAGA)	2,747	-	-	-	2,747
Moving On	7,471	-	3,062	-	4,409
Moving On (BMDC)	-	11,694	11,672	-	22
The Charles & Elsie Sykes Trust	-	2,000	2,000	-	-
Moving ON (Charles Hayward)	5,000	-	5,000	-	-
Tesco	-	1,125	505	-	620
Over Nineties	313	-	150	-	163
Over Nineties (VCSA)	2,140	-	2,140	-	-
Shop Assist	3,827	2,500	4,059	-	2,268
Shop Assist (BMDC)	-	11,862	11,862	-	-
Social Events	8	225	168	-	65
Social Events (Addingham Beer)	100	-	-	-	100
Social Events (Coop)	1,038	1,612	-	-	2,650
Social Events (H&H)	1,000	-	-	-	1,000
Social Events (VCSA)	1,860	-	1,721	-	139
Social Events (IRT)	388	3,249	3,526	-	111
	45,864	87,640	92,758	-	40,746

Fund name	Purpose of restriction
Befriending	To enhance the quality of life for those over 70 who are isolated.
Befriending (BMDC)	As above.
Christmas Parcels	Parcels delivered to around 100 local older or less able residents.
Ilkley Round Table	Christmas lunches and parcels
Neighbourly	Towards parcels delivered to around 100 local older or less able residents.
Dementia Hub	For a pilot hub to support the local community, those living with dementia and their carers.
Barratt & D Wilson C'mmty Fund	As above.
Dementia Hub (DFIA)	As above.
Dementia Hub (ITC)	As above.
Dementia Hub (Tesco)	As above.

fund purposes continued overleaf

Ilkley and District Good Neighbours

Notes to the accounts continued

for the year ended 31 March 2025

4 Restricted funds continued

Dementia Hub (VCS ABCD)	For a pilot hub to support the local community, those living with dementia and their carers.
Dementia Hub (VCS)	As above.
Dementia Hub (WBC)	As above.
Exhibition	Towards an exhibition.
Exhibition (BMDC)	Towards an exhibition.
Garfield Weston Foundation	Core Funding.
Home and Garden Assist (HAGA)	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.
Moving On (BMDC)	As above.
The Charles & Elsie Sykes Trust	Additional weekly Moving on friendship group.
Moving ON (Charles Hayward)	To help people make new friends and/or find new interests.
Tesco	Additional weekly Moving on friendship group.
Over Nineties	For the 'Over Nineties' party held each September.
Over Nineties (VCSA)	As above.
Shop Assist	Shop and drop - to help those with difficulty accessing shops. Volunteers do the shopping and drop it to the clients.
Shop Assist (BMDC)	As above.
Social Events	For organising various social events including trips and days out.
Social Events (Addingham Beer)	As above.
Social Events (Coop)	As above.
Social Events (H&H)	As above.
Social Events (VCSA)	As above.
Social Events (IRT)	As above.

5 Debtors and prepayments

	2025	2024
	£	£
Debtors	783	1,728
Prepayments	1,342	1,436
Accrued income	1,608	625
	<u>3,733</u>	<u>3,789</u>

6 Current asset investments

	2025	2024
	£	£
Cash equivalents on deposit	92,831	50,726
	<u>92,831</u>	<u>50,726</u>

7 Cash at bank and in hand

	2025	2024
	£	£
Cash at bank	97,528	59,627
Cash in hand	398	30
	<u>97,926</u>	<u>59,657</u>

Ilkley and District Good Neighbours
Notes to the accounts continued
for the year ended 31 March 2025

8 Creditors and accruals	2025	2024
	£	£
Bank loans and overdrafts	27	-
Creditors	2,118	1,326
Accruals	1,188	1,050
	<u>3,333</u>	<u>2,376</u>

9 Designated funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
Befriending	-	-	-	14,500	14,500
Moving On Second Group	-	-	-	5,000	5,000
Shop Assist	-	-	-	19,500	19,500
	<u>-</u>	<u>-</u>	<u>-</u>	<u>39,000</u>	<u>39,000</u>

Fund name

Befriending
Moving On Second Group
Shop Assist

Reason for designation

Funds set aside to allow us to continue for the next 12 months with our core activities, which were previously funded by BMDC, whilst new external funding sources are sought.

10 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.

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 2025

	2025 Unrestricted funds £	2024 Unrestricted funds £	2025 Restricted funds £	2024 Restricted funds £	2025 Total funds £	2024 Total funds £
Income						
Grants and donations	81,114	16,830	87,490	55,916	168,604	72,746
Interest	4,645	2,559	-	-	4,645	2,559
Legacy	-	5,000	-	-	-	5,000
Client shopping payment	23,088	16,807	-	-	23,088	16,807
Gift Aid	2,780	717	150	-	2,930	717
Other income	12,760	6,161	-	-	12,760	6,161
Total income	124,387	48,074	87,640	55,916	212,027	103,990
Expenditure						
Salaries NI and pensions	6,887	4,719	64,260	56,758	71,147	61,477
Payroll charges	139	207	751	617	890	824
Office costs	3,135	2,931	4,814	3,996	7,949	6,927
Postage	20	657	20	277	40	934
Publishing and stationery	1,374	333	1,539	412	2,913	745
Insurance	-	235	735	428	735	663
Publications and subscriptions	216	243	75	110	291	353
Room hire	320	512	6,939	4,372	7,259	4,884
Bank charges	593	75	33	-	626	75
Security and data protection	174	340	-	-	174	340
Staff training	-	125	-	35	-	160
Transport hire	-	268	769	546	769	814
Volunteer expenses	469	115	833	1,697	1,302	1,812
Volunteer shopping reimbursements	23,106	16,758	-	-	23,106	16,758
Independent examination	300	358	888	692	1,188	1,050
Staff expenses	194	43	247	153	441	196
IT costs	1,327	788	3,688	5,286	5,015	6,074
Event costs	1,454	473	7,167	6,450	8,621	6,923
Legal and professional costs	200	-	-	2,160	200	2,160
Total expenditure	39,908	29,180	92,758	83,989	132,666	113,169
Net income / (expenditure)	84,479	18,894	(5,118)	(28,073)	79,361	(9,179)
Transfers between funds	-	551	-	(551)	-	-
Net movement in funds	84,479	19,445	(5,118)	(28,624)	79,361	(9,179)
Fund balances brought forward	65,932	46,487	45,864	74,488	111,796	120,975
Fund balances carried forward	150,411	65,932	40,746	45,864	191,157	111,796