OLDER PEOPLE'S ACTION IN THE LOCALITY

England & Wales · Charity number 1131792

Details

Other names	OPAL
Status	Registered
Legal form	Charitable company
Company number	06961204
Registered	2009-09-24
Register	View on the Charity Commission register

Contact

Address	Ceo Welcome In Community Centre 55 Bedford Drive Leeds LS16 6DJ
Phone	01132619103
Email	admin@opal-project.org.uk
Website	www.opal-project.org.uk

Activities

Objects: THE OBJECTS ARE TO FURTHER OR BENEFIT THE RESIDENTS OF COOKRIDGE, HOLT PARK, IRELAND WOOD, TINSHILL, ADEL AND BRAMHOPE (MOST OF THE LEEDS 16 POSTCODE)AND SURROUNDING AREAS, PARTICULARLY BUT NOT EXCLUSIVELY FOR THE ELDERLY, WITHOUT DISTINCTION OF SEX, SEXUAL ORIENTATION, RACE OR OF POLITICAL, RELIGIOUS OR OTHER OPINIONS BY ASSOCIATING TOGETHER THE SAID RESIDENTS AND THE LOCAL AUTHORITIES, VOLUNTARY AND OTHER ORGANISATIONS IN A COMMON EFFORT TO ADVANCE EDUCATION AND TO PROVIDE FACILITIES IN THE INTERESTS OF SOCIAL WELFARE FOR RECREATION AND LEISURE TIME OCCUPATION WITH THE OBJECTIVE OF IMPROVING THE CONDITIONS OF LIFE FOR THE RESIDENTS AND TO STRENGTHEN THE LOCAL COMMUNITIES IN WHICH THEY LIVE.

Activities: Supporting older people who live in Leeds 16 to live informed, healthy and happy lives in their own homes. Through offering a wide range of activities and services to older people, we promote independence and reduce social isolation.OPAL is based in, and manages Welcome In Community Centre and Cafe. The centre is a community anchor and is a safe and friendly space for all.

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Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** Education/training, Disability, Amateur Sport, Recreation, Other Charitable Purposes
- **Who:** Elderly/old People, People With Disabilities

Geography

- **Area of benefit:** COOKRIDGE, HOLT PARK, IRELAND WOOD, TINSHILL, ADEL AND BRAMHOPE
- Leeds City

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£571,292	£573,375	-	-
2024-03-31	£618,927	£550,958	£863,369	12
2023-03-31	£368,820	£422,522	-	-
2022-03-31	£384,028	£365,465	-	-
2021-03-31	£445,344	£277,306	-	-

Trustees

Name	Role	Appointed
Martin Sellens	Chair	2016-12-13
Elizabeth Locke		2016-12-13
Farooq Muzammal		2024-07-30
GRACE CLARK		2018-10-17
Gary Hartley		2021-01-27
John Sutcliffe		2021-11-24
Louise Tanner		2021-11-24
Richard Walter Welch Mr		2026-03-04

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OLDER PEOPLE'S ACTION IN THE LOCALITY

England & Wales - Charity number 1131792

Accounts

Older People's Action in the Locality

Charity number 1131792

A company limited by guarantee number 06961204

Annual Report and Financial Statements

for the year ended 31 March 2025

OPAL

OLDER PEOPLE'S
ACTION IN THE LOCALITY

WYCAS
COMMUNITY ACCOUNTING
WEST YORKSHIRE

Older People's Action in the Locality

Annual Report and Financial Statements

for the year ended 31 March 2025

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Prepared by West Yorkshire Community Accountancy Service CIO

Older People's Action in the Locality

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
Martin Sellens	Chair	
Louise Tanner	Treasurer	
Peter Ellis		Resigned 22 January 2025
Grace Clark		
Gary Hartley		
Elizabeth Locke		
John Sutcliffe		
Farooq Muzammal		Appointed 30 July 2024

Charity number	1131792	Registered in England and Wales
Company number	06961204	Registered in England and Wales

Registered and principal address	Bankers	
Welcome In Community Centre	Nat West Bank	Cambridge and Counties Bank
55 Bedford Drive	Great George St	Charnwood Court
Leeds	Leeds	5B New Walk
LS16 6DJ	LS1 3EX	Leicester
		LE1 6TE

Independent examiner

Simon Bostrom FCIE

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 14 July 2009. It is governed by a memorandum and articles of association as amended 18 June 2020. The liability of the members in the event of the company being wound up is limited to a sum not exceeding £1.

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.

Objectives and activities

The charity's objects

The objects are to further or benefit the residents of Cookridge, Holt Park, Ireland Wood, Tinshill, Adel and Bramhope (most of the Leeds 16 postcode) and surrounding areas, particularly but not exclusively for the elderly, without distinction of sex, sexual orientation, race or of political, religious or other opinions by associating together the said residents and the local authorities, voluntary and other organisations in a common effort to advance education and to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents and to strengthen the local communities in which they live.

The charity's main activities

OPAL reduces social isolation and promotes the wellbeing of older people so that they can live independently in their own homes. We do this by offering opportunities for healthy living and social activities, practical support and an information service.

OPAL is based in and manages the Welcome In Community Centre and Community Cafe. The Centre and Cafe is a facility for all the community and provides a source of revenue for OPAL as well as providing opportunity for integration of older people with the wider community.

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 the health and wellbeing of older people.

Achievements and performance

OPAL (Older People's Action in the Locality) is proud to be a Community Anchor who are based in and manage the Welcome In Community Centre—a warm, inclusive, and vibrant space at the heart of the community. Our Community Café, open to all, is a vital social hub frequented by OPAL members, families with young children, individuals with learning disabilities, and support workers with those they care for.

As a volunteer-led organisation, we are powered by a dedicated team of over 100 volunteers and 14 (mainly part time) staff, working together to support the wellbeing of older people in our community.

Transforming Lives

Over the past year, OPAL has made a significant impact, supporting more than 800 older people, many of whom were facing isolation and loneliness. Through a wide range of services and activities, we help older individuals stay connected, supported, and empowered to live independently in their own homes.
Our activity programme includes:

- Exercise classes including tai chi, chair exercise, yoga, line dancing.
- Social groups including games groups, Friday socials and day trips
- X3 weekly Luncheon clubs
- Support groups for carers and carerd for, those who are bereaved, and individuals living with dementia as well as assisted shopping trips
- Digital support

Achievements and performance continued

Enhance

- Collaborating with health workers to host a weekly health hub enabling people to get medical support such as wound care, in a community setting.
- Providing additional one-to-one support to older people with health support needs. Prevent hospital admission, supporting when discharged from hospital, help navigating health systems and ensuring the individual has the support in place for the best quality of life possible.

Innovative Transport Project

Launched in January 2024 and developed through the year, our new transport project is already thriving. With an accessible minibus, a wheelchair-accessible car, a dedicated Transport Coordinator, and a team of volunteer drivers, we've made it easier for frail and disabled individuals to:

- Access social, health, and wellbeing activities
- Attend essential health and hospital appointments

Supporting Independence

Our team provides one-to-one support to help older people navigate everyday challenges. This includes:

- Help with benefits, bus passes, and navigating health and social care systems
- Advocacy and hands-on support when needed
- Welfare calls, emergency shopping, and wellbeing check-ins—especially during adverse weather
- Home visits for those needing additional support, such as carers or individuals who are recently bereaved

Tackling Food Insecurity

Our Community Café offers a welcoming and stigma-free space for everyone. Through our 'Pay As You Feel' meals, we ensure no one goes hungry. We also run a weekly Fareshare 'market', using surplus food to support our community and reduce food waste.

Addressing Climate Change

With grant funding we have reduced our carbon footprint through the installation of solar panels, improved insulation in the building, changing light fittings to LED and installed a bike shed to encourage carbon free travel. As part of our climate change project, we designed and produced information leaflets for community members to tell them how they too could make easy changes to reduce their carbon footprint too.

Plans for future periods

Due to recent funding cuts, we have made the difficult decision to reduce staff hours and the Enhance Project, including the Health Hub, has now come to an end. We have also reduced our digital support offer. We are pleased however, to confirm that all other services will continue as normal.

We have partially secured funding to replace our 15-year-old minibus and are actively fundraising to cover the remaining costs. We're also excited to share that we have secured funding for the final stage of our grounds renovation project. This will involve transforming the condemned steps area into a new, accessible sensory garden, creating a welcoming and accessible outdoor space for everyone to enjoy.

Financial review

The net expenditure for the year was £2,083, including net income of £37,939 on unrestricted funds and net expenditure of £40,022 on restricted funds after transfers.

Reserves policy

The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the charity, which equates to between £181,000 and £316,750 based on budgeted expenditure of £543,000. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors. The purpose of the reserves is to ensure that OPAL is resilient to, and has the capacity to manage unforeseen financial challenges.

The charity's free reserves, excluding fixed assets, at the year end were £255,937.

The calculation for the reserves is as follows:

The total funds held at the year end were £861,286. Restricted funds were £71,565, leaving £789,721 in unrestricted funds. Excluding fixed assets of £533,784 leaves £255,937 as unrestricted free reserves. Free reserves at the previous year end were £188,977.

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 10/09/2025

John Sutcliffe (Trustee)

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

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 19.

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
Since the charitable company's gross income exceeded £250,000 your examiner must be a fellow of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a fellow of ACIE which is one of the listed bodies.

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.

Simon Bostrom FCIE

26/09/2025

West Yorkshire Community Accountancy Service CIO
Stringer House
34 Lupton Street
Leeds
LS10 2QW

Older People's Action in the Locality

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:					
Donations and legacies	(2)	74,530	233,637	308,167	360,811
Charitable activities	(3)	164,211	80,646	244,857	230,422
Other trading activities	(4)	9,679	-	9,679	19,234
Bank interest		8,067	-	8,067	8,370
Other income		522	-	522	90
Total income		257,009	314,283	571,292	618,927
Expenditure on:					
Charitable activities	(5)	239,596	333,779	573,375	550,958
Total expenditure		239,596	333,779	573,375	550,958
Net income / (expenditure)		17,413	(19,496)	(2,083)	67,969
Transfers between funds	(6)	20,526	(20,526)	-	-
Net movement in funds		37,939	(40,022)	(2,083)	67,969
Fund balances brought forward		751,782	111,587	863,369	795,400
Fund balances carried forward	(6)	789,721	71,565	861,286	863,369

All incoming resources and resources expended derive from continuing activities.

Older People's Action in the Locality

Balance sheet

as at 31 March 2025

		2025 Unrestricted £	2025 Restricted £	2025 Total £	2024 Total £
Fixed assets					
Tangible assets	(7)	533,784	-	533,784	562,805
Total fixed assets		533,784	-	533,784	562,805
Current assets					
Debtors and prepayments	(8)	4,807	885	5,692	8,859
Current asset investments	(9)	166,012	-	166,012	161,609
Cash at bank and in hand	(10)	93,640	70,680	164,320	136,955
Total current assets		264,459	71,565	336,024	307,423
Current liabilities: amounts falling due within one year					
Creditors and accruals	(11)	8,522	-	8,522	6,859
Total current liabilities		8,522	-	8,522	6,859
Net current assets / (liabilities)		255,937	71,565	327,502	300,564
Net assets		789,721	71,565	861,286	863,369
Funds					
Unrestricted funds		789,721	-	789,721	751,782
Restricted funds		-	71,565	71,565	111,587
Total funds		789,721	71,565	861,286	863,369

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 10/09/2025

John Sutcliffe (Trustee)

Older People's Action in the Locality

Statement of cash flows

for the year ended 31 March 2025

	2025	2024
	£	£
Cash flows from operating activities:		
Net cash provided by (used in) operating activities	45,826	86,267
Cash flows from investing activities:		
Bank interest	8,067	8,370
Purchase of tangible fixed assets (excluding donated assets)	(22,125)	(64,819)
Net cash provided by (used in) investing activities	(14,058)	(56,449)
Cash flows from financing activities:		
Repayments on borrowing	-	-
Cash inflows from new borrowing	-	-
Net cash provided by (used in) financing activities	-	-
Change in cash and cash equivalents in the reporting period	31,768	29,818
Cash and cash equivalents at the beginning of the reporting period	298,564	268,746
Cash and cash equivalents at the end of the reporting period	330,332	298,564

Reconciliation of net movement in funds to net cash flow from operating activities	2025	2024
	£	£
Net movement in funds for the reporting period (as per the statement of financial activities)	(2,083)	67,969
Adjustments for:		
Depreciation charges	51,146	47,374
Bank interest	(8,067)	(8,370)
Loan interest	-	-
(Increase) / decrease in debtors	3,167	(767)
Increase / (decrease) in creditors	1,663	(19,939)
Net cash provided by (used in) operating activities	45,826	86,267

Analysis of cash and cash equivalents	2025	2024
	£	£
Cash in hand	319	224
Notice deposits	330,013	298,340
Total cash and cash equivalents	330,332	298,564

Older People's Action in the Locality

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.
Donated goods for resale are valued at the amount actually realised upon their sale.
Donated assets, facilities or services are valued at their estimated value to the charity. This is the price that the charity estimates it would pay in the open market for equivalent items; or services and facilities of equivalent utility to the charity.

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.

Tangible fixed assets

Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition. Gifted assets are shown at the value to the charity on receipt.

Depreciation is provided on all tangible fixed assets at rates calculated to write off the cost on a straight line basis over their expected useful economic lives as follows:

Fixtures and equipment: over 5 years
Leasehold improvements: over the life of the lease

1 Accounting policies continued

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.

Leases
Rents under operating leases are charged on a straight line basis over the lease term or to an earlier date if the lease can be determined without financial penalty.

2 Donations and legacies

	2025 Unrestricted funds £	2025 Restricted funds £	2025 Total funds £	2024 Total funds £
Charles and Elsie Sykes Trust	-	4,000	4,000	-
Harrison and Potter Trust	-	4,920	4,920	4,200
Hedley Foundation	-	1,000	1,000	-
Incredible Edible	-	115	115	-
Leeds Benevolent Society	30,000	-	30,000	-
Leeds City Council (LCC)	-	4,520	4,520	30,292
Leeds Community Foundation (LCF)	-	20,189	20,189	24,178
Leeds Older Peoples Forum (LOPF)	-	55,000	55,000	60,215
Motability Foundation	-	93,173	93,173	168,618
National Lottery Community Fund (NLCF)	-	10,000	10,000	3,140
Voluntary Action Leeds	-	19,750	19,750	21,900
Wades Charity	-	1,200	1,200	-
Windmill	-	1,000	1,000	2,000
West Yorks. Combined Authority (WYCA) / LCC	-	18,770	18,770	-
Brighter Days	-	-	-	1,148
Sanctuary Housing	-	-	-	4,340
Other grants and donations (including gift aid)	44,530	-	44,530	40,780
	74,530	233,637	308,167	360,811

3 Charitable activities income

	2025 Total funds £	2024 Total funds £
LCC Adult Social Care service provision	80,646	81,324
Café	58,833	49,810
Groups, events and activities	71,709	65,388
Memberships	7,831	6,977
Room hire	22,823	26,923
Transport	3,015	-
	244,857	230,422

4 Other trading activities

	2025 Total funds £	2024 Total funds £
Fundraising	4,382	11,016
Events	2,357	2,958
Sponsorships	-	1,774
Rental income	2,620	3,486
Minibus hire	320	-
	9,679	19,234

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2025

5 Charitable activities expenditure

	Activities undertaken directly	Grant funding of activities	Support costs	2025 Total cost	2024 Total cost
	£	£	£	£	£
Charitable activities	433,793	57,454	82,128	573,375	550,958
	433,793	57,454	82,128	573,375	550,958

5a Support costs

Support cost type	2025 Total cost £	2024 Total cost £
Management and admin salaries	66,336	68,461
Financial management support	7,130	6,577
Payroll fees	2,590	2,322
IT support	4,292	3,977
Independent examination	1,449	1,449
Meeting costs	331	250
	82,128	83,036

5b Charitable activities expenditure detail

		2025 Unrestricted funds £	2025 Restricted funds £	2025 Total cost £	2024 Total cost £
Salaries NI and pensions	(8c)	111,586	179,544	291,130	239,119
Payroll costs		-	2,590	2,590	2,322
Staff travel expenses		351	711	1,062	1,003
Training and recruitment		116	3,631	3,747	2,513
Volunteer expenses and training		431	431	862	469
Events and activities		38,125	35,378	73,503	83,415
Café supplies and equipment		20,389	3,040	23,429	22,042
Equipment and materials		930	1,349	2,279	3,289
Premises costs		10,091	21,448	31,539	36,700
Phone, postage and internet		219	3,441	3,660	6,317
Computers and IT		-	4,517	4,517	4,247
Printing and stationery		123	1,501	1,624	1,809
Memberships and subscriptions		27	1,187	1,214	1,345
Insurance		-	6,233	6,233	5,464
Hospitality and sundry costs		244	162	406	183
Governance costs		422	1,092	1,514	1,696
Independent examination		-	1,449	1,449	1,449
Legal, professional and consultancy		350	6,282	6,632	-
Repairs and maintenance		5,046	6,104	11,150	7,295
Depreciation		51,146	-	51,146	47,374
Grants repaid		-	1,239	1,239	-
Vehicle running costs		-	9,592	9,592	3,518
Grants payable		-	42,858	42,858	79,389
		239,596	333,779	573,375	550,958

5c Staff costs and numbers

	2025	2024
	£	£
Gross salaries	263,695	219,881
Social security costs	19,158	15,095
Employment allowance	(5,000)	(5,000)
Pensions	8,157	6,233
Freelance workers	5,120	2,910
	291,130	239,119

The average number of employees during the year was 13.5, being an average of 8.9 full time equivalent (2024: 12.4, 8.2 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	8,157	6,233
Amount of any contributions outstanding at the year end	-	-
Amount of any contributions prepaid at the year end	-	-

5d Grant making

Project or activity	2025 Grants to institutions £	2024 Grants to institutions £	2025 Grants to individuals £	2024 Grants to individuals £
Motability Partnership	42,858	79,389	-	-
Household support vouchers	-	-	14,596	12,815
Total	42,858	79,389	14,596	12,815

Motability Partnership	To purchase own wheelchair accessible car and minibus as well as employ a Transport Coordinator enabling OPAL to develop their transport offer.
Household support vouchers	To give ASDA shopping vouchers to individuals and families identified as in need.

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2025

6 Restricted funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
NLCF Salary	-	10,000	1,232	-	8,768
Charles and Elsie Sykes	-	4,000	-	-	4,000
LCF Friday Lunch club	-	1,816	1,816	-	-
LCF Monday Lunch club	-	1,816	1,816	-	-
LCF Wednesday Lunch club	-	1,557	1,557	-	-
LOPF Enhance	5,602	55,000	60,602	-	-
Harrison and Potter 2024	-	4,920	4,290	-	630
Harrison and Potter 2023	976	-	976	-	-
Hedley Foundation	-	1,000	1,000	-	-
Incredible Edible	-	115	115	-	-
LCC Solar panels	2,450	2,450	-	(4,900)	-
LCC ASC grant	20,132	80,646	95,702	-	5,076
WYCA / LCC Climate Change	-	18,770	5,224	(13,546)	-
LCC ABCD	25,678	-	25,678	-	-
LCC Small Sparks Fund	133	-	133	-	-
Leeds Civic Trust	300	-	300	-	-
LCC MICE	150	300	150	-	300
Motability Foundation	47,321	93,173	87,703	-	52,791
LCC ONWCC	-	885	885	-	-
LCC INWCC	-	885	885	-	-
LCF Resilience	1,495	15,000	16,495	-	-
Sanctuary Housing	3,639	-	1,559	(2,080)	-
NLCF Sport England	1,239	-	1,239	-	-
LCF	212	-	212	-	-
Voluntary Action Leeds	2,260	19,750	22,010	-	-
Wades Charity	-	1,200	1,200	-	-
Windmill transport	-	1,000	1,000	-	-
	111,587	314,283	333,779	(20,526)	71,565

Fund name	Purpose of restriction
NLCF Salary	Community Connections funding.
Charles and Elsie Sykes	Towards digital support costs.
LCF Friday Lunch club	Towards lunch club costs.
LCF Monday Lunch club	Towards lunch club costs.
LCF Wednesday Lunch club	Towards lunch club costs.
LOPF Enhance	For support with hospital discharge and prevent hospital admission.
Harrison and Potter 2024	Towards exercise classes and Christmas activities.
Harrison and Potter 2023	Towards Friday social, Christmas banquet and Christmas dinner.
Hedley Foundation	Towards chair exercise classes.
Incredible Edible	For the community garden project.
LCC Solar panels	Towards providing solar panels at Welcome In. The transfer relates to the purchase of solar panels which have been capitalised.
LCC ASC grant	For OPAL's work supporting older people.
WYCA / LCC Climate Change	Towards carbon footprint reduction. The transfer relates to the purchase of solar panels and a bike shed which have been capitalised.
LCC ABCD	To deliver the ABCD project.
LCC Small Sparks Fund	To distribute to community members for community development work.

6 Restricted funds continued

Fund name	Purpose of restriction
Leeds Civic Trust	Towards a community bench.
LCC MICE	Bus fares for walking group.
Motability Foundation	Provision in conjunction with AVSED of transport services.
LCC ONWCC	Towards Christmas activities.
LCC INWCC	Towards Christmas activities.
LCF Resilience	To help build strategies for organisational resilience.
Sanctuary Housing	For a Community event, Women's Peer support Group and Bereavement Support Group. The transfer relates to internal room hire charges.
NLCF Sport England	Provision of adapted sports sessions.
LCF	Towards cost of providing warm spaces.
Voluntary Action Leeds	Warm space provision.
Wades Charity	Towards Christmas hampers.
Windmill transport	Towards the cost of trips.

7 Tangible assets

	Motor vehicles	Leasehold property	Fixtures and equipment	Total
Cost	£	£	£	£
At 1 April 2024	34,951	692,233	58,981	786,165
Additions	-	-	22,125	22,125
At 31 March 2025	34,951	692,233	81,106	808,290
Depreciation				
At 1 April 2024	8,738	184,687	29,935	223,360
Charge for year	8,738	28,226	14,182	51,146
At 31 March 2025	17,476	212,913	44,117	274,506
Net book value				
At 31 March 2025	17,475	479,320	36,989	533,784
At 31 March 2024	26,213	507,546	29,046	562,805

8 Debtors and prepayments

	2025	2024
	£	£
Prepayments	-	-
Accrued income	5,692	8,859
	5,692	8,859

9 Current asset investments

	2025	2024
	£	£
Cash equivalents on deposit	166,012	161,609
	166,012	161,609

10 Cash at bank and in hand

	2025	2024
	£	£
Cash at bank	164,001	136,731
Cash in hand	319	224
	164,320	136,955

11 Creditors and accruals

	2025	2024
	£	£
Creditors	6,938	5,410
Accruals	1,449	1,449
Other creditors	135	-
	8,522	6,859

12 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 £81,236 (previous year: £71,478).

Other related party transactions
During the year, Matthew Sellens (son of Martin Sellens) was paid £3,284 in respect of security and caretaking at the Welcome in (2024: £2,600). Authority for the payment is provided for by the charity's governing document.

13 Operating leases

Expected future minimum lease payments over the remaining life of the lease, analysed into the period in which the commitment falls due:	2025	2024
	£	£
Within one year	1	132
In the second to fifth years inclusive	4	528
Over five years from the balance sheet date	45	1,738
	50	2,398

The lease is essentially a peppercorn rent, if demanded, for 50 years.

Older People's Action in the Locality

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						
Donations and legacies	74,530	36,842	233,637	323,969	308,167	360,811
Charitable activities	164,211	149,098	80,646	81,324	244,857	230,422
Other trading activities	9,679	19,234	-	-	9,679	19,234
Bank interest	8,067	8,370	-	-	8,067	8,370
Other income	522	90	-	-	522	90
Total income	257,009	213,634	314,283	405,293	571,292	618,927
Expenditure						
Charitable activities	239,596	267,257	333,779	283,701	573,375	550,958
Total expenditure	239,596	267,257	333,779	283,701	573,375	550,958
Net income / (expenditure)	17,413	(53,623)	(19,496)	121,592	(2,083)	67,969
Transfers between funds	20,526	44,641	(20,526)	(44,641)	-	-
Net movement in funds	37,939	(8,982)	(40,022)	76,951	(2,083)	67,969
Fund balances brought forward	751,782	760,764	111,587	34,636	863,369	795,400
Fund balances carried forward	789,721	751,782	71,565	111,587	861,286	863,369

OLDER PEOPLE'S ACTION IN THE LOCALITY

England & Wales - Charity number 1131792

Accounts

Older People's Action in the Locality

Charity number 1131792

A company limited by guarantee number 06961204

Annual Report and Financial Statements

for the year ended 31 March 2024

OPAL

OLDER PEOPLE'S
ACTION IN THE LOCALITY

WYCAS
COMMUNITY ACCOUNTING
WEST YORKSHIRE

Older People's Action in the Locality

Annual Report and Financial Statements

for the year ended 31 March 2024

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Prepared by West Yorkshire Community Accountancy Service CIO

Older People's Action in the Locality

Trustees' report for the year ended 31 March 2024

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
Martin Sellens	Chair	
Louise Tanner	Treasurer	
Howard Marshall		Resigned July 2023
Peter Ellis		
Grace Clark		
Gary Hartley		
Christopher Hindle		Resigned September 2023
Elizabeth Locke		
Jennifer Ward		Resigned January 2024
John Sutcliffe		
Farooq Muzammal		Appointed July 2024

Charity number	1131792	Registered in England and Wales
Company number	06961204	Registered in England and Wales

Registered and principal address	**Bankers**	
Welcome In Community Centre	Nat West Bank	Cambridge and Counties Bank
55 Bedford Drive	491 Otley Road	Charnwood Court
Leeds	Leeds	5B New Walk
LS16 6DJ	LS16 7YB	Leicester
		LE1 6TE

Independent examiner

Simon Bostrom FCIE

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 14 July 2009. It is governed by a memorandum and articles of association as amended 18 June 2020. The liability of the members in the event of the company being wound up is limited to a sum not exceeding £1.

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.

Older People's Action in the Locality

Trustees' report (continued) for the year ended 31 March 2024

Objectives and activities

The charity's objects

The objects are to further or benefit the residents of Cookridge, Holt Park, Ireland Wood, Tinshill, Adel and Bramhope (most of the Leeds 16 postcode) and surrounding areas, particularly but not exclusively for the elderly, without distinction of sex, sexual orientation, race or of political, religious or other opinions by associating together the said residents and the local authorities, voluntary and other organisations in a common effort to advance education and to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents and to strengthen the local communities in which they live.

The charity's main activities

OPAL reduces social isolation and promotes the wellbeing of older people so that they can live independently in their own homes. We do this by offering opportunities for healthy living and social activities, practical support and an information service.

OPAL is based in and manages the Welcome In Community Centre and Community Cafe. The Centre and Cafe is a facility for all the community and provides a source of revenue for OPAL as well as providing opportunity for integration of older people with the wider community.

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 the health and wellbeing of older people.

Achievements and performance

OPAL plays a very important role in many people’s lives and provides, to those who have various needs later in life, an environment where lives are enriched and friendships can flourish. We continue to consolidate our work at the Welcome In Community Centre and serve older people in our area and the wider community. Our membership numbers remain steady whilst many of our activities are at or near capacity and the range of our activities on offer is wide ranging and attractive. The café has seen increased patronage and we continue to get new people visiting us with positive feedback and reviews.

- Accessible transport: Funding secured from Motability to purchase our own Wheelchair Accessible Car and minibus as well as employ a Transport Coordinator enabling us to develop our transport offer.
- Health and Well-being Initiatives: additional chair exercise class, memory support group and a bereavement support group introduced to meet increased demand.
- Volunteer Contribution: We have over 100 active volunteers contributing 10,285 hours of service. That’s equivalent to 5.5 FT staff members and an equivalent financial contribution of £107,170 (based on minimum wage). Volunteers have received training in first aid, dementia awareness, wheelchair handling and more.
- Building maintenance and development work including:
- New boilers installed (money raised from fundraising – thanks to all!)
- New signage on the building and around the site
- Community composting now in place in the grounds
- Existing garage refurbished and let (asbestos removed and new door)
- New building management system in place
- New electricity contract entered into saving us money
- New digital phone system installed and alarm system updated
- Funding secured to install solar panels on the roof and climate change measures

Plans for future periods

The lack of long-term funding poses a significant challenge for OPAL. To address this, we are actively developing a comprehensive fundraising strategy that includes individual donations, corporate sponsorships, and grant applications to secure our financial stability. Additionally, we are committed to reducing operational costs wherever possible. As part of this effort, we are implementing measures to lower our carbon footprint, which will further help in minimising expenses.

We are also focused on strengthening our partnerships with health and social care providers, local businesses, and other agencies to create a robust support network for older adults and the broader community.

In January 2024, we launched the Community Transport project, which aims to enhance accessible transport for older and disabled individuals within our community. We plan to further develop this initiative to ensure it meets the growing needs of those we serve.

Lastly, we will continue to consolidate our existing services and activities at OPAL and Welcome In, ensuring we effectively meet the needs of older adults and the wider community.

Financial review

The net income for the year was £67,969, including net expenditure of £8,982 on unrestricted funds and net income of £76,951 on restricted funds after transfers.

Reserves policy

The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the charity, which equates to between £165,667 and £289,917 based on budgeted expenditure of £497,000. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors. The purpose of the reserves is to ensure that OPAL is resilient to, and has the capacity to manage unforeseen financial challenges.

The charity's free reserves, excluding fixed assets, at the year end were £188,977.

The calculation for the reserves is as follows:

The total funds held at the year end were £863,369. Restricted funds were £111,587, leaving £751,782 in unrestricted funds. Excluding fixed assets of £562,805 leaves £188,977 as unrestricted free reserves. Free reserves at the previous year end were £211,372.

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 August 2024

Louise Tanner (Trustee)

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2024, which are set out on pages 7 to 18.

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
Since the charitable company's gross income exceeded £250,000 your examiner must be a fellow of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a fellow of ACIE which is one of the listed bodies.

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.

Simon Bostrom FCIE

11 September 2024

West Yorkshire Community Accountancy Service CIO
Stringer House
34 Lupton Street
Leeds
LS10 2QW

Older People's Action in the Locality

Statement of Financial Activities

(including summary income and expenditure account)

for the year ended 31 March 2024

	Notes	2024 Unrestricted funds £	2024 Restricted funds £	2024 Total funds £	2023 Total funds £
Income from:					
Donations and legacies	(2)	36,842	323,969	360,811	151,110
Charitable activities	(3)	149,098	81,324	230,422	203,538
Other trading activities	(4)	19,234	-	19,234	10,231
Bank interest		8,370	-	8,370	2,836
Other income		90	-	90	1,105
Total income		213,634	405,293	618,927	368,820
Expenditure on:					
Charitable activities	(5)	267,257	283,701	550,958	422,522
Total expenditure		267,257	283,701	550,958	422,522
Net income / (expenditure)		(53,623)	121,592	67,969	(53,702)
Transfers between funds	(6)	44,641	(44,641)	-	-
Net movement in funds		(8,982)	76,951	67,969	(53,702)
Fund balances brought forward		760,764	34,636	795,400	849,102
Fund balances carried forward	(6)	751,782	111,587	863,369	795,400

All incoming resources and resources expended derive from continuing activities.

Older People's Action in the Locality

Balance sheet

as at 31 March 2024

		2024 Unrestricted £	2024 Restricted £	2024 Total £	2023 Total £
Fixed assets					
Tangible assets	(7)	562,805	-	562,805	545,360
Total fixed assets		562,805	-	562,805	545,360
Current assets					
Debtors and prepayments	(8)	4,519	4,340	8,859	8,092
Current asset investments	(9)	161,609	-	161,609	105,930
Cash at bank and in hand	(10)	29,708	107,247	136,955	162,816
Total current assets		195,836	111,587	307,423	276,838
Current liabilities: amounts falling due within one year					
Creditors and accruals	(11)	6,859	-	6,859	26,798
Total current liabilities		6,859	-	6,859	26,798
Net current assets / (liabilities)		188,977	111,587	300,564	250,040
Net assets		751,782	111,587	863,369	795,400
Funds					
Unrestricted funds		751,782	-	751,782	760,764
Restricted funds		-	111,587	111,587	34,636
Total funds		751,782	111,587	863,369	795,400

For the year ending 31 March 2024 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 August 2024

Louise Tanner (Trustee)

Older People's Action in the Locality

Statement of cash flows

for the year ended 31 March 2024

	2024	2023
	£	£
Cash flows from operating activities:		
Net cash provided by (used in) operating activities	86,267	4,451
Cash flows from investing activities:		
Bank interest	8,370	2,836
Purchase of tangible fixed assets (excluding donated assets)	(64,819)	(2,801)
Net cash provided by (used in) investing activities	(56,449)	35
Cash flows from financing activities:		
Repayments on borrowing	-	(28,876)
Cash inflows from new borrowing	-	-
Net cash provided by (used in) financing activities	-	(28,876)
Change in cash and cash equivalents in the reporting period	29,818	(24,390)
Cash and cash equivalents at the beginning of the reporting period	268,746	293,136
Cash and cash equivalents at the end of the reporting period	298,564	268,746

Reconciliation of net movement in funds to net cash flow from operating activities	2024	2023
	£	£
Net movement in funds for the reporting period (as per the statement of financial activities)	67,969	(53,702)
Adjustments for:		
Depreciation charges	47,374	32,663
Bank interest	(8,370)	(2,836)
Loan interest	-	1,221
(Increase) / decrease in debtors	(767)	3,105
Increase / (decrease) in creditors	(19,939)	24,000
Net cash provided by (used in) operating activities	86,267	4,451

Analysis of cash and cash equivalents	2024	2023
	£	£
Cash in hand	224	201
Notice deposits	298,340	268,545
Total cash and cash equivalents	298,564	268,746

Older People's Action in the Locality

Notes to the accounts

for the year ended 31 March 2024

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.
Donated goods for resale are valued at the amount actually realised upon their sale.
Donated assets, facilities or services are valued at their estimated value to the charity. This is the price that the charity estimates it would pay in the open market for equivalent items; or services and facilities of equivalent utility to the charity.

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.

Tangible fixed assets

Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition. Gifted assets are shown at the value to the charity on receipt.

Depreciation is provided on all tangible fixed assets at rates calculated to write off the cost on a straight line basis over their expected useful economic lives as follows:

Fixtures and equipment: over 5 years
Leasehold improvements: over the life of the lease

1 Accounting policies continued

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.

Leases
Rents under operating leases are charged on a straight line basis over the lease term or to an earlier date if the lease can be determined without financial penalty.

2 Donations and legacies

	2024 Unrestricted funds £	2024 Restricted funds £	2024 Total funds £	2023 Total funds £
Brighter Days	-	1,148	1,148	-
Harrison and Potter Trust	-	4,200	4,200	5,530
Leeds City Council (LCC)	192	30,100	30,292	38,490
Leeds Community Foundation (LCF)	-	24,178	24,178	8,588
Leeds Older Peoples Forum (LOPF)	-	60,215	60,215	51,400
Motability Foundation	-	168,618	168,618	-
National Lottery Community Fund (NLCF)	-	3,140	3,140	-
Sanctuary Housing	-	4,340	4,340	-
Voluntary Action Leeds	-	21,900	21,900	13,750
Windmill	-	2,000	2,000	-
Barca	-	-	-	1,500
Co-op Local Community Fund	-	-	-	3,854
Leeds Civic Trust	-	-	-	450
Leeds Convalescent Society	-	-	-	500
Leeds Culture Trust	-	-	-	400
Local Care Partnership (LCP)	-	-	-	3,125
Other grants and donations (including gift aid)	36,650	4,130	40,780	23,523
	36,842	323,969	360,811	151,110

3 Charitable activities income

	2024 Total funds £	2023 Total funds £
LCC Adult Social Care service provision	81,324	80,646
Café	49,810	42,956
Groups, events and activities	65,388	57,576
Memberships	6,977	7,693
Room hire	26,923	14,667
	230,422	203,538

4 Other trading activities

	2024 Total funds £	2023 Total funds £
Fundraising	11,016	1,779
Events	2,958	607
Sponsorships	1,774	115
Rental income	3,486	7,730
	19,234	10,231

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2024

5 Charitable activities expenditure

	Activities undertaken directly	Grant funding of activities	Support costs	2024 Total cost	2023 Total cost
	£	£	£	£	£
Charitable activities	375,718	92,204	83,036	550,958	422,522
	375,718	92,204	83,036	550,958	422,522

5a Support costs

Support cost type	2024 Total cost	2023 Total cost
	£	£
Management and admin salaries	68,461	66,393
Financial management support	6,577	6,643
Payroll fees	2,322	2,052
IT support	3,977	4,069
Independent examination	1,449	1,449
Meeting costs	250	26
	83,036	80,632

5b Charitable activities expenditure detail

		2024 Unrestricted funds	2024 Restricted funds	2024 Total cost	2023 Total cost
		£	£	£	£
Salaries NI and pensions	(8c)	143,944	95,175	239,119	230,432
Payroll costs		-	2,322	2,322	2,052
Staff travel expenses		281	722	1,003	1,298
Training		-	2,513	2,513	599
Volunteer expenses and training		40	429	469	589
Events and activities		38,444	44,971	83,415	79,444
Café supplies and equipment		17,382	4,660	22,042	20,053
Equipment and materials		2,236	1,053	3,289	2,520
Premises costs		10,253	26,447	36,700	25,439
Phone, postage and internet		-	6,317	6,317	5,675
Computers and IT		-	4,247	4,247	4,339
Printing and stationery		97	1,712	1,809	532
Memberships and subscriptions		-	1,345	1,345	4,532
Insurance		-	5,464	5,464	4,989
Hospitality and sundry costs		76	107	183	291
Governance costs		-	1,696	1,696	324
Independent examination		-	1,449	1,449	1,449
Repairs and maintenance		7,064	231	7,295	4,081
Depreciation		47,374	-	47,374	32,663
Loan interest		-	-	-	1,221
Vehicle running costs		66	3,452	3,518	-
Grants payable		-	79,389	79,389	-
		267,257	283,701	550,958	422,522

5c Staff costs and numbers

	2024	2023
	£	£
Gross salaries	219,881	214,332
Social security costs	15,095	14,986
Employment allowance	(5,000)	(5,000)
Pensions	6,233	6,114
Freelance workers	2,910	-
	239,119	230,432

The average number of employees during the year was 12.4, being an average of 8.2 full time equivalent (2023: 12.5, 8 FTE). There were no employees with emoluments above £60,000.

Defined contribution pension scheme	2024	2023
	£	£
Costs of the scheme to the charity for the year	6,233	6,114
Amount of any contributions outstanding at the year end	-	-
Amount of any contributions prepaid at the year end	-	-

5d Grant making

Project or activity	2024 Grants to institutions £	2023 Grants to institutions £	2024 Grants to individuals £	2023 Grants to individuals £
Motability Partnership	79,389	-	-	-
Household support vouchers	-	-	12,815	11,876
Total	79,389	-	12,815	11,876

Motability Partnership	To purchase own wheelchair accessible car and minibus as well as employ a Transport Coordinator enabling Opal to develop their transport offer.
Household support vouchers	To give ASDA shopping vouchers to individuals and families identified as in need.

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2024

6 Restricted funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
LOPF Brighter days	-	1,148	1,148	-	-
Local Care Partnership (LCP)	2,143	-	2,143	-	-
LCF Lunch clubs	-	7,416	7,416	-	-
LOPF Enhance	5,621	52,920	52,939	-	5,602
LCC Housing Advisory Panel	525	-	525	-	-
Harrison and Potter 1	2,115	-	2,115	-	-
Harrison and Potter 2	-	4,200	3,224	-	976
LCC summer holiday	-	700	700	-	-
LCC ASC grant	1,508	81,324	57,140	(5,560)	20,132
LCC ABCD	21,418	25,000	20,740	-	25,678
LCC Little Library	-	1,300	1,300	-	-
LCC Public Health	-	500	500	-	-
LCC Small Sparks Fund	456	-	323	-	133
Leeds Civic Trust	450	-	150	-	300
Leeds Convalescent Society	400	-	400	-	-
LOPF Refreshments	-	50	50	-	-
LOPF Warm spaces	-	2,245	2,245	-	-
LCC MICE	-	150	-	-	150
Motability Foundation	-	168,618	86,346	(34,951)	47,321
Donation for lifting equipment	-	4,130	-	(4,130)	-
LCF Resilience	-	15,000	13,505	-	1,495
Sanctuary Housing	-	4,340	701	-	3,639
LCC Solar panels	-	2,450	-	-	2,450
NLCF Sport England	-	3,140	1,901	-	1,239
LCF Stay well this winter	-	1,762	1,550	-	212
Voluntary Action Leeds	-	16,700	14,440	-	2,260
Voluntary Action Leeds	-	1,200	1,200	-	-
VAL Welcome space	-	4,000	4,000	-	-
Windmill Comm. Transport	-	2,000	2,000	-	-
LOPF Covid transport	-	5,000	5,000	-	-
	34,636	405,293	283,701	(44,641)	111,587

Fund name	Purpose of restriction
LOPF Brighter days	To provide Christmas hampers
Local Care Partnership (LCP)	Towards the cost of providing warm spaces
LCF Lunch clubs	Towards the luncheon club costs
LOPF Enhance	For support with hospital discharge and prevent hospital admission
LCC Housing Advisory Panel	Towards peer support group costs addressing mental health problems
Harrison and Potter 1	To fund exercise classes
Harrison and Potter 2	Towards Friday social, Christmas banquet and Christmas dinner
LCC summer holiday	Towards providing childrens summer holiday activites
LCC ASC grant	For OPAL's work supporting older people. The transfer relates to the purchase of fixed assets for the general purposes of the charity.
LCC ABCD	To deliver the ABCD project
LCC Little Library	To install a free library on the Silk Mill housing estate
LCC Public Health	Towards peer support groups with long term health conditions
LCC Small Sparks Fund	To distribute to community members for community development work
Leeds Civic Trust	Towards a community bench
Leeds Convalescent Society	To extend the provision assisted shopping
LOPF Refreshments	Towards refreshments
LOPF Warm spaces	Warm space provision

6 Restricted funds continued

Fund name	Purpose of restriction
LCC MICE	Bus fares for walking group
Motability Foundation	Provision in conjunction with AVSED of transport services. The transfer relates to the purchase of a wheelchair accessible vehicle and a minibus.
Donation for lifting equipment	Individual donation for the purchase of lifting equipment. The transfer relates to the purchase fixed assets for the general purposes of the charity.
LCF Resilience	Grant to help build up strategies for future
Sanctuary Housing	For a Community event, Women's Peer support Group and Bereavement Support Group
LCC Solar panels	Towards providing solar panels at Welcome In
NLCF Sport England	Provision of adapted sports sessions
LCF Stay well this winter	Towards cost of providing warm spaces
Voluntary Action Leeds	Warm space provision
Voluntary Action Leeds	Warm space provision
VAL Welcome space	Towards cost of providing welcome space at Welcome In
Windmill Comm. Transport	Towards cost of transport for day trips
LOPF Covid transport	Towards transport costs for Covid vaccinations

7 Tangible assets

	Motor vehicles	Leasehold property	Fixtures and	Total
Cost	£	£	£	£
At 1 April 2023	-	692,233	29,113	721,346
Additions	34,951	-	29,868	64,819
At 31 March 2024	34,951	692,233	58,981	786,165
Depreciation				
At 1 April 2023	-	156,461	19,525	175,986
Charge for year	8,738	28,226	10,410	47,374
At 31 March 2024	8,738	184,687	29,935	223,360
Net book value				
At 31 March 2024	26,213	507,546	29,046	562,805
At 31 March 2023	-	535,772	9,588	545,360

8 Debtors and prepayments

	2024	2023
	£	£
Prepayments	-	1,567
Accrued income	8,859	6,525
	8,859	8,092

9 Current asset investments

	2024	2023
	£	£
Cash equivalents on deposit	161,609	105,930
	161,609	105,930

10 Cash at bank and in hand

	2024	2023
	£	£
Cash at bank	136,731	162,615
Cash in hand	224	201
	136,955	162,816

11 Creditors and accruals

	2024	2023
	£	£
Creditors	5,410	4,509
Amounts received on account for contracts / performance related grants	-	20,840
Accruals	1,449	1,449
	6,859	26,798

12 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.

Other related party transactions
During the year, Matthew Sellens (son of Martin Sellens) was paid £2,600 in respect of security and caretaking at the Welcome in (2023: £2,735). Authority for the payment is provided for by the charity's governing document.

13 Operating leases

Expected future minimum lease payments over the remaining life of the lease, analysed into the period in which the commitment falls due:	2024	2023
	£	£
Within one year	132	132
In the second to fifth years inclusive	528	528
Over five years from the balance sheet date	1,738	1,870
	2,398	2,530

Older People's Action in the Locality

Statement of Financial Activities including comparatives for all funds (including summary income and expenditure account) for the year ended 31 March 2024

	2024 Unrestricted funds £	2023 Unrestricted funds £	2024 Restricted funds £	2023 Restricted funds £	2024 Total funds £	2023 Total funds £
Income						
Donations and legacies	36,842	23,523	323,969	127,587	360,811	151,110
Charitable activities	149,098	122,892	81,324	80,646	230,422	203,538
Other trading activities	19,234	10,231	-	-	19,234	10,231
Bank interest	8,370	2,836	-	-	8,370	2,836
Other income	90	1,105	-	-	90	1,105
Total income	213,634	160,587	405,293	208,233	618,927	368,820
Expenditure						
Charitable activities	267,257	186,417	283,701	236,105	550,958	422,522
Total expenditure	267,257	186,417	283,701	236,105	550,958	422,522
Net income / (expenditure)	(53,623)	(25,830)	121,592	(27,872)	67,969	(53,702)
Transfers between funds	44,641	-	(44,641)		-	-
Net movement in funds	(8,982)	(25,830)	76,951	(27,872)	67,969	(53,702)
Fund balances brought forward	760,764	786,594	34,636	62,508	795,400	849,102
Fund balances carried forward	751,782	760,764	111,587	34,636	863,369	795,400

OLDER PEOPLE'S ACTION IN THE LOCALITY

England & Wales - Charity number 1131792

Accounts

The Queen's Award for Voluntary Service

The MBE for volunteer groups

WELCOME IN Community Centre & Cafe

OPAL

OLDER PEOPLE'S ACTION IN THE LOCALITY

Reducing isolation and improving the quality of life for older people



Annual Report

1st April 2022 - 31st March 2023

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Welcome to OPAL

From our CEO Ailsa Rhodes MBE

It's been lovely to see increased numbers of OPAL members feeling more confident to join in social activities and wanting to rebuild their lives after 2 years of lock downs. The living crisis has however, impacted many OPAL members and in response to this, we have done our best to ensure that the cost of activities has remained as low as possible. We also introduced the Warm Space on Mondays where people could enjoy a warm welcome playing board games and a cuppa and snack. We distributed food parcels and ASDA vouchers to people who were struggling with the cost of living. OPAL is a delivery partner for the Enhance Project which means we have been able to offer extra support to people recently discharged from hospital.

Over the festive period Ralph Thoresby school delivered their fabulous annual Christmas Banquet which was enjoyed by 120 OPAL members. OPAL staff and a great team of volunteers cooked and served a Christmas dinner on Christmas Eve for people who would otherwise be on their own over Christmas and hampers were delivered to our oldest members.

We have continued to develop the Welcome In Community Centre as the Community Anchor for Leeds16. Our Community Fun Day in September and Christmas Fayre have become annual events which not only raise money for OPAL but are also great fun for everyone attending. There are many services and activities now accessed within the Welcome In which helps make LS16 a stronger, more connected community.

OPAL prides itself on being a catalyst for community engagement. We have developed Welcome In into a space where friendships are forged, ideas are shared, and creativity flourishes. Whether you're looking for a tasty, affordable meal, to join a walking group, access support or simply connect with your neighbours, Welcome In Community Centre opens its doors with open arms, fostering a true sense of community spirit.



As my final word, I would like to thank everyone at OPAL and to our many partners for the nomination and support of my MBE. I am honoured to receive the award and honoured to work at OPAL where so many great people work so hard for the benefit of others.

Chairman's Report

From the Chair of Trustees, Martin Sellens

I can report on another eventful and busy year in the life of OPAL as we continue to support older people in the Leeds 16 area and reduce loneliness and isolation. There is also that growing sense of community in our local area and OPAL plays a key role in being a hub and meeting point for the local community of all age ranges. As we have sought to increase our income base the café, our front door open to all, has got busier, particularly around lunchtimes. We have also seen an increase in the rental of rooms within the building and income from activities that take place either within or from the building. We receive much positive feedback about the things we do which is testament to the valuable work that is being carried out day by day over the course of a year. We have also grown partnerships with other organisations in the past year to provide additional services. Our reputation as a successful Neighbourhood Network Scheme in the City is widely held and we must continue to work hard and develop to retain that reputation.

Can I on behalf of OPAL thank all the staff and volunteers who are involved in providing and assisting in all of our activities, inside and outside the building – we could not do it without you and your contribution is deeply appreciated by so many. As a Management Committee we have sought over the past year to be supportive of our staff recognising that many have experienced difficulty through ill health or family situations which has led to enforced absences affecting our activities – thank you for bearing with us through what has been a trying time for many. During the challenges we have given 7 staff members permanent contracts to reduce uncertainty over their futures with us. We also gave flat rate bonuses to our staff at the start of January 2023 in recognition of the cost-of-living crisis. The only staff change in the year was that Mandy Moran left us in September 2022 having secured a permanent full-time role elsewhere – we have missed her but wish her well in her new job and thank her for her contribution to OPAL in the time she was with us.

We celebrated our 20th Birthday at a special community event on 1st July and at about that time Ailsa received notification that she had been awarded an MBE in the Queens's Jubilee Honours List. She received her award at the Palace in February this year from Prince William in what was a memorable occasion. Ailsa has also during the year, with the support of the Management Committee, become a Trustee of the St George Martin Trust.

Chairman's Report Continued

We continue to apply for Core funding from the Council as well as funding for our Enhance and ABCD projects to pay the wages of our staff. I am pleased to report that those funds are secure for another year with possible extensions for some into 2025. They are not totally reliable however as some projects are time limited so we are constantly reviewing these matters. The SWIFT project, for example, ended in 2022/23. As with many other charities the financial outlook remains uncertain and often funding is short-term, meaning we are constantly looking to apply for grants to support and develop our activities.

During this year we have done less work on the building but continue to try and keep it looking attractive and vibrant. We have upgraded the dishwasher in the kitchen and are in the process of improving and modernising the signage around the building and the attractiveness of the grounds. Our thanks go to all the volunteers who have helped on gardening days and particularly to Pauline and Martin Drury who have taken a leading and active part in improving the planting around the building.

I would love to tell you that we now have a new 50 year lease of the building and grounds from the Council but alas progress is painfully slow. Whilst heads of terms of the lease have been largely agreed we still do not have the final document and so we have recently raised it through official political channels in the Council to try and get it over the line.

Finally I must thank those people who give of their time to sit on The Management Committee of OPAL. We are all volunteers who seek to bring our various skills to help OPAL through the year. We meet every 6 weeks and receive reports, review policies, discuss issues and the finances and oversee the operation of the Charity. There were no changes to The Management Committee in 2022/23. There is always an opportunity for volunteers and members to feed their comments or raise any issues directly with the Committee if you want to do so – it is always helpful to receive feedback.




























Meet some of our OPAL members!







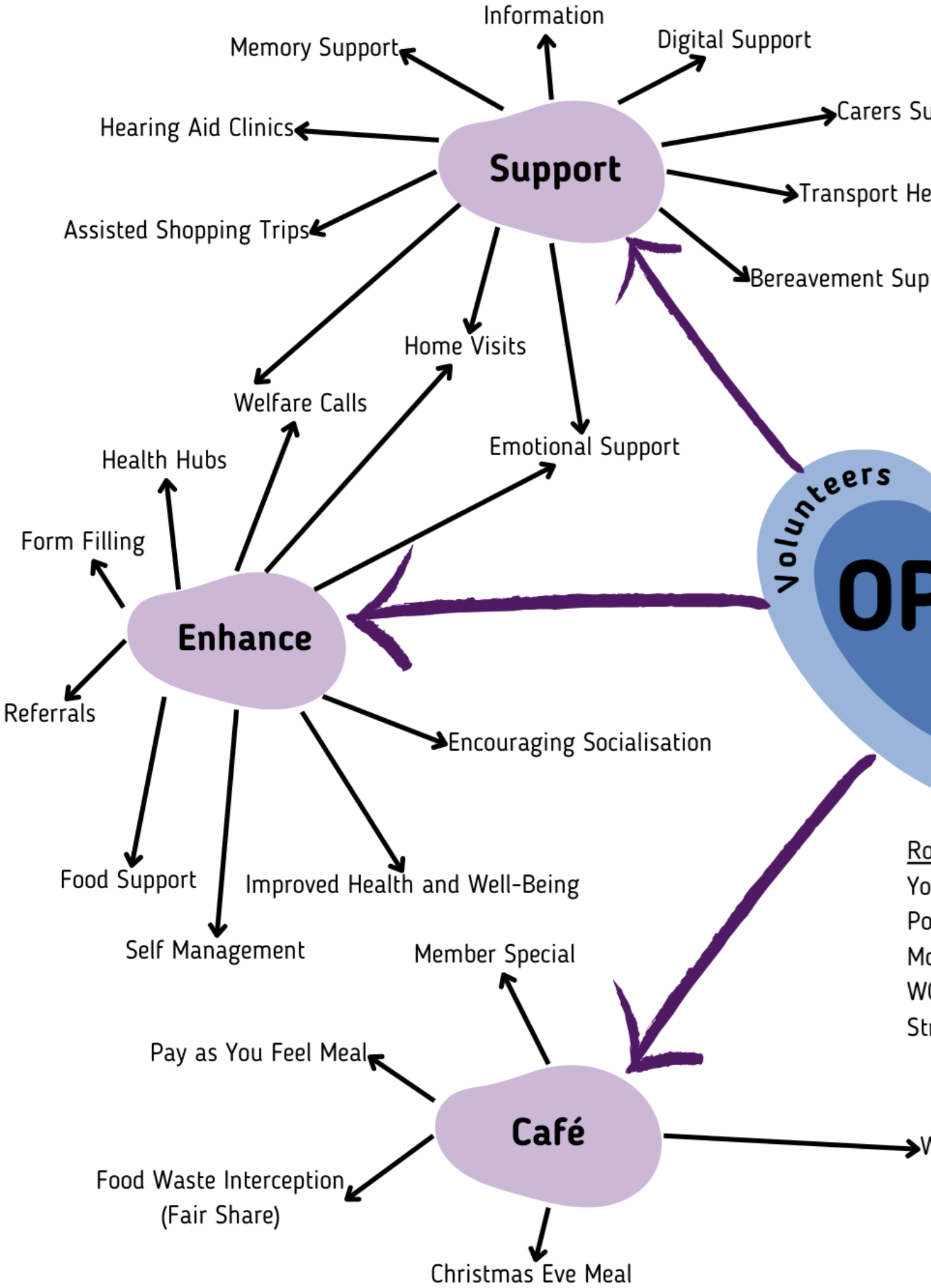


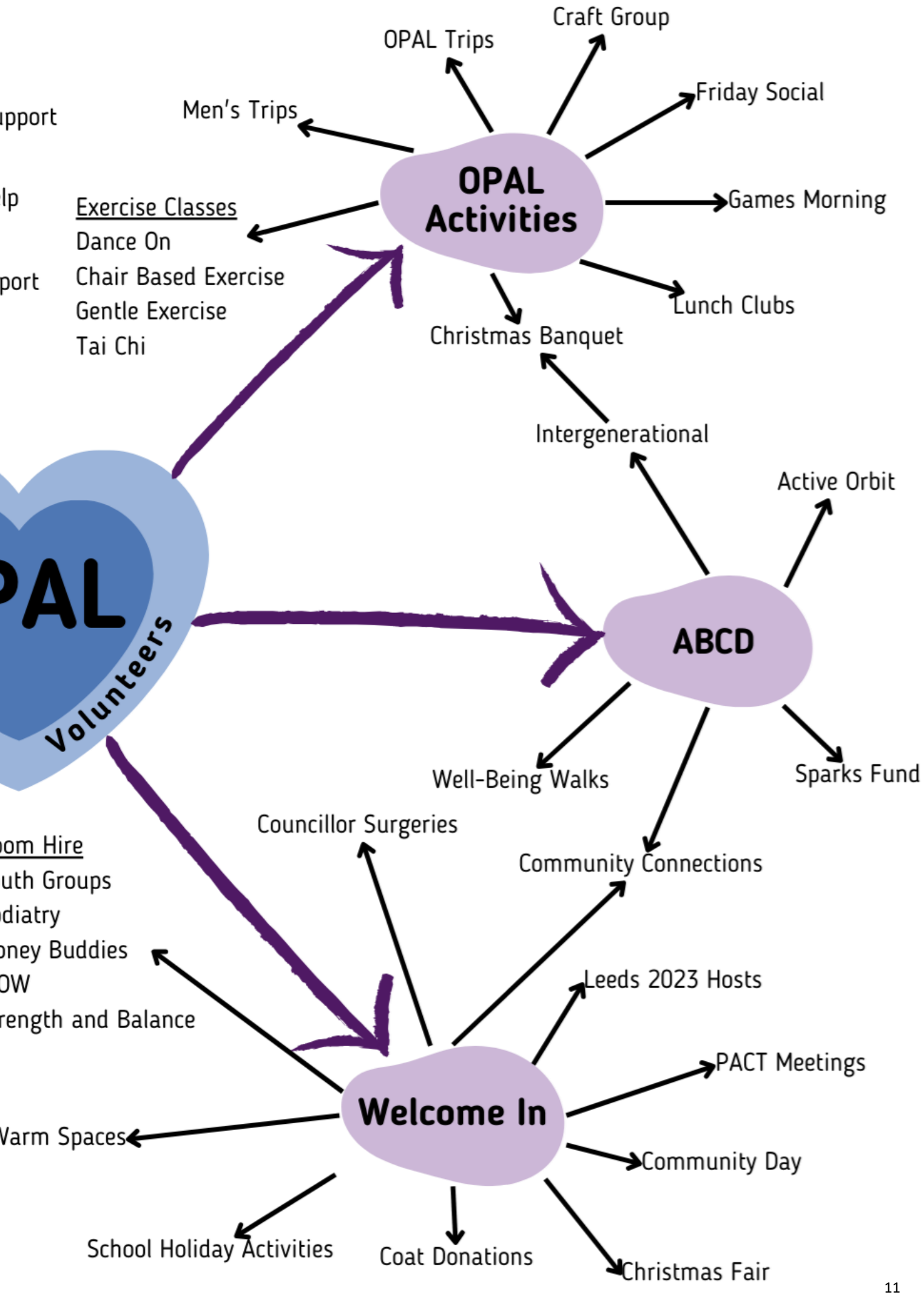









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OP
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Self Management
Member Special
Pay as You Feel Meal
Café
Food Waste Interception
(Fair Share)
Christmas Eve Meal


Craft Group
OPAL Trips
Friday Social
Men's Trips
upport
OPAL Activities
lp
Exercise Classes
Games Morning
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port
Chair Based Exercise
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OW
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Leeds 2023 Hosts
PACT Meetings
Welcome In
Warm Spaces
Community Day
School Holiday Activities
Coat Donations
Christmas Fair

Health and Information

OPAL staff and volunteers recognise the value of friendship. As friends, we notice the little things such as changes in behaviour or health and we will support people to get help when they need it.

SWIFt

OPAL's SWIFt project supported people who need regular and consistent encouragement to help them overcome social anxiety and other mental/physical health problems. This project meant we could provide more intensive support to older people with complex health and social care needs. The SWIFt project came to an end at the beginning of April 2022. The Enhance project started in May 2023.

Enhance

The Enhance project is very similar to the SWIFt project, however, with an emphasis on support after a hospital discharge, and preventing hospital admission. We do emergency shopping, home visits so we can advocate/give moral support, and can accompany individuals to appointments. If appropriate, we will contact a social worker/GP/other health professional to ensure that OPAL members are safe and well.

Health Hubs

As part of the Enhance project, we have recently started running twice-weekly health hubs. One health hub is by appointment only (arranged through the neighbourhood team), and focuses primarily on wound care. The other health hub is available for drop in advice, or by appointment for treatment.

Hearing Clinics

In partnership with Leeds Hearing and Sight Loss Service, OPAL host a hearing aid clinic once a quarter. This is a chance for members, and non-members, to come to OPAL and get their NHS hearing aid tubes and batteries changed for free. They are drop-in sessions and have proven to be very popular.

OPAL's Information Services

The information side of OPAL is available to all older people and they can contact us via OPAL's Drop In office, by phone or by email. We help people renew bus passes, apply for blue badges, give information about home help, trades people, benefits and much, much more. Information is also shared via our bimonthly newsletter which is available on CD, USB, cassette or in large print, and we also invite speakers/professionals to some of our groups to keep OPAL members informed. OPAL continues to make/receive referrals to/from carers, family members and other agencies to ensure OPAL members receive all the support available to them.

Warm and Well



Winter Wellbeing

Each year we do as much as we can to ensure our members stay warm and well whether that's loaning heaters, doing emergency food shopping, wellbeing visits or phone calls. This year we also ran a project which involved opening the community café an extra day for older people and the wider community so they could access hot snacks such as toast, bagels and crumpets, hot drinks and information about keeping warm and well, all while playing a variety of board games. This project helped us reach new members and helped reduce loneliness and isolation.



Christmas Eve Meal

On Saturday 24th December we opened our doors for a festive Christmas Eve meal for our members who didn't have any Christmas plans, and who were going to be alone over the festive period. It was such a lovely day, and those who came thoroughly enjoyed it. Our members had a three course Christmas dinner, and they also had musical entertainment from staff and volunteers. Each member also got a small gift to take home with them. Holbeck Together provided minibus transport for free on this day which was very much appreciated.





Winter Coat Appeal

We partnered with Zero Waste Leeds over the winter period to collect and donate coats, hats, gloves and scarves to those who needed them. With the help of OPAL members and members of the local community we were able to collect over 300 coats! These coats were then in our entrance way for people to take for free if they needed them, with some of them distributed around Leeds.



Household Support Fund

Winter can be a tricky time for lots of people. Gas and electric bills are more expensive which can mean that some people struggle with food bills. Over the winter period, OPAL partnered with Leeds Anchor Network to distribute food vouchers under the Household Support Scheme to those in need. This project was a success and we will be continuing it in the future.



Christmas Hamper

Every year at OPAL we create over 80 Christmas hampers to deliver to our oldest and most vulnerable members. We have a team of amazing volunteers who help us pack and deliver these winter treats, and we team up with a local supermarket who gives us a discount on the goodies.



Intergenerational

One of the areas that gives OPAL staff the most pleasure is to witness the interaction of our Intergenerational projects. They are always enjoyed immensely by OPAL members and the positive effect is there for both young and old. The Annual Christmas Banquet organised by Ralph Thoresby High School for 120 OPAL members was a phenomenal success and was well received.

Another project we ran was a warm meal and craft activity every Wednesday afternoon - all for free. This event happened through the winter months, and as it was a late afternoon/early evening activity, it meant parents and children were able to call in on their way home from school.

We have had students from local high schools, and Leeds City College, come on work placement with us. The students were involved in group activities, helping with the administration, helping during lunch clubs and in the café.

Two students from Leeds Becketts University undertook their social work placement with us here at OPAL. This placement is a requirement of their course to work in industry and both placements have been a success to OPAL and to both these as individuals. This long term placement meant that each student was able to develop their skills and experiences whilst enabling extra support to OPAL members.

At Christmas we were treated to some Christmas carols sung by students from Ireland Wood Primary School! The school students walked here and performed for us, before heading to the café to get a snack before returning to school. They were lovely to watch and our members thoroughly enjoyed it!







Tackling Loneliness and Isolation

One of the main principles of OPAL is giving our members the opportunity to make friends and connect with this wonderful local community. We have seen first hand the detrimental effect on the mental health of those who are lonely and isolated. The centre's activities and services are designed to stimulate and encourage social interaction. We send Birthday Cards to all our members and our oldest members are given Christmas Hampers which are always appreciated. We have 77 OPAL members aged 90+ years.

OPAL organises and provides 20 plus regular social activities. These activities promote and encourage our members to socialise and make friends. The centre's openness and proactive support makes it as effortless as possible for our members to join in. We make reminder phone calls and during this process we will encourage and support our members to participate. Wherever possible we provide transport, including wheelchair accessible transport, and we provide volunteer assistance for those who require it.







Here is a list of our regular OPAL activities:

Welcome In café
Monday, Wednesday and Friday Lunch clubs
Carers and cared-for support group
Bereavement support group
Memory support group
Volunteer assisted shopping trips
Day trips
Games mornings
Men's group trips
Craft group
Friday Social
Exercise classes: Tai Chi, Dance On, gentle exercise, chair based exercise, yoga

We simply wouldn't be able to provide all that we do without our magnificent group of volunteers. The demographic of volunteers is varied. The benefit of these social activities doesn't just have a positive impact on our members, the impact can be seen with our volunteers also. The Volunteer infrastructure doesn't just get involved in the activities, we try and include those that have an interest into the management and strategy of the centre. It is extremely useful to obtain feedback from all aspects of the centre in order for accurate and relevant decisions to be made. Everything we all do is for the benefit of older people in our community.

OPAL Support

Memory Support

43 OPAL members have dementia and many more identify themselves as having memory problems. All OPAL activities are accessible to people with memory challenges and Dementia. OPAL staff and 12 volunteers are trained in Dementia Awareness. We use a number of strategies to encourage participation in our groups including prompting phone calls and liaising with family and carers.



We have our Memory Support Group specifically for people with memory problems and their carers giving both information and friendship. This project is led by Sally-Anne who has a Post Graduate Diploma from Bradford University in Dementia Studies. She ensures the range of relevant activities are tailored specifically to the group of individuals attending to best meet their needs.

Carers Support



We also have our Carers Group that runs fortnightly alternately to the Memory Support Group. This group is for carers and the people they care for. The carers are in one room and the cared-for in another. This provides a comfortable and safe space for carers to chat to people in similar situations, whilst knowing the person they care for is in the room next door joining in with a stimulating activity.



Sally-Anne, Bev and Shelley are the staff members at this group, along with volunteers.

Digital Support



Steve is our digital inclusion officer. He runs our Digital Support Class on a Wednesday afternoon. This class follows a 12 week program where members can learn the basics to enable them to use their iPad, tablet, phone or device in a way that suits them.

Steve also runs a drop-in session on Friday afternoons, and he also offers one-to-one digital support either at home or at the Welcome In Community Centre.

OPAL Support Continued

OPAL's Home Support

OPAL as an organisation encourages and facilitates our members to leave their homes to socialise. We know only too well that some of our members struggle to get out and about and so for these people we offer our Friendly Visiting Service. As OPAL formulates relationships with our members, we use our knowledge to match individuals to a suitable volunteer and then the volunteer visits them on a regular basis. There is a waiting list for this service, and we are always recruiting new volunteers to help us meet the demand. For people who need it, we also offer a Telephone Link service offering regular telephone calls. During lockdowns we had 450+ older people matched to a phone buddy and we continue to hear of ongoing friendships and ongoing phone contact as a legacy of this.

OPAL staff made 379 home visits to make assessments or give support.

As part of our standard process home visits are offered to every new member to discuss OPAL and what we can offer, and we can do an assessment to ascertain what our members' needs are. We also visit members who are going through a difficult time or are feeling particularly isolated but don't yet have a befriender. Whether it is a power of attorney or a benefits application, we have trained staff to assist or guide our members through the process of filling out forms.

In snowy and icy conditions, we will phone as many members as possible to check they are warm, have food in the house and that their heating is working ok. We loan heaters, help get tradespeople to fix heating, refer to specialist agencies or just have a chat to those who are housebound and going stir crazy because they can't get out of the house.

Bereavement Support

This year we started a Bereavement Café to support our members with a recent bereavement. This is an informal group in a safe and comfortable environment, with other members going through something similar. This group is led by Sally-Anne, and is fortnightly on a Friday morning. You can talk as much or as little as you like in this group, and those who come to it have said how much it has helped them.

Improving Physical Health

"Exercise can also help improve age-related deterioration in physical and mental conditions and studies of older adults who exercise, have found that they have fewer chronic diseases and feel better about their own health."

- Active Ageing, Anchor Hanover Group

Within the NHS guidelines it is positively encouraged as a matter of improving physical health. They state older adults should do some type of physical activity every day. It can help to improve your health and reduce the risk of heart disease and stroke.

- aim to be physically active every day, even if it's just light activity
- do activities that improve strength, balance and flexibility on at least 2 days a week
- reduce time spent sitting or lying down, and break up long periods of not moving with some activity

We accept that there are different levels of fitness and health limitations. Here at OPAL we know our instructors have many years experience and will work with our members' limitations to improve physical health. We have over 100 OPAL members that exercise with OPAL on a weekly basis.



Our Exercise programme includes:

- Tai Chi: designed to improve balance and inner strength
- Chair Exercise: improves participants' strength and balance
- Gentle Exercise: Improves participants' aerobic fitness and core strength
- Table Tennis: not only improves general fitness but improves spatial awareness and hand eye coordination

In partnership with Yorkshire Dance:

- Dance On: improves general fitness, timing and is great for falls prevention

<u>The Alzheimer's Society</u>

Of all the lifestyle changes that have been studied, taking regular physical exercise appears to be one of the best things that you can do to reduce your risk of getting dementia.

OPAL has a therapy room that allows the centre to deliver therapeutic services such as massage. Lyndsey volunteers her time and services once a week on a Monday morning, offering massages to our members for only £10 per session.

Partnerships and Support from other Agencies



Here at OPAL we believe that by sharing and receiving knowledge, experience and skills we help not only our members, but the Leeds community as a whole. We believe there is real strength in working collaboratively and we take every opportunity available to us to work with other agencies and groups. This same philosophy extends to the groups we run, as members will gain knowledge, experience and skills working together.

- The Welcome In Café is used by several groups such as the WOW group and Knit and Natter group.
- OPAL hosts and supports the local Police and Communities Together (PACT) meetings at Welcome In.
- We hosted multiple kids' summer holiday activities in the centre, with kids eating free in the café with a paying adult.
- Local Councillors deliver their monthly surgery from Welcome In.
- Youth Services deliver two weekly Youth Groups from the Centre.
- Dance On - Yorkshire Dance deliver fun dance sessions which improve balance, memory and coordination.
- The Wednesday Lunch Club love having their lunch at High Farm Pub who also organise live music and entertainment as part of the afternoon.
- EcoClean, Home Instead Ltd, Bellwether Yarns and West Yorkshire Police are our anchor tenants at Welcome In.
- Westward Care pay for the design and printing costs of our newsletter. They introduced us to Tom, Dick and Harry Studio who design our Newsletter as well as our Welcome In logo and signs.
- OPAL members benefit greatly from the partnerships we have with many Health and Social Care agencies such as Linking Leeds, Social Prescribing Service, Community Care Coordinators, Woodsley and Holt Park Local Care Partnership, Primary Care Network and Adult Social Care.
- Our work in the community is enhanced through partnerships with local churches, schools and local businesses.
- We have a pay as you feel meal in the cafe for those who may be struggling.
- We worked with Zero Waste Leeds to collect and distribute winter coats to those in need.

Welcome In Café



Our community café has gone from strength to strength this last year. The space is vibrant and cosy, and the food is delicious. We host a variety of groups, including the WOW group, Knit and Natter, and our Craft Group when they aren't busy in the Heather Room! We have had a number of birthdays in the café too, including our own! It was the Welcome In Community Centre Café's first birthday! It is always lovely when people choose our space for special celebrations. It really is a space for everyone.



The **WOW Group** meet once a week in the café, where they sit together for a chat, and support each other. Once a month they hire the Heather Room for a mindful activity they do together. This group was set up by Mandy, a social prescriber, and now runs with the support and advice of OPAL.



Our local **PCSO's** use the café as a contact point every Thursday morning, 10am-11am. Members of the public can drop-in to chat to them about any issues they may have.



An independent knitting group called **Knit and Natter** use our café space once a month to meet up and knit together with friends over a cuppa.

OPAL has also been host to the **Leeds 2023 Neighbourhood Hosts** for the Weetwood Ward and also the Adel and Wharfedale Ward. They have used our café to work and have meetings.



Our café makes a delicious meal every week to have as our **OPAL Special.** This homecooked meal costs £5.50 for OPAL members, and is popular with many of our members.



During the summer and half term holidays, **kids eat free** in the café with a paying adult. We also have a **Pay as You're Able** meal everyday the café is open. This is a nourishing and delicious homecooked meal, which costs as much as you are able to pay.



Throughout the Easter holidays and the summer holidays we had **kids' activities** at the Welcome In. These included African Drumming Workshops, Crafts and Family Board Games,

Community

Community is very important to us here at OPAL and the Welcome In Community Centre. Each year we host a **community day** for people of all ages, with a BBQ, games, raffle, tombola, and live entertainment. So far we have been lucky and had nice weather during the event! It is always lovely to see so many members of our community all coming together.

In October we celebrated **kindness week.** Our craft group got together and made pompom bees! These pompom bees were then distributed throughout the community, hung on trees, placed on benches, hidden in bus stops, with a kind message for anybody to take. We also had them hung on a tree in the Heather Room for people to take if they wanted one. It was a nice way for our craft group to spread a little bit of kindness

We also have a **Christmas Fayre** each year at the beginning of December. We have a raffle and tombola to raise money for OPAL. We also have independent stalls so you can get some Christmas shopping done, and live entertainment from a brass band! Santa always comes to visit OPAL during our Christmas Fayre, along with his trusty elf friend!

In July we hosted the **Ukrainian Welcome Event** organised by Alex Sobel MP and the Weetwood Ward Councillors. There was such a lovely atmosphere with lots of chat, Ukrainian egg painting, fun activities, and advice and information.







Jubilee









In May 2022 we celebrated the Queen's Platinum Jubilee. We had a busy lunch club, afternoon tea, show and tell, and a performance from Serendipity, all while dressed in red, white and blue! It was a wonderful day full of celebrations, have a look at the photos to see for yourself!

20th Birthday Party

On 1st July 2022 we had a birthday party to celebrate OPAL turning 20 years old! OPAL was established in 2003, where we became a Neighbourhood Network for the Leeds 16 area. Leeds is the only city in the UK who has a charity network for older people (Neighbourhood Network) covering every ward. We used to be based at the back of Asda, Holt Park where we had a small office. We then moved into the Welcome In Community Centre in 2015, where we renovated the whole building into what it looks like today!

Here are some photographs from the 20th birthday party. We had a BBQ, live entertainment, and the Deputy Lord Lieutenant of West Yorkshire cut the birthday cake for us, alongside Martin Sellens, OPAL's chair of trustees.















Our Wonderful Volunteers

OPAL Volunteers are essential to OPAL's ability to provide our first rate service supporting older people in the community. We are extremely fortunate to have our volunteers involved in all aspects of OPAL life. All of our volunteers know that we have an 'open door policy' and if they need to speak to us we will make ourselves available. We really appreciate everything our volunteers do for us in the community and we will give supervision and training where necessary. We host at least two Volunteer Appreciation events a year as a way of saying Thank You for all their help and hard work.

Volunteer Roles include:

- Representation at the Committee Meetings
- Administration
- Cooking
- Serving meals
- Friendly visits
- Phone calls
- Helping with social groups
- Pushing wheelchairs
- Newsletter collation and delivery
- Providing transport
- Gardening
- Massage
- Bookkeeping
- Posting newsletters
- Delivering birthday cards and Christmas hampers
- Providing information
- Fundraising











We are also lucky enough to have many students with us on placement or work experience, from those who are with us for a week or two, to those with us for three or four months. They help the OPAL staff in the offices, and get to know our members at our activities.

Monitoring and Evaluation

Feedback is invaluable and so in order to ensure that we continue to develop our services in a way that meets the needs of OPAL members, we consult with our members and monitor and evaluate our services by:-

- Asking for verbal and written feedback after our activities.
- OPAL members are represented on our Management Committee by several volunteers. Feedback and suggestions from these groups are obtained during the regular volunteer meetings and Management Committee meetings.
- Sending an annual questionnaire to each of our members.
- We are also very welcome to any verbal feedback.

Annual Questionnaire April 2023

We had a response rate of 12% which gives us information and feedback from our users to help us evaluate our services & plan for the future. There were a lot of ideas & comments & all will be looked at and considered.

What are the reasons for you being a member of OPAL?

To meet people - 69%
For the exercise classes - 37%
For the social activities - 51%
For the cooked meals (lunch club) - 31%
For emotional support - 34%
For access to information - 56%
To get help with transport - 23%
If I need support in the future - 56%
To support OPAL - 71%

What difference has OPAL made to you and your life?

I have more friends - 52%
I am less lonely - 37%
I exercise more - 41%
I eat more healthily 31%
I have access to information when I need it - 65%
I have someone I can contact if I need to - 59%
I feel supported - 48%
I feel more connected to my community - 37%
No difference - 7%

What do you like most about OPAL?

An ASSET to everyone in need and an ASSET to our area.
A brilliant organisation within the community and beyond.
Excellent building and facilities, café, wide variety of activities.
So many different people and groups involved, great staff. I love it.
The kindness and friendship from staff, volunteers' and fellow members.
There is always a warm welcome. People and friendships.
I have watched it grow from a few people to a herd of workers.
Welcome In, says it all, what more could we ask for? A HAPPY PLACE.
That it is a help in the community - providing help and companionship for older people.
OPAL does so much and goes that extra mile to help and offer support.
There are lots of things happening for everyone. It's fantastic!



Monitoring and Evaluation

What do you think OPAL should do differently?

It would be helpful to have a men's exercise class on a Monday morning.

We have two exercise classes on a Wednesday morning, and one on a Thursday afternoon. OPAL has continued to evolve and move with time. I'm sure it will commit in the same vein in the future.

Open the café 5 days a week, then on a Saturday too.

We would love to open the café 5 days a week, however at the moment funding doesn't allow this. Hopefully we can work towards this in the future!

Easier access to the Welcome In – how is a person able to get there?

Most of our activities provide transport. We are also on the number 6 bus route.

Maybe a film show occasionally could be a nice entertainment.

We showed films for a while last year, but unfortunately they weren't popular enough to sustain the running of them.

Everything I have experienced so far is very good. Mobile hairdresser would be a good idea – at the OPAL meeting.

We have a list of trades people who are in the local area, this includes mobile hairdressers, please speak to a member of staff if you would like a copy!

Do you rely on public transport or taxis to get out?

50% of those who answered our questionnaire said they rely on public transport or taxis.

Do you find taxis and public transport reliable and accessible?

Most people who answered our questionnaire said they don't find public transport or taxis reliable, with some of the comments including: "They have no respect for the timetable", "Buses are a bit hit or miss, afraid services will deteriorate overtime" and "Taxis don't help me from house to car". Some positive comments included: "taxis are so far fine" and "does seem accessible and reliable so far".

If OPAL had a wheelchair accessible car and driver available for hire, would you use it?

There could by instances when it could be useful.

Yes. I could then join in with daily activities.

It would be nice to have this.

Deafness and social anxiety of travelling alone.

Think it's a great idea.

Comments:

We use the feedback from OPAL members and volunteers to shape our plans for the future. We recognise accessible transport is a big issue and we are working hard to help find a solution to this. Watch this space!

Treasurer's Report

From Louise Tanner

Our total income received fell from £384, 028 in 2022 to £368,820 in 2023. This was mainly due to a fall in grants and donations. Our two main sources of grants are from Leeds City Council (Adult Social Care) and Leeds Older People Forum (Enhance) and together represent just over 35% of our total income. However, both these organisations are under ever increasing budgetary pressures.

The Adult Social Care grant was reduced by 10% in 2021 and has remained at the same reduced level since. We do now have a confirmed two-year extension until September 2025. The Enhance grant has increased by £2,290, an increase of 4.6%. This is against a background of increased expenditure over the previous year.

Our expenditure increased from £365,465 to £421,498, an increase of approximately 15%. This was mainly due to an increase in salaries (our largest item of expenditure) and following the end of Covid restrictions, an increase in events and activities.

We are fortunate that we have surplus funds from previous years. However, these are now being utilised. This means that it is vital that we seek to increase our other income streams such as room hire and donations as much as possible.

Donations and membership fees can be increased by 25% if we are able to claim gift aid on this income. If you pay tax, please sign a gift aid form if you have not done so already. They can be obtained from the OPAL Drop In Office. Please also consider adding a donation to your membership fee if you feel able to do so.

The net loss for the year was £52,678, including a net loss of £24,806 on unrestricted funds and a net loss of £27,872 on restricted funds after transfers. This loss was anticipated in our cash flows and budgets. Our free reserves remain within the range of four and seven months of the resources expended in the operation of the charity. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors.

Treasurer's Report Continued

The Trustees have prepared a budget and cashflow for the next two years which shows a further expected loss. For year 2023/24 we still expect to remain within the range of four and seven months of resources expended however year 24/25, without additional funds secured, will be very financially challenging.

For our long term security, we really need to maximise income through alternative income streams as much as possible. In this respect, we are fortunate in having our own building which gives the possibility and flexibility to enable this to happen. We have minimised costs wherever possible and are taking action to maximise income through as many income streams as possible.

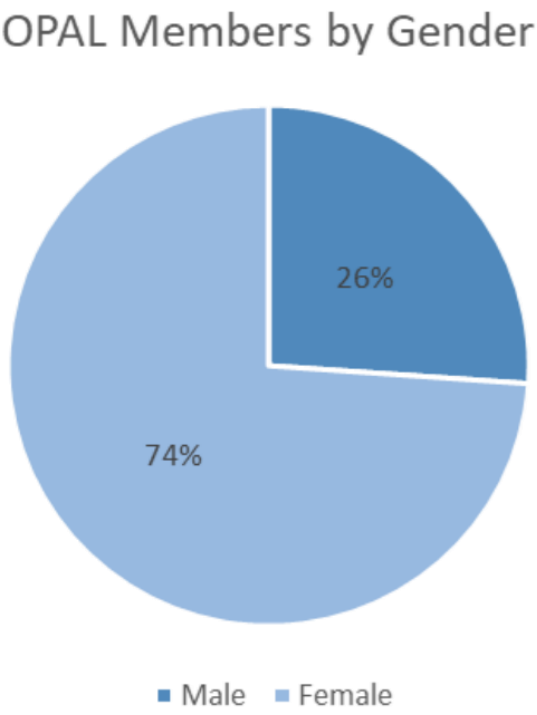
We are very fortunate to have support from Leeds City Council, Public Health, Charitable Trusts and our many other funders. We are optimistic that our partnerships will continue and the impact of OPAL and the Welcome In Community Centre will continue to grow.

As always, we are extremely grateful to those people and businesses that support us financially no matter how big or small the donation is.



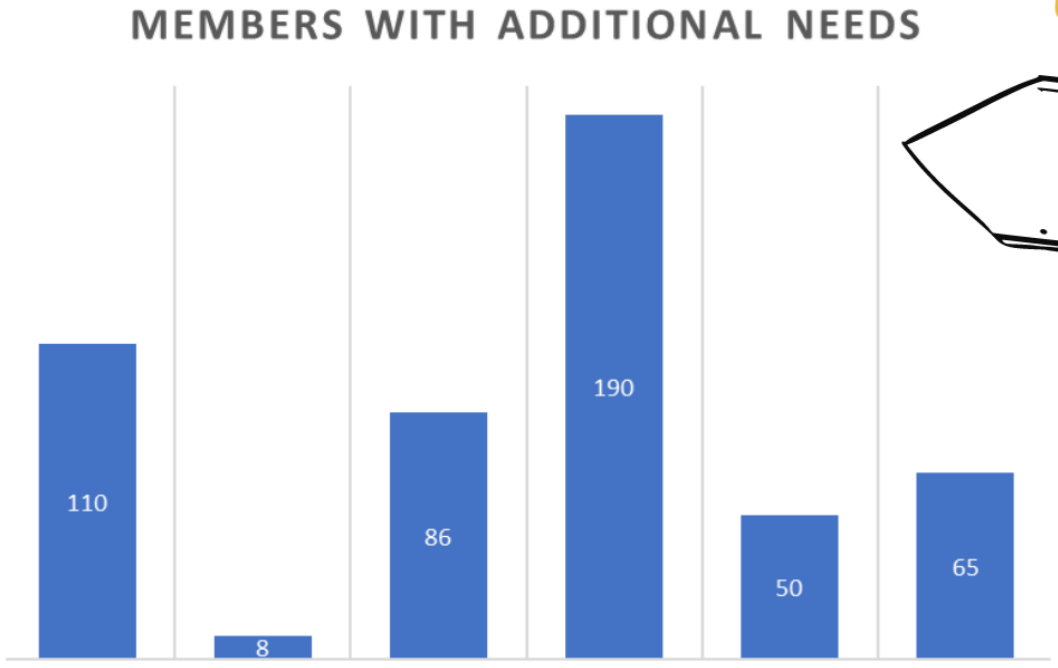
OPAL Members - Some Statistics

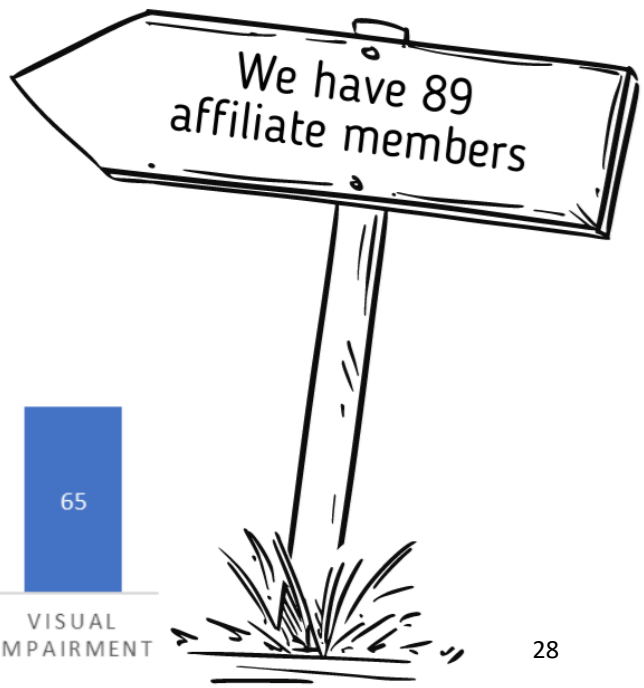












OPAL

OLDER PEOPLE'S ACTION IN THE LOCALITY

WELCOME IN Community Centre & Cafe



The Committee:

Martin Sellens, Chairman
Louise Tanner, Treasurer

Elizabeth Locke
Peter Ellis
Chris Hindle
Grace Clark
Jennifer Ward
Gary Hartley
Howard Marshall
John Sutcliffe

Advisors to Committee
Cllr Barry Anderson

Staff:

Ailsa Rhodes	CEO
Sally-Anne Notley	Deputy Manager
Shelley Clark	Project Worker
Hattie Easton	Project Worker
Lisa Wilson	Project Worker
Mandy Moran	Project Worker
Bev Fletcher	Wellbeing Coordinator
Kate Taverner	Wellbeing Coordinator
Ellen Stoker	Community Builder
Nikki Sloper	Café Manager
Gail Place	Café Worker
Natalie Gloveli	Café Worker
Jennifer Kitching	Café Worker
Steve Hogg	Digital Inclusion

Welcome In Community Centre
55 Bedford Drive
LS16 6DJ
0113 261 9103

admin@opal-project.org.uk
www.opal-project.org.uk
Twitter@OPALLeeds16
Facebook@OPALLeeds16












LET IT SNOW

























Our members, staff and volunteers



















A special thank you to OPAL members, volunteers, friends, local businesses, schools, universities and groups who have supported us by giving their time, donations, raffle prizes and discounts.

We received a total amount of **£24,205** from donations and fundraising which is a phenomenal amount of money. A big thank you to everyone who contributed to this and I am sorry that we don't have the space to list all your names.

Thank you also to our very generous funders. Without financial support from Leeds City Council, Charitable Trusts and other grant-giving agencies, OPAL would not exist.

Restricted Funds:	**Purpose of restriction**
Fund name	
BARCA	To support people in need
Co-op Local Community Fund	Towards Lunch club costs
Harrison and Potter Trust	Christmas Activities
Housing Advisory Panel	WOW group
Leeds City Council	For OPAL's work supporting older people
Leeds City Council	To deliver ABCD project
Leeds Civic Trust	Towards a community bench
Leeds Community Foundation	Towards lunch clubs
Leeds Convalescent Society	To extend assisted shopping provision
Leeds Culture Trust	For Leeds 2023
Leeds Older People's Forum	SWIFT
Leeds Older People's Forum	To deliver the Enhance project
Leeds Older People's Forum	For warm spaces
Local Care Partnership	For warm spaces
Voluntary Action Leeds HSF	Supporting people in need

In a bid to create a financially secure future, OPAL works hard to generate its own income and to develop new income streams wherever possible. We are however, still very reliant on grants and donations. We are forever grateful to those who support us and we endeavour to ensure that every penny is spent wisely and in line with our aims and objectives.

Older People's Action in the Locality

Charity number 1131792

A company limited by guarantee number 06961204

Annual Report and Financial Statements

for the year ended 31 March 2023

OPAL

OLDER PEOPLE'S
ACTION IN THE LOCALITY

COMMUNITY ACCOUNTING WYCAS

West Yorkshire Community Accounting Service

Older People's Action in the Locality

Annual Report and Financial Statements

for the year ended 31 March 2023

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Balance sheet	8
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Prepared by West Yorkshire Community Accountancy Service CIO

Older People's Action in the Locality

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
Martin Sellens	Chair	
Louise Tanner	Treasurer	
Howard Marshall		Resigned July 2023
Peter Ellis		
Grace Clark		
Gary Hartley		
Christopher Hindle		
Elizabeth Locke		
Jennifer Ward		
John Sutcliffe		

Charity number	1131792	Registered in England and Wales
Company number	06961204	Registered in England and Wales

Registered and principal address	**Bankers**	
Welcome In Community Centre	Nat West Bank	Cambridge and Counties Bank
55 Bedford Drive	491 Otley Road	Charnwood Court
Leeds	Leeds	5B New Walk
LS16 6DJ	LS16 7YB	Leicester
		LE1 6TE

Independent examiner

Simon Bostrom FCIE

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 14 July 2009. It is governed by a memorandum and articles of association as amended 18 June 2020. The liability of the members in the event of the company being wound up is limited to a sum not exceeding £1.

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.

The trustees of the charity are also the directors for the purposes of company law and are appointed by the trustees at a duly convened meeting.

Objectives and activities

The charity's objects

The objects are to further or benefit the residents of Cookridge, Holt Park, Ireland Wood, Tinshill, Adel and Bramhope (most of the Leeds 16 postcode) and surrounding areas, particularly but not exclusively for the elderly, without distinction of sex, sexual orientation, race or of political, religious or other opinions by associating together the said residents and the local authorities, voluntary and other organisations in a common effort to advance education and to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents and to strengthen the local communities in which they live.

The charity's main activities

OPAL reduces social isolation and promotes the wellbeing of older people so that they can live independently in their own homes. We do this by offering opportunities for healthy living and social activities, practical support and an information service.

OPAL is based in and manages the Welcome In Community Centre and Community Cafe. The Centre and Cafe is a facility for all the community and provides a source of revenue for OPAL as well as providing opportunity for integration of older people with the wider community.

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 the health and wellbeing of older people.

Achievements and performance

OPAL supports 650 older people offering over 20 regular activities including lunch clubs, exercise classes, assisted shopping, day trips, bereavement, carers and memory support groups. They are all very well attended and feedback from members is always fabulous. We are often told by our members that OPAL is their lifeline.

During the festive period we did a joint intergenerational project with Ralph Thoresby High School putting on a Christmas banquet for 120 OPAL members. This intergenerational event was the highlight of the year for many older people and it was great to see the students engage with people 50 to 70 yrs older than them in such a positive way.

All members aged 90yrs and over were offered a Christmas food hamper and we also provided a Christmas dinner, entertainment and gifts to 25 members who would otherwise have been on their own over the festive period.

This year we have worked with Leeds Older People’s Forum and Leeds Community Healthcare on the Enhance project to help relieve the pressure on Neighbourhood Teams. As part of this project the Health Hubs were piloted at OPAL and their success meant they have now been rolled out across the city.

Our Welcome In Café has gone from strength to strength and is a wonderful vibrant hub accessible to the whole community and providing tasty nutritious food at affordable prices. Through the winter we took part in the Leeds City Council winter coat exchange and provided warm space and food as well as delivering food parcels and shopping vouchers to individuals and families in need.

Our Community Events such as our Halloween party, Community Fun Day and Christmas Fayre have all been very popular with the whole community and help us achieve our goal of creating a community where all generations integrate and have fun together.

Financial review

The net expenditure for the year was £53,702, including net expenditure of £25,830 on unrestricted funds and net expenditure of £27,872 on restricted funds after transfers.

Reserves policy

The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the charity, which equates to between £134,667 and £235,667 based on budgeted expenditure of £404,000. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors.

The charity's free reserves, excluding fixed assets, at the year end were £215,404.

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 6 September 2023

Louise Tanner (Trustee)

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

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 7 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
Since the charitable company's gross income exceeded £250,000 your examiner must be a fellow of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a fellow of ACIE which is one of the listed bodies.

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.

Simon Bostrom FCIE

8 September 2023

West Yorkshire Community Accountancy Service CIO
Stringer House
34 Lupton Street
Leeds
LS10 2QW

Older People's Action in the Locality

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)	23,523	208,233	231,756	272,054
Fees and charges		57,576	-	57,576	48,083
Café income		42,956	-	42,956	20,179
Memberships		7,693	-	7,693	6,738
Rent and room hire		22,397	-	22,397	20,763
Fundraising		2,501	-	2,501	3,425
Bank interest		2,836	-	2,836	1,046
In kind services		-	-	-	5,348
Other income		1,105	-	1,105	6,392
Total income		160,587	208,233	368,820	384,028
Expenditure on:					
Salaries NI and pensions	(3)	84,468	145,964	230,432	201,760
Payroll costs		143	1,909	2,052	1,952
Staff travel expenses		511	787	1,298	447
Training		279	320	599	135
Volunteer expenses and training		101	488	589	290
Events and activities		43,240	36,204	79,444	40,238
Café supplies and equipment		17,130	2,923	20,053	23,643
Equipment and materials		144	2,376	2,520	2,713
Premises costs		2,416	23,023	25,439	22,123
Phone, postage and internet		393	5,282	5,675	6,128
Computers and IT		22	4,317	4,339	5,864
Printing and stationery		48	484	532	2,428
Memberships and subscriptions		1,868	2,664	4,532	3,535
Insurance		-	4,989	4,989	4,891
Hospitality and sundry costs		185	106	291	384
Governance costs		37	287	324	273
Independent examination		56	1,393	1,449	1,380
Legal and professional		-	-	-	500
Repairs and maintenance		1,492	2,589	4,081	7,628
In kind services - landscaping works		-	-	-	5,348
Depreciation		32,663	-	32,663	32,440
Loan interest		1,221	-	1,221	1,365
Total expenditure		186,417	236,105	422,522	365,465
Net income / (expenditure)		(25,830)	(27,872)	(53,702)	18,563
Fund balances brought forward		786,594	62,508	849,102	830,539
Fund balances carried forward	(4)	760,764	34,636	795,400	849,102

All incoming resources and resources expended derive from continuing activities.

Older People's Action in the Locality

Balance sheet

as at 31 March 2023

		2023 Unrestricted £	2023 Restricted £	2023 Total £	2022 Total £
Fixed assets					
Tangible assets	(5)	545,360	-	545,360	575,222
Total fixed assets		545,360	-	545,360	575,222
Current assets					
Debtors and prepayments	(6)	8,092	-	8,092	11,197
Current asset investments	(7)	105,930	-	105,930	103,759
Cash at bank and in hand	(8)	107,340	55,476	162,816	189,377
Total current assets		221,362	55,476	276,838	304,333
Current liabilities: amounts falling due within one year					
Creditors and accruals	(9)	5,958	20,840	26,798	7,984
Total current liabilities		5,958	20,840	26,798	7,984
Net current assets / (liabilities)		215,404	34,636	250,040	296,349
Total assets less current liabilities		760,764	34,636	795,400	871,571
Creditors: amounts falling due after one year	(10)	-	-	-	22,469
Net assets		760,764	34,636	795,400	849,102
Funds					
Unrestricted funds		760,764	-	760,764	786,594
Restricted funds		-	34,636	34,636	62,508
Total funds		760,764	34,636	795,400	849,102

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 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 6 September 2023

Louise Tanner (Trustee)

Older People's Action in the Locality

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, 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.
Donated goods for resale are valued at the amount actually realised upon their sale.
Donated assets, facilities or services are valued at their estimated value to the charity. This is the price that the charity estimates it would pay in the open market for equivalent items; or services and facilities of equivalent utility to the charity.

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.

Tangible fixed assets

Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition. Gifted assets are shown at the value to the charity on receipt.

Depreciation is provided on all tangible fixed assets at rates calculated to write off the cost on a straight line basis over their expected useful economic lives as follows:

Fixtures and equipment: over 5 years
Leasehold improvements: over the life of the lease

1 Accounting policies continued

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.

Leases
Rents under operating leases are charged on a straight line basis over the lease term or to an earlier date if the lease can be determined without financial penalty.

2 Grants and donations

	2023 Unrestricted funds £	2023 Restricted funds £	2023 Total funds £	2022 Total funds £
Barca	-	1,500	1,500	-
Leeds Community Foundation (LCF)	-	8,588	8,588	-
Co-op Local Community Fund	-	3,854	3,854	-
Harrison and Potter Trust	-	5,530	5,530	7,777
Leeds City Council (LCC)	-	119,136	119,136	203,126
Leeds Civic Trust	-	450	450	-
Leeds Convalescent Society	-	500	500	-
Leeds Culture Trust	-	400	400	-
Leeds Older Peoples Forum (LOPF)	-	51,400	51,400	1,550
Local Care Partnership (LCP)	-	3,125	3,125	-
Voluntary Action Leeds	-	13,750	13,750	1,000
Leeds Community Foundation	-	-	-	7,821
Power to Change	-	-	-	20,000
Wades Charity	-	-	-	3,120
Other grants and donations (including gift aid)	23,523	-	23,523	27,660
	23,523	208,233	231,756	272,054

3 Staff costs and numbers

	2023 £	2022 £
Gross salaries	214,332	188,976
Social security costs	14,986	11,994
Employment allowance	(5,000)	(4,000)
Pensions	6,114	4,790
	230,432	201,760

The average number of employees during the year was 12.5, being an average of 8.4 full time equivalent (2022: 11.9, 8 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	6,114	4,790
Amount of any contributions outstanding at the year end	-	-

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2023

4 **Restricted funds**	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
Barca	-	1,500	1,500	-	-
Jimbo's Fund Carers	3,700	-	3,700	-	-
Jimbo's Fund Mens Group	946	-	946	-	-
Local Care Partnership (LCP)	-	3,125	982	-	2,143
LCF Lunch clubs	-	3,488	3,488	-	-
Co-op Local Community Fund	-	3,854	3,854	-	-
LOPF Enhance	-	50,400	44,779	-	5,621
LCC Housing Advisory Panel	-	990	465	-	525
Harrison and Potter	-	5,530	3,415	-	2,115
Harrison and Potter	4,609	-	4,609	-	-
VAL Household support	-	11,250	11,250	-	-
LCC Covid £48k	1,810	-	1,810	-	-
LCC ASC grant	2,875	80,646	82,013	-	1,508
LCC ABCD	31,524	25,000	35,106	-	21,418
LCC Care support	1,000	-	1,000	-	-
LCC Small Sparks Fund	600	-	144	-	456
Leeds Bereavement Forum	160	-	160	-	-
Leeds Civic Trust	-	450	-	-	450
Leeds Convalescent Society	-	500	100	-	400
Leeds Culture Trust	-	400	400	-	-
SWIFT	12,289	12,500	24,789	-	-
Wades Friday Social	2,995	-	2,995	-	-
LCF Winter Warmer funding	-	5,100	5,100	-	-
LOPF Warm spaces	-	1,000	1,000	-	-
VAL Warm spaces	-	2,500	2,500	-	-
	62,508	208,233	236,105	-	34,636

Fund name	**Purpose of restriction**
Barca	Towards supporting people in need
Jimbo's Fund Carers	To fund Carers and Cared for group
Jimbo's Fund Mens Group	Jimbo's Fund To support the Men's Group
Local Care Partnership (LCP)	Towards the cost of providing warm spaces
LCF Lunch clubs	Towards the luncheon club costs
Co-op Local Community Fund	Towards the luncheon club costs
LOPF Enhance	For support with hospital discharge and prevent hospital admission
LCC Housing Advisory Panel	Towards peer support group costs addressing mental health problems
Harrison and Potter	Towards a Christmas dinner, hampers and assisted shopping trips
Harrison and Potter	To fund exercise classes
VAL Household support	Towards supporting people in need
LCC Covid £48k	Towards Covid relief support
LCC ASC grant	For OPAL's work supporting older people
LCC ABCD	To deliver the ABCD project
LCC Care support	To be available to support care agencies
LCC Small Sparks Fund	To distribute to community members for community development work
Leeds Bereavement Forum	Dying matters event
Leeds Civic Trust	Towards a community bench
Leeds Convalescent Society	To extend the provision assisted shopping
Leeds Culture Trust	Towards the 2023 Community Anchor
SWIFT	Funding from Public Health to support frail older people
Wades Friday Social	To fund chair exercise classes
LCF Winter Warmer funding	Towards the cost of providing warm spaces
LOPF Warm spaces	Towards the cost of providing warm spaces
VAL Warm spaces	Towards the cost of providing warm spaces

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2023

5 Tangible assets	Leasehold property	Fixtures and equipment	Total
Cost	£	£	£
At 1 April 2022	692,233	26,312	718,545
Additions	-	2,801	2,801
At 31 March 2023	692,233	29,113	721,346
Depreciation			
At 1 April 2022	128,235	15,088	143,323
Charge for year	28,226	4,437	32,663
At 31 March 2023	156,461	19,525	175,986
Net book value			
At 31 March 2023	535,772	9,588	545,360
At 31 March 2022	563,998	11,224	575,222

6 Debtors and prepayments	2023	2022
	£	£
Prepayments	1,567	1,329
Accrued income	6,525	9,868
	8,092	11,197

7 Current asset investments	2023	2022
	£	£
Cash equivalents on deposit	105,930	103,759
	105,930	103,759

8 Cash at bank and in hand	2023	2022
	£	£
Cash at bank	162,615	189,168
Cash in hand	201	209
	162,816	189,377

9 Creditors and accruals	2023	2022
	£	£
Bank loans and overdrafts	-	5,185
Creditors	4,509	1,419
Amounts received on account for contracts / performance related grants	20,840	-
Accruals	1,449	1,380
	26,798	7,984

10 Creditors: amounts falling due after one year

	2023	2022
	£	£
Bank loans	-	22,469
	-	22,469

11 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 £74,046 (previous year: £67,266).

12 Operating leases

Expected future minimum lease payments over the remaining life of the lease, analysed into the period in which the commitment falls due:	2023	2022
	£	£
Within one year	132	132
In the second to fifth years inclusive	528	528
Over five years from the balance sheet date	1,870	2,002
	2,530	2,662

Older People's Action in the Locality

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	23,523	27,460	208,233	244,594	231,756	272,054
Fees and charges	57,576	48,083	-	-	57,576	48,083
Café income	42,956	20,179	-	-	42,956	20,179
Memberships	7,693	6,738	-	-	7,693	6,738
Rent and room hire	22,397	20,763	-	-	22,397	20,763
Fundraising	2,501	3,425	-	-	2,501	3,425
Bank interest	2,836	1,046	-	-	2,836	1,046
In kind services	-	5,348	-		-	5,348
Other income	1,105	6,392	-		1,105	6,392
Total income	160,587	139,434	208,233	244,594	368,820	384,028
Expenditure						
Salaries NI and pensions	84,468	24,691	145,964	177,069	230,432	201,760
Payroll costs	143	-	1,909	1,952	2,052	1,952
Staff travel expenses	511	44	787	403	1,298	447
Training	279	-	320	135	599	135
Volunteer expenses and training	101	-	488	290	589	290
Events and activities	43,240	10,623	36,204	29,615	79,444	40,238
Café supplies and equipment	17,130	14,046	2,923	9,597	20,053	23,643
Equipment and materials	144	95	2,376	2,618	2,520	2,713
Premises costs	2,416	1,624	23,023	20,499	25,439	22,123
Phone, postage and internet	393	-	5,282	6,128	5,675	6,128
Computers and IT	22	-	4,317	5,864	4,339	5,864
Printing and stationery	48	91	484	2,337	532	2,428
Memberships and subscriptions	1,868	520	2,664	3,015	4,532	3,535
Insurance	-	-	4,989	4,891	4,989	4,891
Hospitality and sundry costs	185	53	106	331	291	384
Governance costs	37	57	287	216	324	273
Independent examination	56	-	1,393	1,380	1,449	1,380
Legal and professional	-	-	-	500	-	500
Repairs and maintenance	1,492	1,184	2,589	6,444	4,081	7,628
In kind services - landscaping works	-	5,348	-	-	-	5,348
Depreciation	32,663	32,440	-	-	32,663	32,440
Loan interest	1,221	1,365	-	-	1,221	1,365
Total expenditure	186,417	92,181	236,105	273,284	422,522	365,465
Net income / (expenditure)	(25,830)	47,253	(27,872)	(28,690)	(53,702)	18,563
Transfers between funds	-	1,234	-	(1,234)	-	-
Net movement in funds	(25,830)	48,487	(27,872)	(29,924)	(53,702)	18,563
Fund balances brought forward	786,594	738,107	62,508	92,432	849,102	830,539
Fund balances carried forward	760,764	786,594	34,636	62,508	795,400	849,102

Older People's Action in the Locality

Charity number 1131792

A company limited by guarantee number 06961204

Annual Report and Financial Statements

for the year ended 31 March 2023

OPAL

OLDER PEOPLE'S
ACTION IN THE LOCALITY

COMMUNITY ACCOUNTING WYCAS

West Yorkshire Community Accounting Service

Older People's Action in the Locality

Annual Report and Financial Statements

for the year ended 31 March 2023

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Prepared by West Yorkshire Community Accountancy Service CIO

Older People's Action in the Locality

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
Martin Sellens	Chair	
Louise Tanner	Treasurer	
Howard Marshall		Resigned July 2023
Peter Ellis		
Grace Clark		
Gary Hartley		
Christopher Hindle		
Elizabeth Locke		
Jennifer Ward		
John Sutcliffe		

Charity number	1131792	Registered in England and Wales
Company number	06961204	Registered in England and Wales

Registered and principal address	**Bankers**	
Welcome In Community Centre	Nat West Bank	Cambridge and Counties Bank
55 Bedford Drive	491 Otley Road	Charnwood Court
Leeds	Leeds	5B New Walk
LS16 6DJ	LS16 7YB	Leicester
		LE1 6TE

Independent examiner

Simon Bostrom FCIE

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 14 July 2009. It is governed by a memorandum and articles of association as amended 18 June 2020. The liability of the members in the event of the company being wound up is limited to a sum not exceeding £1.

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.

The trustees of the charity are also the directors for the purposes of company law and are appointed by the trustees at a duly convened meeting.

Objectives and activities

The charity's objects

The objects are to further or benefit the residents of Cookridge, Holt Park, Ireland Wood, Tinshill, Adel and Bramhope (most of the Leeds 16 postcode) and surrounding areas, particularly but not exclusively for the elderly, without distinction of sex, sexual orientation, race or of political, religious or other opinions by associating together the said residents and the local authorities, voluntary and other organisations in a common effort to advance education and to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents and to strengthen the local communities in which they live.

The charity's main activities

OPAL reduces social isolation and promotes the wellbeing of older people so that they can live independently in their own homes. We do this by offering opportunities for healthy living and social activities, practical support and an information service.

OPAL is based in and manages the Welcome In Community Centre and Community Cafe. The Centre and Cafe is a facility for all the community and provides a source of revenue for OPAL as well as providing opportunity for integration of older people with the wider community.

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 the health and wellbeing of older people.

Achievements and performance

OPAL supports 650 older people offering over 20 regular activities including lunch clubs, exercise classes, assisted shopping, day trips, bereavement, carers and memory support groups. They are all very well attended and feedback from members is always fabulous. We are often told by our members that OPAL is their lifeline.

During the festive period we did a joint intergenerational project with Ralph Thoresby High School putting on a Christmas banquet for 120 OPAL members. This intergenerational event was the highlight of the year for many older people and it was great to see the students engage with people 50 to 70 yrs older than them in such a positive way.

All members aged 90yrs and over were offered a Christmas food hamper and we also provided a Christmas dinner, entertainment and gifts to 25 members who would otherwise have been on their own over the festive period.

This year we have worked with Leeds Older People’s Forum and Leeds Community Healthcare on the Enhance project to help relieve the pressure on Neighbourhood Teams. As part of this project the Health Hubs were piloted at OPAL and their success meant they have now been rolled out across the city.

Our Welcome In Café has gone from strength to strength and is a wonderful vibrant hub accessible to the whole community and providing tasty nutritious food at affordable prices. Through the winter we took part in the Leeds City Council winter coat exchange and provided warm space and food as well as delivering food parcels and shopping vouchers to individuals and families in need.

Our Community Events such as our Halloween party, Community Fun Day and Christmas Fayre have all been very popular with the whole community and help us achieve our goal of creating a community where all generations integrate and have fun together.

Financial review

The net expenditure for the year was £53,702, including net expenditure of £25,830 on unrestricted funds and net expenditure of £27,872 on restricted funds after transfers.

Reserves policy

The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the charity, which equates to between £134,667 and £235,667 based on budgeted expenditure of £404,000. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors.

The charity's free reserves, excluding fixed assets, at the year end were £215,404.

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 6 September 2023

Louise Tanner (Trustee)

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

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 7 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
Since the charitable company's gross income exceeded £250,000 your examiner must be a fellow of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a fellow of ACIE which is one of the listed bodies.

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.

Simon Bostrom FCIE

8 September 2023

West Yorkshire Community Accountancy Service CIO
Stringer House
34 Lupton Street
Leeds
LS10 2QW

Older People's Action in the Locality

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)	23,523	208,233	231,756	272,054
Fees and charges		57,576	-	57,576	48,083
Café income		42,956	-	42,956	20,179
Memberships		7,693	-	7,693	6,738
Rent and room hire		22,397	-	22,397	20,763
Fundraising		2,501	-	2,501	3,425
Bank interest		2,836	-	2,836	1,046
In kind services		-	-	-	5,348
Other income		1,105	-	1,105	6,392
Total income		160,587	208,233	368,820	384,028
Expenditure on:					
Salaries NI and pensions	(3)	84,468	145,964	230,432	201,760
Payroll costs		143	1,909	2,052	1,952
Staff travel expenses		511	787	1,298	447
Training		279	320	599	135
Volunteer expenses and training		101	488	589	290
Events and activities		43,240	36,204	79,444	40,238
Café supplies and equipment		17,130	2,923	20,053	23,643
Equipment and materials		144	2,376	2,520	2,713
Premises costs		2,416	23,023	25,439	22,123
Phone, postage and internet		393	5,282	5,675	6,128
Computers and IT		22	4,317	4,339	5,864
Printing and stationery		48	484	532	2,428
Memberships and subscriptions		1,868	2,664	4,532	3,535
Insurance		-	4,989	4,989	4,891
Hospitality and sundry costs		185	106	291	384
Governance costs		37	287	324	273
Independent examination		56	1,393	1,449	1,380
Legal and professional		-	-	-	500
Repairs and maintenance		1,492	2,589	4,081	7,628
In kind services - landscaping works		-	-	-	5,348
Depreciation		32,663	-	32,663	32,440
Loan interest		1,221	-	1,221	1,365
Total expenditure		186,417	236,105	422,522	365,465
Net income / (expenditure)		(25,830)	(27,872)	(53,702)	18,563
Fund balances brought forward		786,594	62,508	849,102	830,539
Fund balances carried forward	(4)	760,764	34,636	795,400	849,102

All incoming resources and resources expended derive from continuing activities.

Older People's Action in the Locality

Balance sheet

as at 31 March 2023

		2023 Unrestricted £	2023 Restricted £	2023 Total £	2022 Total £
Fixed assets					
Tangible assets	(5)	545,360	-	545,360	575,222
Total fixed assets		545,360	-	545,360	575,222
Current assets					
Debtors and prepayments	(6)	8,092	-	8,092	11,197
Current asset investments	(7)	105,930	-	105,930	103,759
Cash at bank and in hand	(8)	107,340	55,476	162,816	189,377
Total current assets		221,362	55,476	276,838	304,333
Current liabilities: amounts falling due within one year					
Creditors and accruals	(9)	5,958	20,840	26,798	7,984
Total current liabilities		5,958	20,840	26,798	7,984
Net current assets / (liabilities)		215,404	34,636	250,040	296,349
Total assets less current liabilities		760,764	34,636	795,400	871,571
Creditors: amounts falling due after one year	(10)	-	-	-	22,469
Net assets		760,764	34,636	795,400	849,102
Funds					
Unrestricted funds		760,764	-	760,764	786,594
Restricted funds		-	34,636	34,636	62,508
Total funds		760,764	34,636	795,400	849,102

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 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 6 September 2023

Louise Tanner (Trustee)

Older People's Action in the Locality

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, 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.
Donated goods for resale are valued at the amount actually realised upon their sale.
Donated assets, facilities or services are valued at their estimated value to the charity. This is the price that the charity estimates it would pay in the open market for equivalent items; or services and facilities of equivalent utility to the charity.

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.

Tangible fixed assets

Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition. Gifted assets are shown at the value to the charity on receipt.

Depreciation is provided on all tangible fixed assets at rates calculated to write off the cost on a straight line basis over their expected useful economic lives as follows:

Fixtures and equipment: over 5 years
Leasehold improvements: over the life of the lease

1 Accounting policies continued

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.

Leases
Rents under operating leases are charged on a straight line basis over the lease term or to an earlier date if the lease can be determined without financial penalty.

2 Grants and donations

	2023 Unrestricted funds £	2023 Restricted funds £	2023 Total funds £	2022 Total funds £
Barca	-	1,500	1,500	-
Leeds Community Foundation (LCF)	-	8,588	8,588	-
Co-op Local Community Fund	-	3,854	3,854	-
Harrison and Potter Trust	-	5,530	5,530	7,777
Leeds City Council (LCC)	-	119,136	119,136	203,126
Leeds Civic Trust	-	450	450	-
Leeds Convalescent Society	-	500	500	-
Leeds Culture Trust	-	400	400	-
Leeds Older Peoples Forum (LOPF)	-	51,400	51,400	1,550
Local Care Partnership (LCP)	-	3,125	3,125	-
Voluntary Action Leeds	-	13,750	13,750	1,000
Leeds Community Foundation	-	-	-	7,821
Power to Change	-	-	-	20,000
Wades Charity	-	-	-	3,120
Other grants and donations (including gift aid)	23,523	-	23,523	27,660
	23,523	208,233	231,756	272,054

3 Staff costs and numbers

	2023 £	2022 £
Gross salaries	214,332	188,976
Social security costs	14,986	11,994
Employment allowance	(5,000)	(4,000)
Pensions	6,114	4,790
	230,432	201,760

The average number of employees during the year was 12.5, being an average of 8.4 full time equivalent (2022: 11.9, 8 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	6,114	4,790
Amount of any contributions outstanding at the year end	-	-

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2023

4 **Restricted funds**	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
Barca	-	1,500	1,500	-	-
Jimbo's Fund Carers	3,700	-	3,700	-	-
Jimbo's Fund Mens Group	946	-	946	-	-
Local Care Partnership (LCP)	-	3,125	982	-	2,143
LCF Lunch clubs	-	3,488	3,488	-	-
Co-op Local Community Fund	-	3,854	3,854	-	-
LOPF Enhance	-	50,400	44,779	-	5,621
LCC Housing Advisory Panel	-	990	465	-	525
Harrison and Potter	-	5,530	3,415	-	2,115
Harrison and Potter	4,609	-	4,609	-	-
VAL Household support	-	11,250	11,250	-	-
LCC Covid £48k	1,810	-	1,810	-	-
LCC ASC grant	2,875	80,646	82,013	-	1,508
LCC ABCD	31,524	25,000	35,106	-	21,418
LCC Care support	1,000	-	1,000	-	-
LCC Small Sparks Fund	600	-	144	-	456
Leeds Bereavement Forum	160	-	160	-	-
Leeds Civic Trust	-	450	-	-	450
Leeds Convalescent Society	-	500	100	-	400
Leeds Culture Trust	-	400	400	-	-
SWIFT	12,289	12,500	24,789	-	-
Wades Friday Social	2,995	-	2,995	-	-
LCF Winter Warmer funding	-	5,100	5,100	-	-
LOPF Warm spaces	-	1,000	1,000	-	-
VAL Warm spaces	-	2,500	2,500	-	-
	62,508	208,233	236,105	-	34,636

Fund name	**Purpose of restriction**
Barca	Towards supporting people in need
Jimbo's Fund Carers	To fund Carers and Cared for group
Jimbo's Fund Mens Group	Jimbo's Fund To support the Men's Group
Local Care Partnership (LCP)	Towards the cost of providing warm spaces
LCF Lunch clubs	Towards the luncheon club costs
Co-op Local Community Fund	Towards the luncheon club costs
LOPF Enhance	For support with hospital discharge and prevent hospital admission
LCC Housing Advisory Panel	Towards peer support group costs addressing mental health problems
Harrison and Potter	Towards a Christmas dinner, hampers and assisted shopping trips
Harrison and Potter	To fund exercise classes
VAL Household support	Towards supporting people in need
LCC Covid £48k	Towards Covid relief support
LCC ASC grant	For OPAL's work supporting older people
LCC ABCD	To deliver the ABCD project
LCC Care support	To be available to support care agencies
LCC Small Sparks Fund	To distribute to community members for community development work
Leeds Bereavement Forum	Dying matters event
Leeds Civic Trust	Towards a community bench
Leeds Convalescent Society	To extend the provision assisted shopping
Leeds Culture Trust	Towards the 2023 Community Anchor
SWIFT	Funding from Public Health to support frail older people
Wades Friday Social	To fund chair exercise classes
LCF Winter Warmer funding	Towards the cost of providing warm spaces
LOPF Warm spaces	Towards the cost of providing warm spaces
VAL Warm spaces	Towards the cost of providing warm spaces

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2023

5 Tangible assets	Leasehold property	Fixtures and equipment	Total
Cost	£	£	£
At 1 April 2022	692,233	26,312	718,545
Additions	-	2,801	2,801
At 31 March 2023	692,233	29,113	721,346
Depreciation			
At 1 April 2022	128,235	15,088	143,323
Charge for year	28,226	4,437	32,663
At 31 March 2023	156,461	19,525	175,986
Net book value			
At 31 March 2023	535,772	9,588	545,360
At 31 March 2022	563,998	11,224	575,222

6 Debtors and prepayments	2023	2022
	£	£
Prepayments	1,567	1,329
Accrued income	6,525	9,868
	8,092	11,197

7 Current asset investments	2023	2022
	£	£
Cash equivalents on deposit	105,930	103,759
	105,930	103,759

8 Cash at bank and in hand	2023	2022
	£	£
Cash at bank	162,615	189,168
Cash in hand	201	209
	162,816	189,377

9 Creditors and accruals	2023	2022
	£	£
Bank loans and overdrafts	-	5,185
Creditors	4,509	1,419
Amounts received on account for contracts / performance related grants	20,840	-
Accruals	1,449	1,380
	26,798	7,984

10 Creditors: amounts falling due after one year

	2023	2022
	£	£
Bank loans	-	22,469
	-	22,469

11 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 £74,046 (previous year: £67,266).

12 Operating leases

Expected future minimum lease payments over the remaining life of the lease, analysed into the period in which the commitment falls due:	2023	2022
	£	£
Within one year	132	132
In the second to fifth years inclusive	528	528
Over five years from the balance sheet date	1,870	2,002
	2,530	2,662

Older People's Action in the Locality

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	23,523	27,460	208,233	244,594	231,756	272,054
Fees and charges	57,576	48,083	-	-	57,576	48,083
Café income	42,956	20,179	-	-	42,956	20,179
Memberships	7,693	6,738	-	-	7,693	6,738
Rent and room hire	22,397	20,763	-	-	22,397	20,763
Fundraising	2,501	3,425	-	-	2,501	3,425
Bank interest	2,836	1,046	-	-	2,836	1,046
In kind services	-	5,348	-		-	5,348
Other income	1,105	6,392	-		1,105	6,392
Total income	160,587	139,434	208,233	244,594	368,820	384,028
Expenditure						
Salaries NI and pensions	84,468	24,691	145,964	177,069	230,432	201,760
Payroll costs	143	-	1,909	1,952	2,052	1,952
Staff travel expenses	511	44	787	403	1,298	447
Training	279	-	320	135	599	135
Volunteer expenses and training	101	-	488	290	589	290
Events and activities	43,240	10,623	36,204	29,615	79,444	40,238
Café supplies and equipment	17,130	14,046	2,923	9,597	20,053	23,643
Equipment and materials	144	95	2,376	2,618	2,520	2,713
Premises costs	2,416	1,624	23,023	20,499	25,439	22,123
Phone, postage and internet	393	-	5,282	6,128	5,675	6,128
Computers and IT	22	-	4,317	5,864	4,339	5,864
Printing and stationery	48	91	484	2,337	532	2,428
Memberships and subscriptions	1,868	520	2,664	3,015	4,532	3,535
Insurance	-	-	4,989	4,891	4,989	4,891
Hospitality and sundry costs	185	53	106	331	291	384
Governance costs	37	57	287	216	324	273
Independent examination	56	-	1,393	1,380	1,449	1,380
Legal and professional	-	-	-	500	-	500
Repairs and maintenance	1,492	1,184	2,589	6,444	4,081	7,628
In kind services - landscaping works	-	5,348	-	-	-	5,348
Depreciation	32,663	32,440	-	-	32,663	32,440
Loan interest	1,221	1,365	-	-	1,221	1,365
Total expenditure	186,417	92,181	236,105	273,284	422,522	365,465
Net income / (expenditure)	(25,830)	47,253	(27,872)	(28,690)	(53,702)	18,563
Transfers between funds	-	1,234	-	(1,234)	-	-
Net movement in funds	(25,830)	48,487	(27,872)	(29,924)	(53,702)	18,563
Fund balances brought forward	786,594	738,107	62,508	92,432	849,102	830,539
Fund balances carried forward	760,764	786,594	34,636	62,508	795,400	849,102

OLDER PEOPLE'S ACTION IN THE LOCALITY

England & Wales - Charity number 1131792

Accounts

The Queen's Award for Voluntary Service

The MBE for volunteer groups

OPAL

OLDER PEOPLE'S ACTION IN THE LOCALITY

Reducing isolation and improving the quality of life for older people



Annual Report

1st April 2021 - 31st March 2022

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Welcome to our Annual Report

Covid -19 Response

It is difficult to look back over the 2021 to 2022 period without examining the effect that Covid -19 has had, not just on the Centre but in the community at large.

It has been a deeply worrying time for us all. Looking back there were periods of adversity but also positives in the way communities came together. OPAL and the Welcome In are proud of the services we were able to offer as a Community Hub

OPAL was able to react quickly and effectively to the ever-changing requirements made necessary by Covid. While some other organisations had to close, our infrastructure and vision enabled us to continue working to support not just our members but the community as a whole, meeting government and local guidelines as they changed. We were usually able to change to meet guidelines within a 24-48 hour period ensuring that our services continued with very little or no interruption.

An area we were all proud of was the meal delivery service. When OPAL was no longer able to offer meals at our premises we shifted to meal deliveries. We were regularly providing over 100 meals a week to those OPAL members and some members of the community who had difficulty preparing a well-balanced nutritional meal. We had the facility, resources and most importantly a fantastic volunteer network which reliably delivered the food in all weather conditions. There were times when we had to swap between lunches starting back at the centre and then shifting back to deliveries.



Covid -19 Response Continued

The Covid-19 services were not limited to providing meals, we continued to provide the following services for our members and the local community:

- We partnered with the local government and became a Covid Hub for the Leeds 16 area.
- One of the very first things we did was to set up a Phone Buddy system that was offered to over 700 members and isolated people in the community. Its focus to ensure that people had weekly social contact and someone to check in with them. This was not only hugely successful but real bonds of friendship have been formed, and which continue to this day. We had amazing support from lots of our volunteers and community volunteers who came forward to support during Covid.
- We provided a shopping service, prescription collection and transport to essential hospital appointments. The shopping buddy system matched individuals with volunteers to provide for their shopping requirements. This continued even after the restrictions were lifted as it was recognised that our members still had a need as they adjusted to the easing of restrictions.

As the restriction began to slowly lift we reacted accordingly and set up door step visits, stroll buddies and support groups when they were able to recommence. Mobility and fitness for older people was adversely affected and we were keen to promote stroll buddying as well sessions such as Chair exercise and Tai chi all in accordance with government guidelines.

As Restrictions began to lift the centre not only provided face to face social gatherings but still included those that wanted to join on zoom through digital equipment.

As I write this opening piece to the end of year report, it is safe to say that Covid-19 will be in our thoughts for some time to come. I want to take this opportunity to thank all those magnificent people that have contributed and will continue to contribute to banish this awful virus. My thanks to all the OPAL staff, volunteers and members that have helped keep our community services going in our time of need.

Chairman's Report



As we look back on another eventful year at OPAL it is right to reflect on the progress we have made since the Charity was first established 20 years ago. From small beginnings the work amongst older people in Leeds 16 has grown significantly and OPAL has established itself as a vital, thriving organisation in the community - especially since our move to the Welcome In in early 2017. Substantial investment in the building has enabled us to widen our activities and facilities and offer local people and organisations the opportunity to hire out space. The progress over the years and especially the contribution made by OPAL to supporting local people through Covid received due recognition with the awarding of an MBE to Ailsa in The Queen's Birthday honours list in this special Platinum Jubilee Year. She certainly deserves it having led OPAL so well over the past 18 years, but she would be the first to recognise that it is truly a "team" effort involving trustees, staff and volunteers – not forgetting the many who use and benefit from our services and activities. Thank you to all of you.

A further boost recently has been the news that after years trying (and I do mean years!) the City Council have now finally agreed to extend our lease of the building at the Welcome In from 22 to 50 years. This gives us long term stability.

The last financial year has been marked by the opening up of the building and our activities as we have come out of Covid. The café reopened in July 2021 after a revamp with extended hours and a new menu, which has been appreciated by so many, and business has picked up over the months since then. Other activities and services also restarted including the Drop-in, Coffee afternoons and Day trips, and over the course of the year new events have been started and trialled. The Wednesday Lunch Club moved to the High Farm at Holt Park in early 2022 and has proved popular with many. A 4 week Healthy Holidays programme was run in the summer holidays for children in association with St Paul's Church. Notable events included the Community Fun Day in September, Christmas Fayre and the Christmas Banquet at Ralph Thoresby School.

Chairman Continued



We were able to retarmac a significant part of the car park in October, and are grateful to Engie and Gem who carried out some substantial earth movement for us within the grounds at the back of the building.

In terms of staffing Hattie Easton (Covid response), Kate Taverner (SWIFt project) and Natalie Gloveli (Café) joined the team during the year. Peter Ellis stepped down as Chair of Trustees in October – we thank him for his contribution as Chair over the past few years and are pleased that he remains on the Management Board as a trustee. Louise Tanner and John Sutcliffe have joined us as Trustees in the year – it is good to have them on board and we are grateful to them for their willingness to serve in this way.

There is no doubt that our services and activities are highly valued both by the older people we support and the wider community. Looking forward there are challenges – particularly against the backdrop of the cost of living crisis, rising inflation and a likely recession. The greatest challenge perhaps is in the area of funding. The additional funding we received acting as a Covid Hub in Leeds 16 ceased in 2022. A significant number of staff contracts are due to end in March 2023 and we are not guaranteed at this stage the core funding that we need to run OPAL in 2023/4. We have estimated it costs us about £30,000 a month to run the Welcome In taking into account our staffing, running the building and our activities. That said we have previously secured substantial funding to transform the Welcome In and expand our core activities and we know that we have substantial support in the city and amongst funders. So we shall continue with the vital and important work that we do for as long as we are able.

Martin Sellens

Chair of Trustees.

Welcome to OPAL from the CEO



Our aim is to ensure that each and every older person in Leeds 16 has access to OPAL and that they are supported in the best way for them. I am very proud to be the CEO of OPAL and all that OPAL represents.

We have a fabulous team of Trustees who meet every 6 weeks to review OPAL's performance, making strategic decisions for our future and ensuring we are meeting our aims and objectives - reducing social isolation and loneliness for older people. I am grateful to the Board of Trustees for their unerring support and for the extra time they give volunteering with the day to day operations of OPAL and the Welcome In Centre.

Our army of volunteers are representative of the whole community with many being OPAL members as well. They are involved at every level of OPAL and I am forever grateful to each and every one of our volunteers for all the time, knowledge and expertise they give so willingly. We encourage and welcome volunteers to give us feedback and have a fixed agenda item in our management meeting - feedback from volunteers is highly valued. Volunteers have always been and continue to be, the life blood of OPAL.

In the last 3 years, the OPAL staff team has expanded by more than 50% - from 8 staff members to 13. This is reflective of the increased workload and the development of the Welcome In Centre and Café. The changes in personnel, the vastly changed work practices through covid and lock downs, the increased level of need within our community and the ever present concern about future funding and job security have made for, at times, a very challenging work environment. The staff team have faced these challenges with compassion, resilience, good humour and always with a 'can do' attitude. I may be biased but I think the OPAL staff team are the absolute best!

I would also like to highlight the enormous support of the Leeds 16 community for OPAL, particularly when we made the bold move in 2016 to transform a rundown pub into a community centre and to take a more community focused approach to supporting older people. Individuals, groups and local businesses have generously contributed time, money and expertise to help us achieve our goal. The result being that the centre is used by a range of groups and agencies for the benefit of the whole community.

OPAL wouldn't exist without our members. OPAL members are aged 60yrs+ and live in Leeds16 (above the ring road). We also have affiliate members - people under the aged of 60yrs and/or living outside our geographical boundaries. Some members are very engaged with our activities & services and we see them almost daily whilst others prefer to be OPAL members just in case they need our support in the future. Our members are made up of all personalities and living in the most diverse circumstances. Some live quite comfortably whilst others live with significant health, financial or social challenges. OPAL is a big melting pot and I get great joy from seeing members renewing past friendships, making new friends and generally helping and supporting one another. I am grateful to our members for their continued support of OPAL and of each other.



More than anything, I love to see people's lives transformed for the better. There are so many people that help make this happen and I thank every single one of them for their invaluable contribution.

OPAL has become so much more than a service providing social opportunities for local older people. We are a community anchor for the Leeds 16 community and we have used an Asset Based Community Development (ABCD) approach to build on the strengths already in our community. Our SWIFT project has supported some of the more frail, vulnerable older people in our community helping them to live as independently as possible. The OPAL map on page 10 and 11 gives you a visual overview of how it all fits together.

My ambition for OPAL is that we have a secure long term future and we reach and improve the lives of increased numbers of older people who want our support. OPAL has survived and thrived under some significant challenges and the current living crisis presents one more challenge for us to face. We are doing all that we can to ensure we can continue to provide the support that is needed and we are making plans to ensure we can provide a warm safe space for people through the cold winter months. If you are in a position to help us either financially or by giving your time and expertise, please do get in touch. This next year could well be our biggest challenge yet!

Thank you

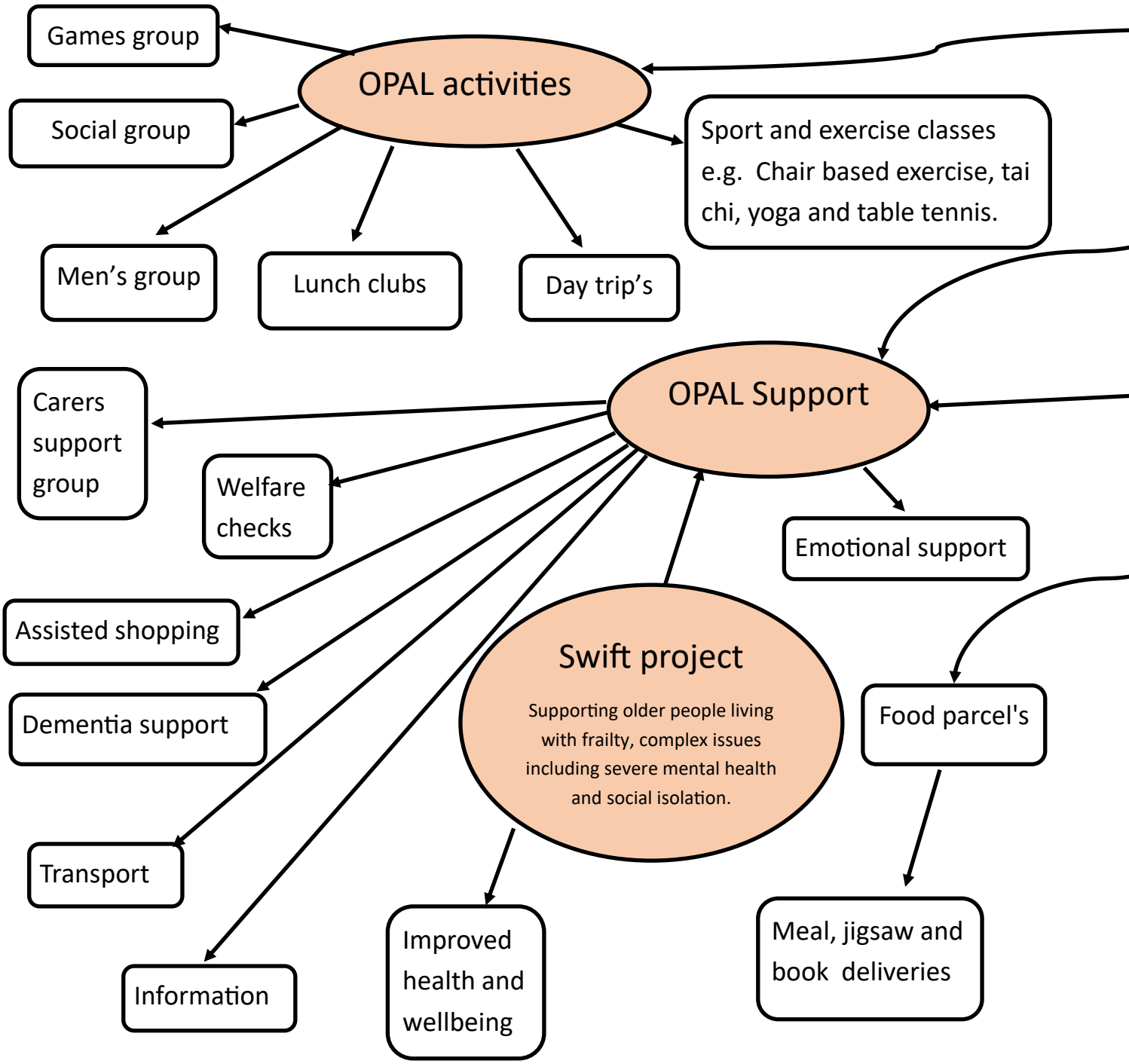
Ailsa Rhodes, CEO

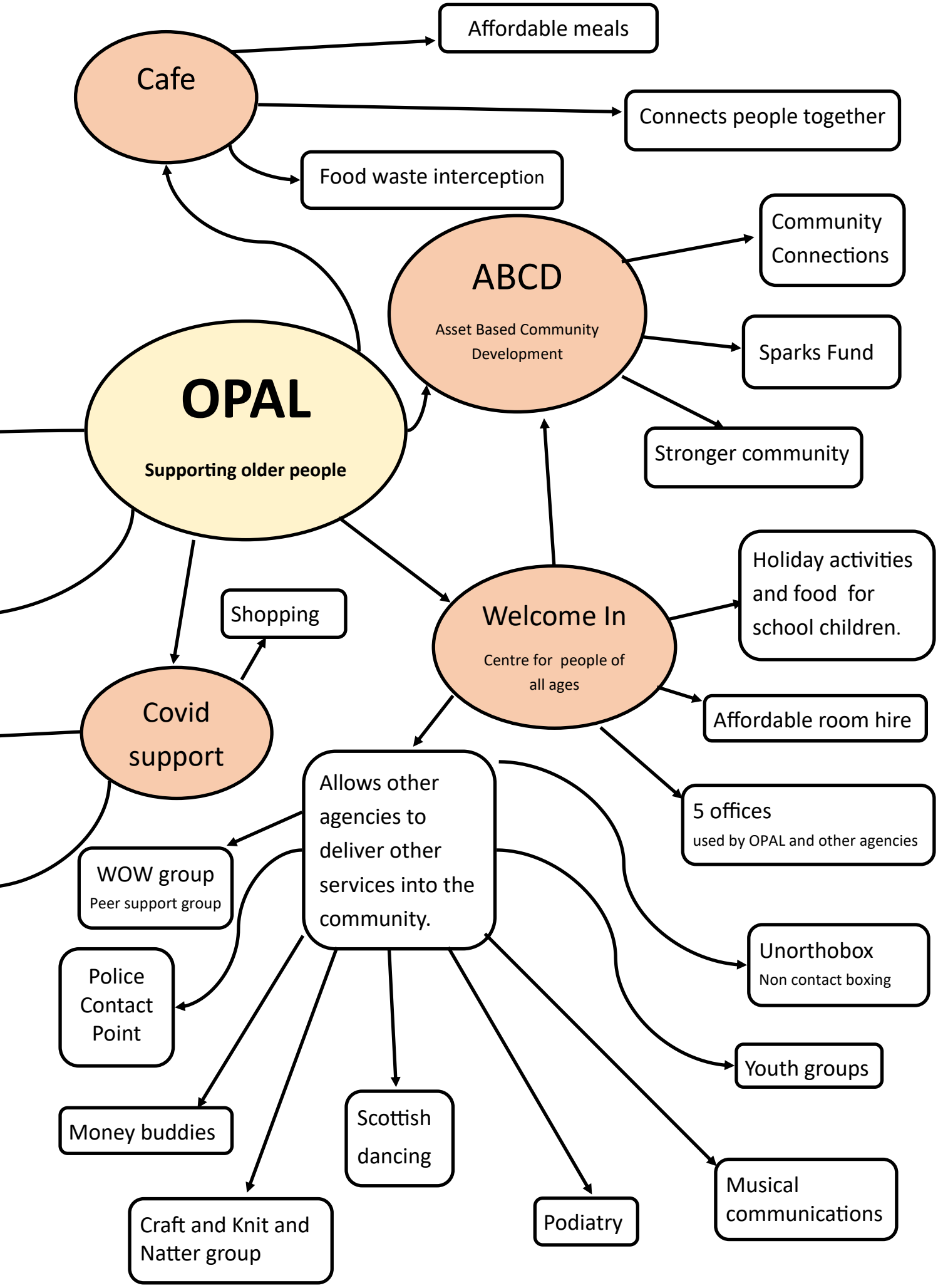
MAP of OPAL and the services and activities we offer

When OPAL moved into Welcome In Community Centre, we changed our approach from delivering services and activities to older people, to one where we took a more community facing approach to support older people.

Older people are an integral part of their community and so delivering services such as our community café which is accessible to all, helps strengthen the community as a whole.

This new approach, along with Covid, means our services have expanded and now has many components. For those who prefer a more visual display of this, the OPAL Map may be useful….




Affordable meals
Cafe
Connects people together
Food waste interception
Community Connections
ABCD
Asset Based Community Development
Sparks Fund
OPAL
Supporting older people
Stronger community
Holiday activities and food for school children.
Shopping
Welcome In
Centre for people of all ages
Covid support
Affordable room hire
Allows other agencies to deliver other services into the community.
5 offices
used by OPAL and other agencies
WOW group
Peer support group
Unorthobox
Non contact boxing
Police Contact Point
Youth groups
Money buddies
Scottish dancing
Musical communications
Craft and Knit and Natter group
Podiatry

OPAL tackling loneliness and isolation

One of the main principles of OPAL is encouraging our members to make friends and connect with this wonderful local community. We have seen first hand the detrimental effect on the mental health of those who are lonely and isolated. The centres activities and services are designed to stimulate and encourage social interaction

OPAL organises and provides 20 plus regular social activities. These activities promote and encourage our members to socialise and make friends. The centres openness and proactive support makes it as effortless as possible for our members to join in. We make reminder phone calls and during this process we will encourage and support our members to participate. Whenever possible we provide transport including wheelchair accessible transport and we provide volunteer assistance for those who require it.

Loneliness and isolation have been prominent with recent events impacting us all on a national basis. Here at OPAL, we have continued to provide services to combat this real and present social symptom of Covid by maintaining the phone buddy, door step buddy and strolling buddy projects.

In addition to this we have typically included the following activities:-

Welcome In Café

Monday, Wednesday and Friday Lunch clubs

Carers and Cared for Support group

Volunteer assisted shopping trips

Day Excursions

Games Mornings

Men's Group



We simply wouldn't be able to provide all that we do without our magnificent group of volunteers. The demographic of volunteers is varied. The benefit of these social activities don't just have a positive impact on our members, the impact can be seen with our volunteers also. Our volunteers don't just get involved in the activities and service—they are also involved in the management and strategy of OPAL and the Welcome In Community Centre. It is extremely useful to ascertain feedback from all aspects of the Centre in order for accurate and relevant decisions to be made. Everything we all do is for the benefit of older people in our community.

OPAL improving physical health

Exercise can also help improve age-related deterioration in physical and mental conditions and studies of older adults who exercise have found that they have fewer chronic diseases and feel better about their own health.

Active Ageing, Anchor Hanover Group

Within the NHS guidelines it is positively encouraged as a matter of improving physical health. They state older adults should do some type of physical activity every day. It can help to improve your health and reduce the risk of heart disease and stroke.

- aim to be physically active every day, even if it's just light activity
- do activities that improve strength, balance and flexibility on at least 2 days a week
  reduce time spent sitting or lying down and break up long periods of not moving with some activity

We accept that there are different levels of fitness and health limitations, but here at OPAL we know our instructors have many years' experience and will encourage and work with our members' limitations to improve physical health.

We have over 100 OPAL members that exercise with OPAL on a weekly basis.

Our Exercise programme includes:

- Tai chi: designed to improve balance and inner strength
- Chair exercise: improves participant's strength and balance
- Gentle exercise: Improves participant's aerobic fitness and core strength
- Table tennis: not only improves general fitness but improves spacial awareness and hand eye coordination.

In partnership with Yorkshire Dance

- Dance On: improves general fitness, timing and is great for falls prevention

The Alzheimer's society

Of all the lifestyle changes that have been studied, taking regular physical exercise appears to be one of the best things that you can do to reduce your risk of getting dementia.

OPAL has a therapy room that allows the centre to deliver therapeutic services such as massage.

Dementia support

94 OPAL members have dementia and many more identify themselves as having memory problems.

All OPAL activities are accessible to people with memory challenges and Dementia. OPAL staff and 15 volunteers are **trained in Dementia Awareness.** We use a number of strategies to encourage participation in our groups—including **prompting phone calls** and liaising with family and carers.

We also have our **Dementia Support Group** specifically for people with dementia and their carers giving both information and friendship. This project is led by Sally-Anne Notley who has a Post Graduate Diploma from Bradford University in Dementia Studies. She ensures the range of relevant activities are tailored specifically to the group of individuals attending to best meet their needs.

OPAL's Home support

22 OPAL members receive a regular friendly visitor from an OPAL volunteer.

OPAL as an organisation encourages our members to leave their homes to socialise. We know only too well that some of our members struggle to get out and about and so for these people we offer our Friendly Visiting Service. As OPAL formulates relationships with our members, we use our knowledge to match individuals to a suitable volunteer and then the volunteer visits them on a regular basis. There is a waiting list for this service, and we are always recruiting new volunteers to help us meet the demand. For people who need it, we also offer a Telephone Link service offering regular telephone calls. During lockdowns we had 450+ older people matched to a phone buddy and we continue to hear of ongoing friendships and ongoing phone contact as a legacy of this.

OPAL staff made 379 home visits to make assessments or give support.

As part of our standard process, home visits are offered to every new member to discuss OPAL and what we can offer, and we can do an assessment to ascertain what our members needs are. We also visit members who are going through a difficult time or are feeling particularly isolated but don't yet have a befriender. Whether it is a **power of attorney** or a **benefits** application, we have trained staff to assist or guide our members through the process of filling out forms.

In snowy and icy conditions, we will phone as many members as possible **to check they are warm, have food in the house and that their heating is working ok.** We loan heaters, help get tradespeople to fix heating, refer to specialist agencies or just have a chat to those who are housebound and going stir crazy because they can't get out of the house.

Winter wellbeing

Each year we do as much as we can to ensure our members stay warm and well whether that's loaning heaters, doing emergency food shopping, wellbeing visits and phone calls. This year we also ran a project which involved opening the community café an extra day for older people and the wider community so they could access a warming bowl of soup, hot drinks and information about keeping warm and well. This project helped us reach new members and helped reduce loneliness and isolation.

Intergenerational activities

One of the area that gives OPAL staff the most pleasure is to witness the interaction of our Intergenerational Projects. They are always enjoyed immensely by OPAL members and the positive effect is there for both young and old. The Annual Christmas Banquet organised by **Ralph Thoresby High School** for 80 OPAL members was a phenomenal success and was well received even with the Covid shadow still upon us.



Some students from **Ralph Thoresby High School,** completed their work placement with us. They were involved in group activities, helping with the administration, helping during lunch clubs and in the café.

Two student from **Leeds Becketts University** undertook their social work placement with us here at OPAL. This placement is a requirement of their course to work in industry and both placements have been a success to OPAL and to both these as individuals. This long term placement meant that each student was able to develop their skills and experiences whilst enabling extra support to OPAL members.

OPAL staff supported students from **The Windmill School** with their career development support through interviews and feedback.





OPAL, A little bit extra



OPAL staff and volunteers recognise the value of **friendship.** As friends, we notice the little things such as changes in behaviour or health and we will support people to get help when they need it.

OPAL's SWIFt project supports people who need regular and consistent encouragement to help them overcome social anxiety and other mental/physical health problems. This project means we can provide more intensive support to older people with complex health and social care needs.

We do emergency shopping, and unplanned home visit so we can advocate/give moral support. If appropriate, we will contact a social worker/GP/other health professional to ensure that OPAL members are safe and well.

We send Birthday Cards to all our members and our oldest members are given a Christmas Hamper which are always appreciated. We have 77 OPAL members aged 90 years+.

OPAL's Information services

The information side of OPAL is available to all older people and they can contact us via OPAL's Drop In Centre or on our telephone help line, and now by Email. We help people renew bus passes and blue badges, give information about home help, trades people, benefits and so much more. We give digital lessons for computers, phones and tablets which enables people to keep informed and connected.


OPAL NEWS

OPAL

January/February 2020

Fundraising for our final room

Welcome to Christmas Fayre

Contents

Information is also shared via our bimonthly newsletter which is available on CD, USB, cassette or in large print and we also invite speakers/professionals to some of our groups to keep OPAL members informed. OPAL continues to make/receive referrals to/from carers, family members and other agencies to ensure OPAL members receive all the support available to them.

Partnerships & support from other agencies

Here at OPAL we believe that by sharing and receiving knowledge, experience and skills, we help not only our members but the Leeds community as a whole. We believe there is real strength in working collaboratively and we take every opportunity available to work with other agencies and groups. This same philosophy extends to the groups we run as members will gain knowledge , experience and skills working together.

The Welcome In Café is used by several groups such as the **WOW group**, **Knit and Natter groups** and the **Weavers group.**



OPAL hosts and supports the local **Police and Communities Together (PACT) meetings** at Welcome In.

Local Councillors deliver their monthly surgery from the Welcome In.

Cardigan Centre Youth Point and **Youth Services** deliver Youth Groups from the Centre. The young people have taken advantage of the Free Breakfasts in the Welcome In Café during school holidays.

Dance On - Yorkshire Dance deliver fun dance sessions which improve balance, memory and coordination.



The Wednesday Lunch Club love having their lunch at **High Farm Pub** who also organise live music and entertainment as part of the afternoon.

EcoClean and Home Instead Ltd are our anchor tenants at Welcome In.

Westward Care pay for the design and printing costs of our newsletter. They introduced us to **Tom, Dick and Harry Studio** who design our Newsletter as well as our Welcome In logo and signs.

Our Friday social group made scarecrows for the **Cookridge Scarecrow Festival.**

OPAL members benefit greatly from the partnerships we have with many Health and Social Care agencies such as **Linking Leeds, Social Prescribing Service, Community Care Coordinators, Woodsley and Holt Park Local Care Partnership, Primary Care Network** and **Adult Social Care**.



Our work in the community is enhanced through partnerships with **local churches, schools** and **local businesses.**

THANK YOU SO MUCH TO OUR FABULOUS VOLUNTEER TEAM



OPAL Volunteers are essential to OPAL's ability to provide our first rate service supporting older people in the community. We are extremely fortunate to have our volunteers involved in all aspects of OPAL life. All of our volunteers know that we have an 'open door policy' and if they need to speak to us we will make ourselves available. We really appreciate everything our volunteers do for us and we will give support, supervision and training. We host at least 2 Volunteer Appreciation events a year as a way of saying 'Thank 'You for all your help and hard work.

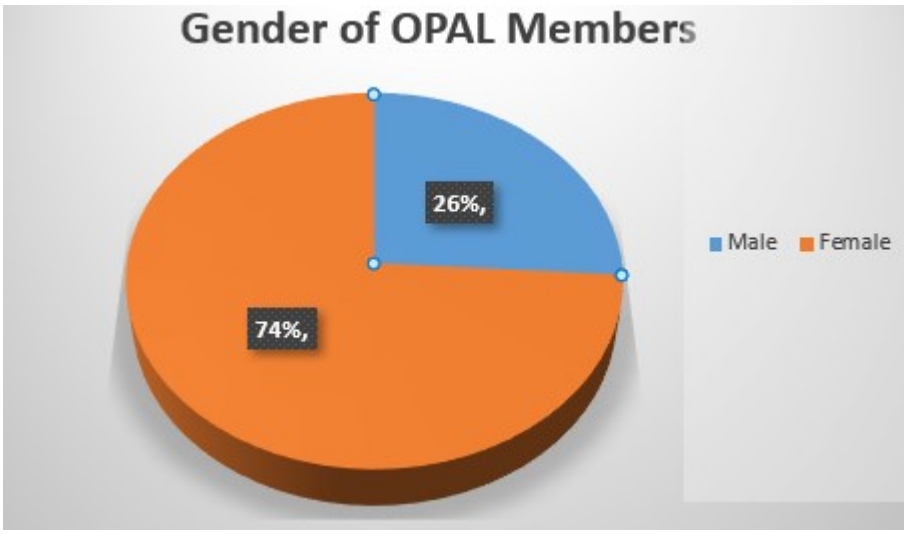
<u>Volunteer Roles include:</u>

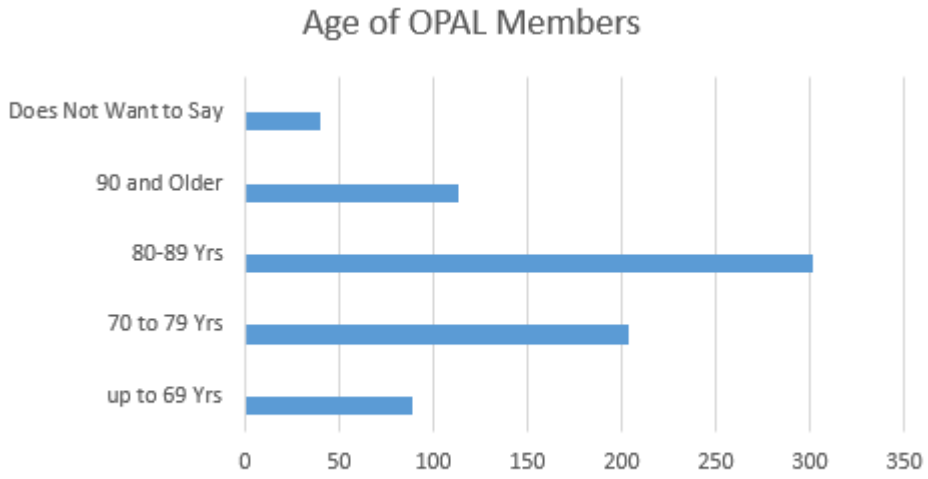
- Helping at all OPAL activities
- Representation at the Committee Meetings
- Administration
- Cooking
- Serving meals
- Friendly visits
- Phone calls
- Helping with social groups
- Pushing wheelchairs
- Assisting with day trips
- Leading the shopping trips
- Newsletter collation and delivery
- Providing transport
- Gardening
- Litter picking
- Massage
- Bookkeeping
- Posting newsletters
- Delivering birthday cards and Christmas hampers
- Providing information
- Fundraising

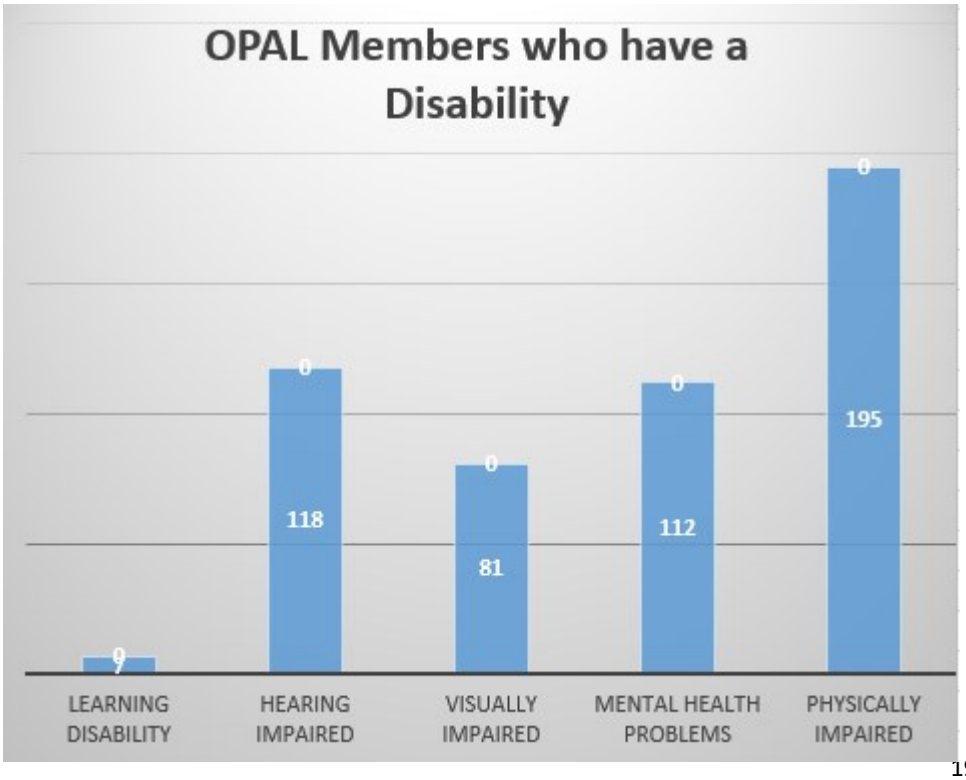




OPAL Members - some statistics







Monitoring and Evaluation



Feedback is invaluable and so in order to ensure that we continue to develop our services in a way that meets the needs of OPAL members, we consult with our members and monitor and evaluate our services by:-

- Asking for verbal and written feedback after our activities.
- OPAL members are represented on our Management Committee by several volunteers. Feedback and suggestions from these groups are obtained during the regular volunteer meetings and Management Committee meetings.
- Having a comments/compliments and complaints box in the drop-in centre.
- Sending an annual questionnaire to each of our members.
- We are also very welcome to any verbal feedback.

Annual Questionnaire April 2022

We had a response rate of 10% which gives us information and feedback from our users to help us evaluate our services and plan for the future. There were a lot of ideas and comments which will be considered and used to inform future strategic decisions.

Why are you an OPAL member?

Some answers were: "I only moved to Leeds 3 years ago and I needed to make friends (2 years of which were lockdown!)", "I went to their first premises at Holt Park and met Ailsa, Sally-Anne, Rowan, and the rest of the team, I was then hooked by their enthusiasm", "I believe OPAL is a fantastic support group within the community.", "I admire what OPAL does for the community, young and old. New friendships to be gained, skills and memories to pass on."

It's lovely to hear so many nice things about why people are members. It is especially nice to hear that people joined when we were in Holt Park and have stayed with us when we moved to the Welcome In.

Are there any current activities that we don't offer that you would be interested in?

- I did enjoy singing with the children.
- Walking group.
- Local cinema?
- Joining people for a walk or coffee.
- Love to do Zumba gold.

If we get enough interest in a certain activity we will look into making it possible, so please let us know what you would like! These activities are also something that a volunteer could run, if you would be interested in running a walking group or cinema club please do get in touch! There is a walking group based in Holt Park, if you would like info on this please ask a member of staff.

Would you say that your feelings of loneliness have changed since joining OPAL?

52% of those who completed the survey said that they feel less lonely since being a member of OPAL.

Annual Questionnaire April 2022 (continued)



What does OPAL do best?
The most popular response to this question was: 'Providing social contact/friendship'. This was followed by: 'Practical information and advice'.

Why do you use OPAL?
The top three most popular responses to this question were: 'For friendship', 'To support OPAL', and 'Just in case I need support from OPAL in the future'.

If you haven't attended any of OPAL's trips, is there a reason why not?
Too long on the bus – no toilet.
Partly covid, partly expense.
None provided for groups attended.
Not knowing people is a little off putting.
Don't want to travel in a minibus – not very comfortable.
Early start and being out all day – too tiring.

In the future we are planning on running much shorter trips that also start later in the day. We use the minibus for our shorter trips as it is more cost effective. For our bigger trips that are further away we will use a coach. Everyone is welcome on our trips regardless of what activities you do or do not attend. If you are unsure about going on a trip, you are more than welcome to stay with a member of staff or volunteer for the day, they will help you get to know people.

If you would like to get out of the house more often, is there anything that would help you to do so?
Transport.
Someone to come with me and help me.
With assistance.

Our trips and activities are run with a staff member present and with volunteers. If you require assistance please let us know and we will do our best to accommodate this. We also offer transport to most of our activities.

What can OPAL improve on? - ***thank you for all your wonderful comments!***
I think you are doing just fine, long may you continue.
Joining OPAL was the best thing I ever did.
The coffee at lunch club - ***we use instant coffee at the lunch club because it is cheaper and easier to use.***
I just need to make an effort to get involved again.

Try to encourage more older people to see and use the facilities you offer - **we try our best to reach as many older people in the Leeds16 community through word of mouth, posters, OPAL's newsletter, social media and through referrals from other agencies.**

Treasurer's Report



As always, we are eternally grateful to those people and businesses that support us financially no matter how big or small the donation is. We end the financial year with a warning outlook for the future with the inevitable rise of costs to not just our organisation but for all businesses and households. The war between Russia and Ukraine will continue to affect the global markets as countries seek alternative ways to source energy. Having said that, the economic hardships that we are to face are insignificant against those experienced by the people who have to move forward with their lives while the bullets fly and the bombs fall.

Inflation caused by fuel costs is something we as an organisation have to deal with head on. Small businesses and our community members will have less disposable income. Increasing our costs will only deter members from attending OPALs facilities when it's as important as ever to bond again together in community projects, and activities that will promote purpose and well-being. As I write this piece, I hope that the government see fit to ensure that a potential social and economic disaster is averted and that our fuel bills remain manageable at all levels and walks of life.

As we carefully tread back out of the Covid restrictions, the Centre has begun to generate income from the room hire with the Heather and Sunshine rooms looking splendid after their makeover. Other rooms such as the Therapy room and small meeting room once again began to generate pockets of income for the Centre.

The Café has been transformed to a chic and approachable space where we can enjoy quality coffee and cake, through to amazing meals prepared by the staff. The high standard of the food and friendly atmosphere has generated a reputation around the local neighbourhood and as such is starting to create a modest income for the Centre.

The Council grant which was awarded to us in 2019 is still current and will continue until 2024. This grant funds 25% of our annual turnover. This funding means we have the foundations to build on for a stable and effective service. That said, it is a never ending challenge to find the funds to plug the gaps and we are incredibly grateful to all those who have supported us financially—big and small!

Treasurer's Report Continued



There is still concern over OPAL's long term financial future. Where the buds of recovery for the Centre are apparent, this will only continue if we can manage our cost base on costs that we can control. I will say again that external factors can and will turn the Centre into financial choppy waters.

With Covid, came a number of grants to help the Centre focus on the problems that occur when one is in isolation and forced to stay at home. The focus of the grants is now predominately to encourage the community to get out and visit the Centre and fortunately we have been successful in applying for some of these grants.

One trend that is becoming more rigid is the effort and management required to report on the positive impact that the money is having on the various projects. This does have an impact on our internal resources as time spent on the need to generate the reports does mean time away from focusing effort back into OPAL services.

The net income for the year was £18,563, including net income of £48,487 on unrestricted funds and net expenditure of £29,924 on restricted funds.

Reserves policy: The charity's free reserves, excluding fixed assets, at the year end were £211,372. The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the Charity, which equates to between £113,290 and £198,257 based on budgeted expenditure of £339,870. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors. Our year end reserves were above that upper level, however we are currently utilising that surplus and we anticipate that our reserves at March 2023 will be £150,000 - £160,000.

In order to ensure our future security, we have prepared a budget and cashflow for the next two years. We have minimised costs wherever possible and are taking action to maximise income through as many income streams as possible.

Howard Marshall

Treasurer



A special thank you to OPAL members, volunteers, friends, local businesses, schools, universities and groups who have supported us by giving their time, donations, raffle prizes and discounts.

We received a total amount of £29,851 from donations and fundraising which is a phenomenal amount of money. A big thank you to everyone who contributed to this and I am sorry that we don't have the space to list all your names.

Thank you also to our very generous funders. Without financial support from **Leeds City Council, Charitable Trusts** and other **grant giving agencies**, OPAL would not exist.

Restricted Funds:

Fund name	**Purpose of restriction**
LCC ASC	For OPAL's work supporting older people
LCC ABCD	To deliver ABCD project
LCC	Towards Covid relief support
Jimbo's Fund	For carers and men's groups
Power to Change	Renovation of Welcome In
SWIFT	Funding from Public Health to support frail older people
Harrison Potter Trust	Exercise classes
Voluntary Action Leeds	To be available to support care agencies
LCF Lunch clubs	To deliver lunch clubs
LCC MICE	Councillor funds for Christmas hampers/Jubilee tree
Wades Charitable Trust	Social Group
LOPF	Covid support from Public Health & Digital inclusion
Leeds Bereavement Forum	Dying matters event
Yorks Dalesage	Timber for planters to create bee-friendly environment

In a bid to create a financially secure future, OPAL works hard to generate its own income and to develop new income streams wherever possible. We are however, still very reliant on grants and donations. We are forever grateful of those who support us and we endeavour to ensure that every penny is spent wisely and in line with our aims and objectives.

Full financial report is available on request.

Office:

Welcome In Community Centre
55 Bedford Drive, LS16 6DJ
Telephone: 0113 2619103
Email: admin@opal-project.org.uk *www.opal-project.org.uk*
Twitter@OPALLeeds16 *Facebook: Older People's Action in the Locality*
Instagram@OPALLeeds16

OPAL
OLDER PEOPLE'S ACTION IN THE LOCALITY



The Committee:

Martin Sellens, Chairman
Howard Marshall Treasurer

Elizabeth Locke
Peter Ellis
Chris Hindle
Grace Clark
Jennifer Ward
Gary Hartley
Louise Tanner
John Sutcliffe

Advisors to Committee
Cllr Barry Anderson

Staff:

Ailsa Rhodes	*CEO*
Sally-Anne Notley	*Deputy Manager*
Shelley Clark	*Project Worker*
Hattie Easton	*Project Worker*
Mandy Moran	*Project Worker*
Bev Fletcher	*SWIFt Worker*
Kate Taverner	*SWIFt Worker*
Ellen Stoker	*Community Builder*
Nikki Sloper	*Café Manager*
Gail Place	*Café Worker*
Natalie Gloveli	*Café Worker*
Jennifer Kitching	*Café Worker*
Steve Hogg	*Digital Inclusion*

WELCOME IN
Community
Centre & Cafe



Volunteers furniture painting for our community cafe



Silent Disco



Games group



Parents of Small Biz at Welcome in Cafe



Christmas Fayre



Halloween fun



Gifts for the Kindness Festival



Police and Lord Mayor join us









A selection of tasty treats served from Welcome In cafe



Ukraine Fundraising event



Mini First Aid (for children)



Gem and Engie creating our orchard area



Craft Group



School holiday fun



Bellwether Yarns create our own 'Welcome In' coloured yarns



Street dance at our Community Fun Day



Fareshare Friday market









A selection of tasty treats served from Welcome In cafe









OPAL is a registered charity limited by guarantee and registered in England and Wales (registered charity number 1131792 and registered company number 06961204)

Older People's Action in the Locality

Charity number 1131792

A company limited by guarantee number 06961204

Annual Report and Financial Statements

for the year ended 31 March 2022

OPAL

OLDER PEOPLE'S
ACTION IN THE LOCALITY

WYCAS COMMUNITY ACCOUNTING

West Yorkshire Community Accounting Service

Older People's Action in the Locality

Annual Report and Financial Statements

for the year ended 31 March 2022

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Examiner's report	5
Statement of financial activities	6
Balance sheet	7
Notes to the accounts	8 to 13

Prepared by West Yorkshire Community Accountancy Service CIO

Older People's Action in the Locality

Trustees' report for the year ended 31 March 2022

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
Martin Sellens	Chair	
Howard Marshall	Treasurer	
Peter Ellis		
Grace Clark		
Gary Hartley		
Christopher Hindle		
Elizabeth Locke		
Jennifer Ward		
John Sutcliffe		Appointed November 2021
Louise Tanner		Appointed November 2021

Company secretary	Ailsa Rhodes
Charity number	1131792 Registered in England and Wales
Company number	06961204 Registered in England and Wales

Registered and principal address
Welcome In Community Centre
55 Bedford Drive
Leeds
LS16 6DJ

Bankers
National Westminster Bank
491 Otley Road
Leeds
LS16 7YB

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

Independent examiner
Simon Bostrom FCIE
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 14 July 2009. It is governed by a memorandum and articles of association as amended 18 June 2020. The liability of the members in the event of the company being wound up is limited to a sum not exceeding £1.

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.

Older People's Action in the Locality

Trustees' report (continued) for the year ended 31 March 2022

Objectives and activities

The charity's objects

The objects are to further or benefit the residents of Cookridge, Holt Park, Ireland Wood, Tinshill, Adel and Bramhope (most of the Leeds 16 postcode) and surrounding areas, particularly but not exclusively for the elderly, without distinction of sex, sexual orientation, race or of political, religious or other opinions by associating together the said residents and the local authorities, voluntary and other organisations in a common effort to advance education and to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents and to strengthen the local communities in which they live.

The charity's main activities

OPAL reduces social isolation and promotes the wellbeing of older people so that they can live independently in their own homes. We do this by offering opportunities for healthy living and social activities, practical support and an information service.

OPAL is based in and manages the Welcome In Community Centre and Community Cafe. The Centre and Cafe is a facility for all the community and provides a source of revenue for OPAL as well as providing opportunity for integration of older people with the wider community.

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 the health and wellbeing of older people.

Achievements and performance

OPAL has continued to be the Covid Volunteer Hub providing support to the LS16 community including emergency food parcels, picking up prescriptions and transport to appointments and vaccinations. We have recruited extra volunteers to help with this as well as to take on roles such as shopping and phone buddies and delivering information leaflets.

We have continued to support older people in the community and in line with regulations have adapted our services throughout to provide remote support such as hot meal delivery, doorstep visits, phone buddying and shopping support.

As restrictions allowed we have delivered face to face activities taking precautions such as minimising capacity, ventilating the building, wearing masks and sanitising. We have seen the terrible impact that isolation and lock down has had on older people’s physical and mental health and so where ever possible have delivered face to face social, healthy and wellbeing activities.

Many OPAL members tell us we have been a lifeline to them.

Financial review

The net income for the year was £18,563, including net income of £48,487 on unrestricted funds and net expenditure of £29,924 on restricted funds.

Reserves policy

The charity's free reserves, excluding fixed assets, at the year end were £211,372.

The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the charity, which equates to between £113,290 and £198,257 based on budgeted expenditure of £339,870. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors.

Our year end reserves were above that upper level, however we are currently utilising that surplus and we anticipate that our reserves at March 2023 will be £150,000 - £160,000.

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.

Signed on behalf of the board of trustees on 21/09/2022

Martin Sellens (Trustee)

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2022, which are set out on pages 6 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
Since the charitable company's gross income exceeded £250,000 your examiner must be a fellow of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a fellow of ACIE which is one of the listed bodies.

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.

Simon Bostrom FCIE

23/09/2022

West Yorkshire Community Accountancy Service CIO
Stringer House
34 Lupton Street
Leeds
LS10 2QW

Older People's Action in the Locality

Statement of Financial Activities

(including summary income and expenditure account)

for the year ended 31 March 2022

	Notes	2022 Unrestricted funds £	2022 Restricted funds £	2022 Total funds £	2021 Total funds £
Income from:					
Grants and donations	(2)	27,460	244,594	272,054	395,996
Fees and charges		89,025	-	89,025	33,344
Memberships		6,738	-	6,738	3,617
Fundraising		3,425	-	3,425	4,510
Bank interest		1,046	-	1,046	1,303
In kind services	(3)	5,348	-	5,348	-
Other income		6,392	-	6,392	6,574
Total income		139,434	244,594	384,028	445,344
Expenditure on:					
Salaries and NI	(4)	24,691	177,069	201,760	157,997
Payroll costs		-	1,952	1,952	1,604
Staff travel expenses		44	403	447	92
Training		-	135	135	662
Volunteer expenses and training		-	290	290	62
Events and activities		10,623	29,615	40,238	33,728
Café supplies and equipment		14,046	9,597	23,643	1,606
Equipment and materials		95	2,618	2,713	344
Premises costs		1,624	20,499	22,123	13,276
Phone, postage and internet		-	6,128	6,128	5,845
Computers and IT		-	5,864	5,864	6,598
Printing and stationery		91	2,337	2,428	4,021
Memberships and subscriptions		520	3,015	3,535	2,462
Insurance		-	4,891	4,891	4,660
Hospitality and sundry costs		53	331	384	483
Governance costs		57	216	273	141
Independent examination		-	1,380	1,380	1,380
Legal and professional		-	500	500	709
Repairs and maintenance		1,184	6,444	7,628	7,661
In kind services - landscaping works	(3)	5,348		5,348	-
Depreciation		32,440	-	32,440	32,984
Loan interest		1,365	-	1,365	991
Total expenditure		92,181	273,284	365,465	277,306
Net income / (expenditure)		47,253	(28,690)	18,563	168,038
Fund balances brought forward		738,107	92,432	830,539	662,501
Fund balances carried forward	(5)	786,594	62,508	849,102	830,539

All incoming resources and resources expended derive from continuing activities.

Older People's Action in the Locality

Balance sheet

as at 31 March 2022

		2022 Unrestricted £	2022 Restricted £	2022 Total £	2021 Total £
Fixed assets					
Tangible assets	(6)	575,222	-	575,222	584,708
Total fixed assets		575,222	-	575,222	584,708
Current assets					
Debtors and prepayments	(7)	11,197	-	11,197	3,942
Cash at bank and in hand	(8)	230,628	62,508	293,136	278,522
Total current assets		241,825	62,508	304,333	282,464
Current liabilities: amounts falling due within one year					
Creditors and accruals	(9)	7,984	-	7,984	8,979
Total current liabilities		7,984	-	7,984	8,979
Net current assets / (liabilities)		233,841	62,508	296,349	273,485
Total assets less current liabilities		809,063	62,508	871,571	858,193
Creditors: amounts falling due after one year	(10)	22,469	-	22,469	27,654
Net assets		786,594	62,508	849,102	830,539
Funds					
Unrestricted funds		786,594	-	786,594	738,107
Restricted funds		-	62,508	62,508	92,432
Total funds		786,594	62,508	849,102	830,539

For the year ending 31 March 2022 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 21/09/2022

Martin Sellens (Trustee)

Older People's Action in the Locality

Notes to the accounts

for the year ended 31 March 2022

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.

Tangible fixed assets

Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition. Gifted assets are shown at the value to the charity on receipt.

Depreciation is provided on all tangible fixed assets at rates calculated to write off the cost on a straight line basis over their expected useful economic lives as follows:

Fixtures and equipment: over 5 years
Leasehold improvements: over the life of the lease

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.

Leases

Rents under operating leases are charged on a straight line basis over the lease term or to an earlier date if the lease can be determined without financial penalty.

2 Grants and donations

	2022 Unrestricted funds £	2022 Restricted funds £	2022 Total funds £	2021 Total funds £
Harrison and Potter Trust	-	7,777	7,777	7,406
Leeds City Council (LCC)	-	203,126	203,126	186,356
Leeds Community Foundation	-	7,821	7,821	-
Leeds Older Peoples Forum (LOPF)	-	1,550	1,550	7,000
Power to Change	-	20,000	20,000	57,500
Wades Charity	-	3,120	3,120	-
Voluntary Action Leeds	-	1,000	1,000	-
CAF for Carers	-	-	-	350
Clothworkers Foundation	-	-	-	25,000
Co-op Foundation	-	-	-	4,873
Edward Gostling Foundation	-	-	-	5,000
HMRC Coronavirus Job Retention Scheme (CJR	-	-	-	1,861
Independent Age	-	-	-	10,000
LCC MICE grants	-	-	-	1,200
Leeds Inner NW Housing Panel	-	-	-	7,414
Leeds Outer NW Housing Panel	-	-	-	6,991
Moor Allerton	-	-	-	1,000
National Lottery Community Fund	-	-	-	6,281
The Bernard Sunley Charitable Foundation	-	-	-	5,000
Time to Shine	-	-	-	37,500
Other grants and donations (including gift aid)	27,460	200	27,660	25,264
	27,460	244,594	272,054	395,996

3 Donated services

During the year landscaping works were carried out to the charity's premises at no cost.

The value of this work as shown in the accounts at £5,348 is the amount that the charity woulld pay in the open market for those services.

4 Staff costs and numbers

	2022 £	2021 £
Gross salaries	188,976	149,076
Social security costs	11,994	9,009
Employment allowance	(4,000)	(4,000)
Pensions	4,790	3,912
	201,760	157,997

The average number of employees during the year was 13.2, being an average of 7.5 full time equivalent (2021: 10.4, 7 FTE). There were no employees with emoluments above £60,000.

Defined contribution pension scheme	2022 £	2021 £
Costs of the scheme to the charity for the year	4,790	3,912
Amount of any contributions outstanding at the year end	-	-

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2022

5 Restricted funds	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
LCC ABCD	35,050	25,000	28,526	-	31,524
LCC ASC grant	6,368	84,626	88,119	-	2,875
Brelms Trust	443	-	443	-	-
Jimbo's Fund Carers	-	3,700	-	-	3,700
Harrison Potter Trust	3,055	-	3,055	-	-
LCC Small Sparks Fund	700	-	100	-	600
Sir George Martin Trust	179	-	179	-	-
Wades Charitable Trust	578	-	578	-	-
Co-op	4,814	-	4,814	-	-
LCC Covid grants	20,096	-	20,096	-	-
Power to Change - IT and Café	10,346	-	9,112	(1,234)	-
Power to Change - renovation	-	20,000	20,000		-
SWIFT	10,803	30,000	28,514	-	12,289
Harrison Potter Trust Exercise	-	7,777	3,168	-	4,609
Jimbo's Fund Mens Group	-	946	-	-	946
LCC Covid	-	5,000	5,000	-	-
LCC Covid £48k	-	57,000	55,190		1,810
LCC Care support	-	1,000	-	-	1,000
LCF Lunch clubs	-	3,175	3,175	-	-
Leeds Bereavement Forum	-	160	-	-	160
LOPF Digital	-	550	550	-	-
LOPF	-	1,000	1,000	-	-
LCC Mice	-	300	300	-	-
LCC Mice	-	40	40	-	-
Wades Friday Social	-	3,120	125	-	2,995
Voluntary Action Leeds		1,000	1,000	-	-
Yorks Dalesage	-	200	200	-	-
	92,432	244,594	273,284	(1,234)	62,508

Fund name	Purpose of restriction
LCC ABCD	To deliver ABCD project
LCC ASC grant	For OPAL's work supporting older people
Brelms Trust	For carer and men's groups
Jimbo's Fund Carers	To fund Carers and Cared for group
Harrison Potter Trust	Digital inclusion project
LCC Small Sparks Fund	To distribute to community members for community development work
Sir George Martin Trust	For a shopping support scheme
Wades Charitable Trust	To fund chair exercise classes
Co-op	To improve the grounds
LCC Covid grants	Towards Covid relief support
Power to Change - IT and Café	Development of the café, website and database. The transfer relates to fixed assets depreciated from the general fund.
Power to Change - renovation	Development of the café
SWIFT	Funding from Public Health to support frail older people
Harrison Potter Trust Exercise	To fund exercise classes
Jimbo's Fund Mens Group	Jimbo's Fund To support the Men's Group
LCC Covid	Towards Covid relief support
LCC Covid £48k	Towards Covid relief support
LCC Care support	To be available to support care agencies
LCF Lunch clubs	Lunch clubs

5 Restricted funds continued

Fund name	Purpose of restriction
Leeds Bereavement Forum	Dying matters event
LOPF Digital	Providing digital support
LOPF	Covid grant from Public Health
LCC Mice	Christmas activities
LCC Mice	Purchase of cherry tree
Wades Friday Social	To fund chair exercise classes
Voluntary Action Leeds	Covid relief
Yorks Dalesage	Timber for planters to create bee-friendly environment

6 Tangible assets

	Leasehold property	Fixtures and equipment	Total
Cost	£	£	£
At 1 April 2021	670,513	25,078	695,591
Additions	21,720	1,234	22,954
At 31 March 2022	692,233	26,312	718,545
Depreciation			
At 1 April 2021	100,056	10,827	110,883
Charge for year	28,179	4,261	32,440
At 31 March 2022	128,235	15,088	143,323
Net book value			
At 31 March 2022	563,998	11,224	575,222
At 31 March 2021	570,457	14,251	584,708

7 Debtors and prepayments

	2022	2021
	£	£
Debtors	-	2,500
Amounts owed by subsidiary company	-	
Prepayments	1,329	1,442
Accrued income	9,868	
Other debtors	-	
	11,197	3,942

8 Cash at bank and in hand

	2022	2021
	£	£
Cash at bank	292,927	278,362
Cash in hand	209	160
	293,136	278,522

9 Creditors and accruals

	2022	2021
	£	£
Bank loans and overdrafts	5,185	5,355
Creditors	1,419	-
Accruals	1,380	1,380
Fees received in advance	-	2,244
	7,984	8,979

10 Creditors: amounts falling due after one year

	2022	2021
	£	£
Bank loans	22,469	27,654
	22,469	27,654

11 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 were £67,266 (previous year: £63,678).
No trustee received any remuneration or benefit in this capacity during this or the previous year.

12 Operating leases

Expected future minimum lease payments over the remaining life of the lease, analysed into the period in which the commitment falls due:	2022	2021
	£	£
Within one year	132	130
In the second to fifth years inclusive	528	520
Over five years from the balance sheet date	2,002	2,102
	2,662	2,752

Older People's Action in the Locality

Statement of Financial Activities including comparatives for all funds (including summary income and expenditure account) for the year ended 31 March 2022

	2022 Unrestricted funds £	2021 Unrestricted funds £	2022 Restricted funds £	2021 Restricted funds £	2022 Total funds £	2021 Total funds £
Income						
Grants and donations	27,460	40,414	244,594	355,582	272,054	395,996
Fees and charges	89,025	33,344	-	-	89,025	33,344
Memberships	6,738	3,617	-	-	6,738	3,617
Fundraising	3,425	4,510	-	-	3,425	4,510
Bank interest	1,046	1,303	-	-	1,046	1,303
In kind services	5,348	-	-	-	5,348	-
Other income	6,392	6,574	-	-	6,392	6,574
Total income	139,434	89,762	244,594	355,582	384,028	445,344
Expenditure						
Salaries and NI	24,691	-	177,069	157,997	201,760	157,997
Payroll costs	-	-	1,952	1,604	1,952	1,604
Staff travel expenses	44	52	403	40	447	92
Training	-	-	135	662	135	662
Volunteer expenses and training	-	10	290	52	290	62
Events and activities	10,623	12,422	29,615	21,306	40,238	33,728
Café supplies and equipment	14,046	164	9,597	1,442	23,643	1,606
Equipment and materials	95	-	2,618	344	2,713	344
Premises costs	1,624	158	20,499	13,118	22,123	13,276
Phone, postage and internet	-	-	6,128	5,845	6,128	5,845
Computers and IT	-	40	5,864	6,558	5,864	6,598
Printing and stationery	91	483	2,337	3,538	2,428	4,021
Memberships and subscriptions	520	1,465	3,015	997	3,535	2,462
Insurance	-	-	4,891	4,660	4,891	4,660
Hospitality and sundry costs	53	201	331	282	384	483
Governance costs	57	141	216	-	273	141
Independent examination	-	84	1,380	1,296	1,380	1,380
Legal and professional	-	-	500	709	500	709
Repairs and maintenance	1,184	-	6,444	7,661	7,628	7,661
In kind services - landscaping works	5,348	-	-	-	5,348	-
Depreciation	32,440	32,984	-	-	32,440	32,984
Loan interest	1,365	991	-	-	1,365	991
Total expenditure	92,181	49,195	273,284	228,111	365,465	277,306
Net income / (expenditure)	47,253	40,567	(28,690)	127,471	18,563	168,038
Transfers between funds	1,234	77,877	(1,234)	(77,877)	-	-
Net movement in funds	48,487	118,444	(29,924)	49,594	18,563	168,038
Fund balances brought forward	738,107	619,663	92,432	42,838	830,539	662,501
Fund balances carried forward	786,594	738,107	62,508	92,432	849,102	830,539

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2022, which are set out on pages 6 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
Since the charitable company's gross income exceeded £250,000 your examiner must be a fellow of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a fellow of ACIE which is one of the listed bodies.

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.

Signed: …… Name: Simon Bostrom FCIE

23/09/2022

West Yorkshire Community Accountancy Service CIO
Stringer House
34 Lupton Street
Leeds
LS10 2QW

OLDER PEOPLE'S ACTION IN THE LOCALITY

England & Wales - Charity number 1131792

Accounts

The Queen's Award for Voluntary Service

The MBE for volunteer groups

OPAL

OLDER PEOPLE'S ACTION IN THE LOCALITY

WELCOME IN Community Centre & Cafe

Reducing isolation and improving the quality of life for older people





Annual Report

1st April 2020 - 31st March 2021

OPAL is a registered charity limited by guarantee and registered in England and Wales (registered charity number 1131792 and registered company number 06961204)

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Chairman's Report 2021



Another year has passed and it is fair to say that OPAL has risen to the unprecedented challenges posed by the global Covid pandemic. I would like to thank the staff and volunteers for their diligent and compassionate contributions during this extraordinary time. They worked tirelessly to ensure our ethos of decreasing social isolation and increasing social activities was maintained throughout these demanding times.

Our team has worked tirelessly to provide services through-out the year. I would like to thank each and every one of you for your enthusiasm and dedication. We have been joined this year by new staff members who have made outstanding contributions to our services. Nikki has transformed the café which initially resembled a functional school canteen into a retro haven that is now a pleasure to relax in and enjoy the delicious delights of the new menu. Ellen has developed our Asset Based Community Development (ABCD) Project identifying and building on the resources, skills, and experience available in the community – we are excited at the potential for this project as restrictions ease. Another new staff member, Steve, who joined us this year, provided invaluable support to members particularly in relation to video conferencing which was a life-line for people during the pandemic. Steve's IT experience is indispensable and his knowledge of smart phones and internet related problem knows no bounds.

We are very grateful to Rowan Ackroyd and Anne Sellens who both retired during this year. They both started at OPAL as volunteers before becoming core members of the staff team for 10+ years. Both had many roles at OPAL but latterly Rowan led the Friday coffee afternoon and put our newsletter together whilst Anne led the day trips, cooked for one of the weekly lunch clubs, did home visits and helped with benefits forms for OPAL members. Johanna and Jenn also left the staff team this year to move onto pastures new but we are very pleased that they both continue to be part of the OPAL team with Johanna volunteering to help in the garden and Jenn becoming an OPAL Trustee.

Despite this being the most challenging of years, we were able to forge ahead with the development of Welcome In by securing the funds needed to renovate the Heather Room and so complete the renovation of the building. In the near future we hope to have further improvements to the grounds of the "Welcome In". We have already received quotes as we are hoping to tarmac parts of the car park.

Finally, I would like to give a special thanks to Ailsa, whose vision of providing exceptional services to the community has been realised. It is through her gritty determination and benevolent spirit that OPAL found its new home and is flourishing and expanding on its achievements year on year.

Peter Ellis, Chairman

CEO's report



OPAL was at the front line supporting older and vulnerable people during the pandemic and it was a privilege to work with and be supported by so many individuals, groups and organisations.

One of our first courses of action was to link up with local churches and local Councillors to ensure that everyone in our community had a point of contact for support if they needed. The PCSO's and Cookridge Fire crews helped with food parcel and leaflet deliveries and when we were concerned about individuals, they did a home welfare check too. We also worked in partnership with other groups such as Bramhope Covid Support group, Peace Matters, STEP and InterACT to ensure any request for support in the Adel and Wharfedale & Weetwood Wards was met. Ralph Thoresby put together Christmas hampers, Aireborough Rotary Club gave us masks made by their sewing group and Team Impression Ltd printed information leaflets for us.

Our involvement in the Local Care Partnership meant that we were able to play a key role working with NHS and other community organisations to improve health and care delivery to local people. Leeds City Council pulled out all the stops to support us with our work by giving us financial support, information and regular contact to make sure we were ok. The local community were amazing and never failed to help when we asked whether it was helping us to source a freezer or an old fashioned typewriter or donating anything from pet food, baby products, food or money. In the midst of January 2021 when it was thick snow and ice and our regular drivers were unable to deliver hot meals, we put out a call on local social media for help and immediately had our team of four wheel drivers on board for the bad weather days.

We frequently received phone calls from older and vulnerable people confused about what they were 'allowed to do' and frightened about going out but also frightened of staying in on their own. We offered reassurance and friendship mainly by phone but when needed we would visit and chat from the garden gate or through a window. We supported many individuals on a one to one basis, including one gentleman who we helped get a locksmith when he locked himself out of his house, visited him at home to check he was ok when he didn't answer wellbeing calls and latterly when he passed away, because his family lived abroad and were unable to travel to the UK, we went to his house to collect his mail, empty the fridge, switch off the power and generally shut the house down until the family could sort something out.

I have always been proud to work at OPAL and proud of everything we have achieved, but this year our staff, volunteers and trustees were nothing short of magnificent. Thank you.

Ailsa Rhodes, CEO

Covid-19 Response



We recognised immediately that we were ideally placed (and also the only agency in the area with the resources) to provide support for people of all ages in the community.

We supported not just our 660 members, but also managed hundreds of referrals from Leeds City Council Covid helpline and from the community.

We increased our volunteer team from 100+ to 300+ and we estimate OPAL coordinated a massive 53,790 acts of kindness as part of the Covid-19 response.

The direct action we took included:

- Advertising within the local community for volunteers who could help us.
- Partnering with Leeds City Council and Doing Good Leeds for Covid-19 Volunteers who could support us as part of the national effort.
- 6 of our staff members worked remotely during the first lock down.
- We extended our hours to work Saturdays and Bank Holidays.
- We set up a Phone Buddy scheme so every OPAL member had a regular contact to make sure they were ok, knew how to access support and also had some social contact. This highly successful scheme branched into a door-step and strolling-buddy project in addition to the continuation of the phone buddy project. The total of which resulted in an excess of 800 individuals being supported.
- Set up a Shopping Buddy scheme matching 79 vulnerable people with volunteers to do food shopping whilst they were isolated.
- Started our jigsaw, book, puzzle book and knitting library with home delivery.
- Information letters were posted to OPAL members to keep them updated with changes and to provide them with useful information such as details of shops delivering food and projects we were running to help.

Covid-19 Response continued

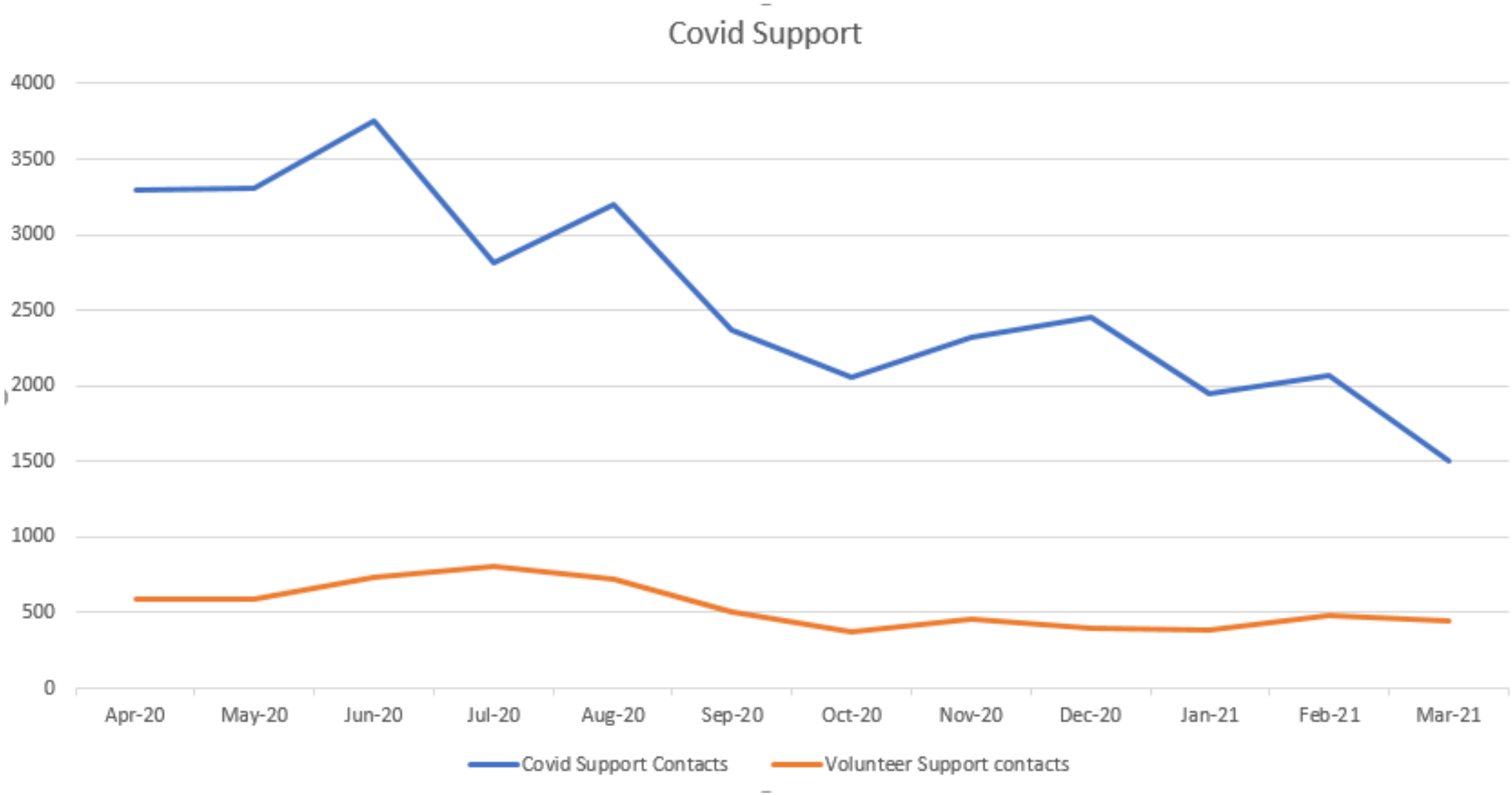
- We received IPads and Alexas from Leeds Libraries which we then loaned to isolated older people. We quickly identified a need for digital support and so recruited digital volunteers to support these individuals.
- We sourced funding to enable us to recruit a Digital Support Worker and funding to enable us to buy further iPads to loan to members who were without internet or devices.
- We designed and distributed 12,000 leaflets to the whole community twice during lockdown (using many of our newly recruited volunteers) to let them know how to get support if they needed it.
- We started up a hot meal home delivery service for our lunch club groups and other older/vulnerable people.
- We also collated and shared useful information such as details of shops that would take orders over the phone and deliver to the doorstep.
- We set up a fortnightly email update full of information about support OPAL could provide but also information about useful services, activities to do and information on the latest government guidelines.
- We set up Zoom social groups to replace the face to face groups that were on pause during lockdown.
- With each change of Government guidance, we reacted within 24hrs to either deliver activities and services remotely or face to face.
- Welcome In Community Centre was made Covid secure meaning that essential services such as Money Buddies were able to deliver their service from the Centre.
- Christmas gifts and hampers were delivered to every OPAL member and vulnerable person we were in contact with who wanted to receive one.









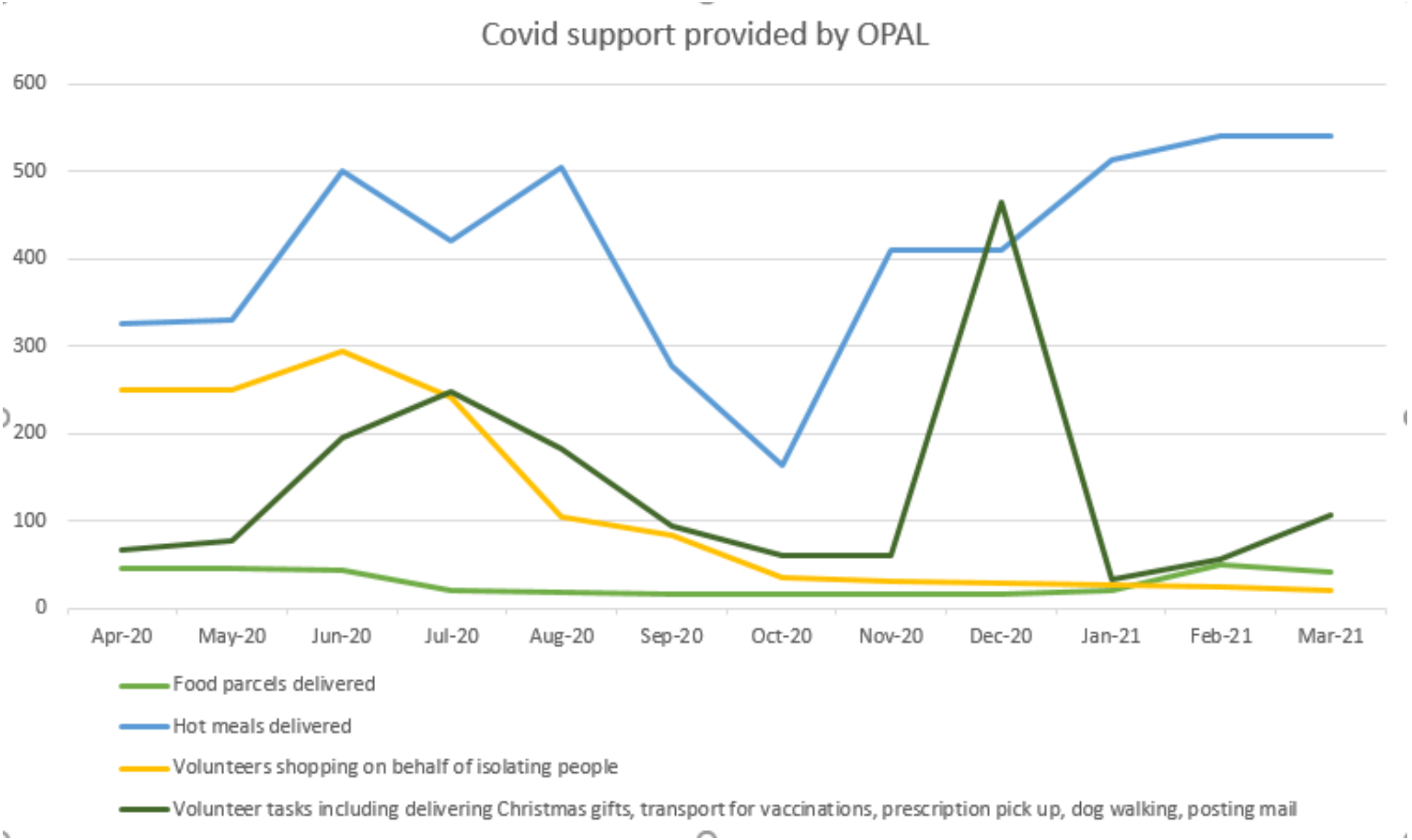


22,689
Welfare phone calls made

31,101
Covid Support Contacts

12,000
leaflets delivered on two occasions within LS16 area

4938
Hot meals cooked and delivered


Covid support provided by OPAL
600
500
400
300
200
100
0
Apr-20
May-20
Jun-20
Jul-20
Aug-20
Sep-20
Oct-20
Nov-20
Dec-20
Jan-21
Feb-21
Mar-21
Food parcels delivered
Hot meals delivered
Volunteers shopping on behalf of isolating people
Volunteer tasks including delivering Christmas gifts, transport for vaccinations, prescription pick up, dog walking, posting mail

Some OPAL Activities—adapted for Covid restrictions



Dance On Group take advantage of the sunshine and the relaxing of rules allowing people to exercise outside



A socially distanced Christmas dinner

Ralph Thoresby high school and Mitie provided 150 beautifully wrapped hampers whilst local residents donated many other gifts. As a result, 422 members accepted the offer of a Christmas gift or hamper which were delivered by volunteers, who also took the opportunity to have an often very much appreciated chat.





Rain, hail, sunshine or snow, our amazing volunteers delivered hot meals





Socially distanced gardening and litter picking days



Zoom social group

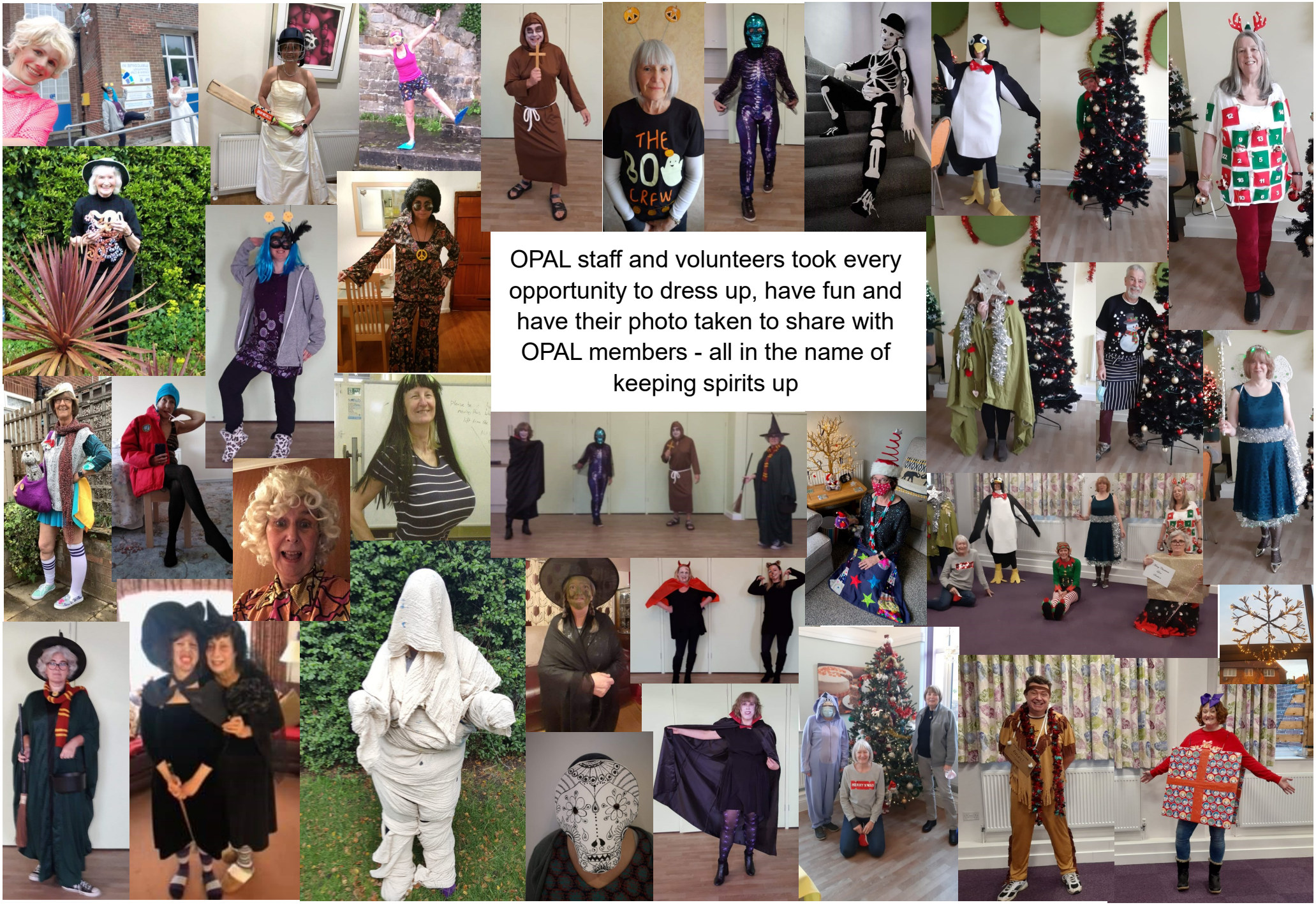


Socially distanced lunch club with a visit from one of our friendly PCSO's

One to one digital support lessons

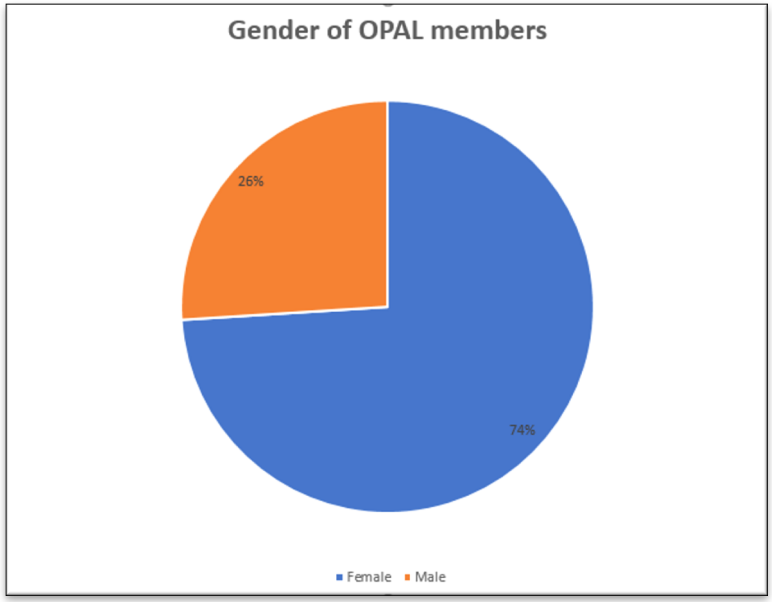


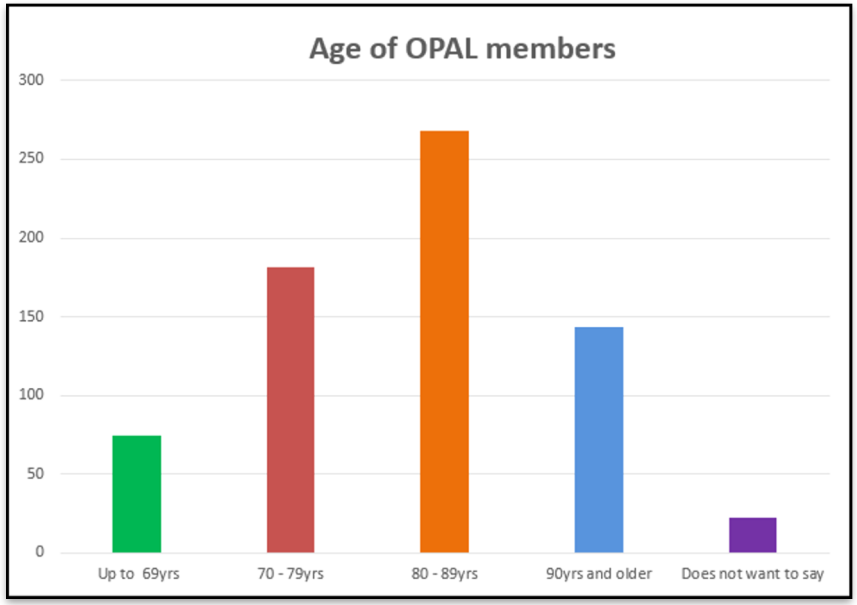
4 volunteers made doorstep visits on Christmas day to 4 members who would otherwise have seen nobody on Christmas day.

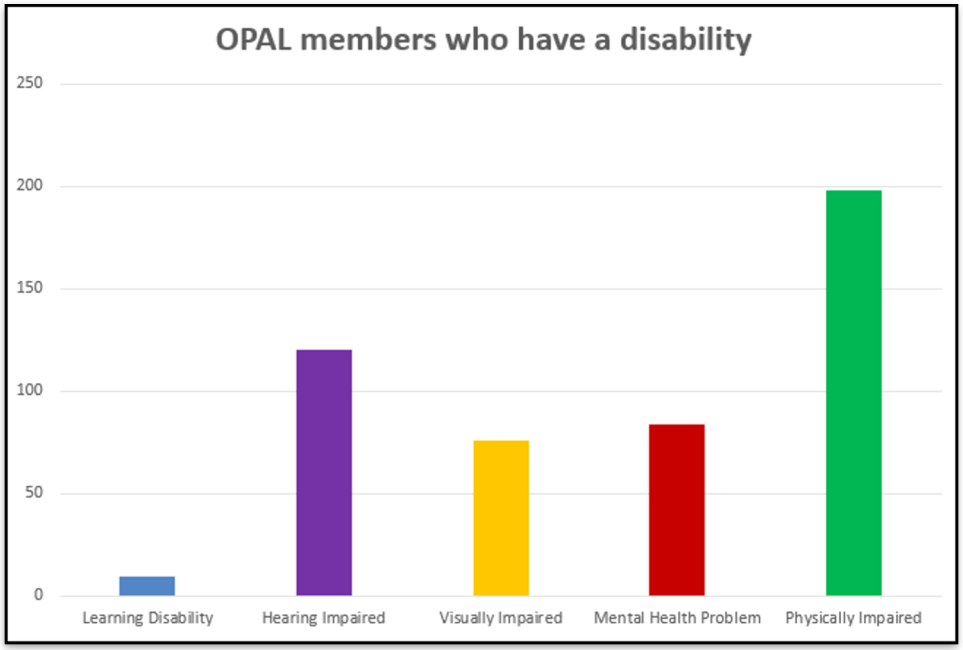


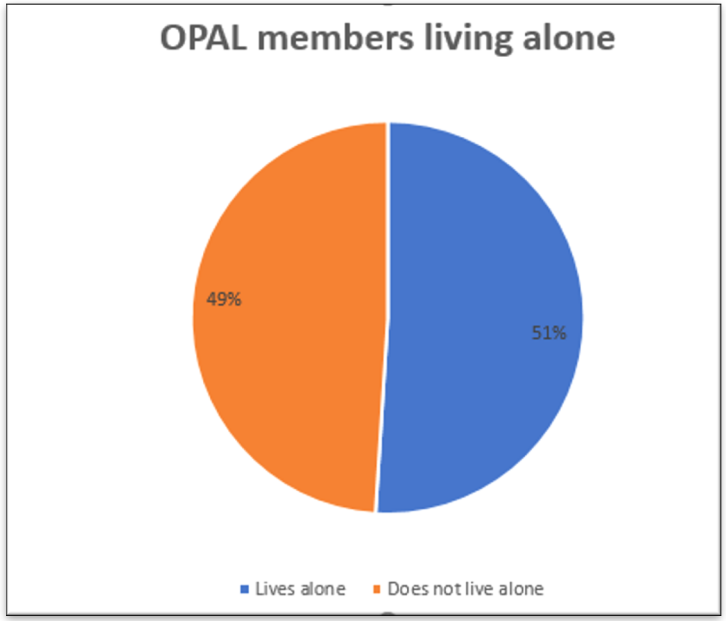
OPAL staff and volunteers took every opportunity to dress up, have fun and have their photo taken to share with OPAL members - all in the name of keeping spirits up

OPAL Members - some statistics









Andrew Guile
Angela Simmonds
Ann Whilding
Candy Winteler
Carol Cowell
Carol Lee
Carol Mottershead
Carol Thorogood
Catherine Birkby
Chelsea Clapham
Chris Whitley
Christine Barker
Christine Blomfield
Connie Cluderay
David Armitage
Debbie Smith
Diane Harron
Diane Vida
Doris Cheetham
Doris Stobbs
Edwina Gerry
Elaine Webster
Elizabeth Beetham
Geoffrey Ternent
Geraldine Fisher
Geraldine Millea
Grace Clark
Graeme Smith
Hazel Gill
Howard Marshall
Ian Rowley
Jane Baylis
Janet Poynting
Javad Moaiandin
Jean Buckley
Jean Gosling
Jean Sturgess
Jill Calderwood
Jill Howden
Joan Armitage

THANK YOU SO MUCH TO OUR FABULOUS VOLUNTEER TEAM.

We have received help and support from many more people than listed here including hundreds of local residents who helped us throughout lockdown by delivering leaflets, delivering meals, becoming shopping buddies and/or phone buddies and so much more.

We haven't named everyone for GDPR reasons but if you were one of those volunteers, please accept our heartfelt thanks.

Joan Watson
John Marlow
John Sutcliffe
Joyce Aggett
Kath Haley
Kath Rolls
Katherine Oxby
Kirstie Lewis
Laura Nolan
Lesley-Ann Kane
Linda Gibson
Linda Paynter
Lisa Argyle
Liz Huby
Louise Tanner
Lynne Mawson
Mandy Simpson
Marian Wilde
Margaret Wood
Marie Tate
Martin Housley
Martin Sellens
Maureen Macrae
Natalie Smith
Pam Nichol
Pat Richardson
Paul Fisher
Paul Fletcher
Pauline Drury
Paul Mawson
Peter Ellis
Peter Scholefield
Phil Norflok
Rita Joy
Rita Savage
Rowan Ackroyd
Ruth Cook
Sally Norfolk
Sandra Curtis
Shirley Brown
Sheila Flynn
Sheila Wood
Stefan Galek
Susan Ditchfield
Tony Barker
Tracey Kean
Val Banks

A selection from the numerous comments and compliments we received:

An OPAL member thanked us for the loan of the iPad telling us how grateful she is for the use of it. She has been emailing family members, using Zoom to access support groups and putting on good dance music to have an exhilarating dance session and exercising with Jo Wicks. She told us the support from OPAL and the loan of the iPad really lifts the spirits.

A member was very grateful to his phone buddy. He says she is absolutely amazing and has made all the difference. He is coping with his wife whose dementia is advancing quickly, he felt they had been forgotten by the NHS but he says his befriender arranged for the district nurses to attend.

Thank you for the thought, preparation and organisation that goes into these Fortnightly Updates. As I am 100% vulnerable and post op it isn't possible to come out to anything but they make lively and interesting reading. OPAL member.

A members' comment about OPAL's meal delivery service: "Absolutely marvellous, great wonderful excellent, especially the chicken. Not disliked anything, delivered hot and a great service from Driver 1 who delivers each week."

OPAL sourced an old fashioned typewriter for a member. She said it was the best thing that has happened to her this year.

OPAL's Zoom Social: 'We had a real giggle singing today, dealing with the time lag due to Zoom, so for the final songs the group suggested recording it so we can have a laugh at it in the future. There were so many belly laughs happening.

It's been amazing to join in meetings and see family. It's kept me occupied and that's been really good. Both me and my husband are using it for family meetings and Zoom quizzes as only had phone contact before. We've not seen our granddaughter since before lockdown and when we saw each other on the iPad for the first time we didn't know what to say to each other, we just looked and smiled. With the iPad we now see our grandsons every day too.

It was a great treat to receive my hamper this morning and I have sent a message to Ralph Thorsby School to thank them for putting them together so beautifully. I will be 80 in 4 months' time but I had not really felt my age until recently – I think it was when Covid kicked in and we suddenly found ourselves labelled 'old and vulnerable' that really made me realise I was now definitely an old person! Anyway, many thanks to you all for helping to spread some good cheer at this time.

OPAL member who received a Christmas hamper said it was lovely to receive something somebody had done for her and that she was filling up with tears.

Comments and compliments continued…

Thank you so much for the hamper it was wonderful. Even the bag it came in will come in useful

I would like to thank you very much for the range of work you are doing at OPAL and particularly for the newsletter. In these difficult times of Covid it has been like a beacon – informative and positive. It is actually something to look forward to, unlike most other things!

It has been lovely having my volunteer, he phones for my shopping list and we have a nice chat, then another chat when he delivers my shopping. It really brightens my day. If I run out of anything between shops he will get them for me, so kind.

I really can't praise my volunteer enough. She is kind, helpful and always cheers me up. We have become friends and I hope we can still keep in contact when all this is over. I know she is going back to work soon, but says we can still have telephone chats, or occasional visits.

Nothing is too much trouble, my volunteer has collected prescriptions, posted letters, and lots of other little things, as well as doing my shopping. I don't know what I would have done without him. Thank you OPAL for sending him, and for all your hard work.

I am really enjoying my volunteering it makes me feel useful at this difficult time

I'm pleased to be able to help an organisation that is doing so much good work for the community

I visited gentleman who is nearly 100 years old, who lives alone, has a hearing impairment, and although he has a hearing aid, he struggles to understand conversation over the phone. I sat in his garden whilst he talked to me through an open door in his conservatory. His family live in another part of the country. I have known this gentleman for over a year, supporting him to engage in various activities at OPAL, prior to COVID - 19. I know a lot about his life and family, so was able to have a stimulating and meaningful conversation with him. It was great to see him smile and laugh and he said "I haven't had a conversation like this for a number of months, and I really appreciate it". I was able to tell him about what was happening in the outside world, and whilst he was somewhat shocked about how restricted life was, he was grateful to have a level of awareness of the impact of the pandemic, as he has been very cut off from day to day life. On a practical level, I was able to support him in a number of ways such as giving advice on his telecare pendant which he kept setting off inadvertently, contact BID to get him help with his hearing aid, and ideas to help alleviate the boredom.

OPAL member thanked us for everything we have done this year, especially the support we have given during the pandemic and for her hamper, the contents of which were perfect.

Treasurer's Report



At the start of the year all of our self generated income from the café, OPAL activities and room hire had all stopped. We were unable to deliver face to face services but the need for OPAL's support was more critical than ever. It was a challenging time and we are very grateful to the funders who approached us during the very early phase of Covid to offer their support and who allowed us to redirect their funds already committed to OPAL activities towards our delivering Covid support. We are also very grateful to the many individuals and groups who donated to OPAL.

As the year progressed we completed many funding applications seeking financial support and were very fortunate to be successful with a number of these. This meant the staff team could focus on service delivery without worrying about whether OPAL would be financially viable by the end of the year. We also managed to source the final bit of funding needed to complete the renovation of the Heather Room which meant the renovation of the Welcome in Community Building was finally complete. As soon as lockdown restrictions eased and contractors could work (July 2020), the work commenced. Although our short to medium term future was financially secure, OPAL have been concerned about our longer term future. Funders will inevitable have more demands on their resources and we felt it was necessary to make ourselves as self sustainable as possible. With this in mind, we successfully applied for funding to employ a Café Development Manager. We anticipated the café being reopened in March 2021 but unfortunately, Covid restrictions interfered with the opening date. I look forward to reporting in next financial year as to the developments we have made as a result of this new role.

Financial Review: The net income for the year was £168,038 including net income of £118,444 on unrestricted funds and net income of £49,594 on restricted funds after transfers.

Reserves policy: The charity's free reserves, excluding fixed assets, at the year end were £153,399. The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the charity, which equates to between £92,404 and £161,708. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors. In order to ensure our future security, we have prepared a budget and cashflow for the next two years. We have minimised costs wherever possible and are taking action to maximise income through as many income streams as possible.

We are very fortunate to have support from Leeds City Council who awarded us a 5 year grant in 2019 which funds 25% of our annual turnover. This funding means we have the foundations to build on for a stable and effective service. That said, it is a never ending challenge to find the funds to plug the gaps and we are incredibly grateful to all those who have supported us financially—big and small!

Howard Marshall, Treasurer



Funders of grants are listed below and we are incredibly grateful for their generous support. We also recognise and appreciate the many individuals and small groups such as Calverley and Aireborough Rotary Clubs, Cookridge Crumpets and Bramhope Trust who donated their time and/or money to us as well as those who fundraised on behalf OPAL. Thank you

LCC ABCD	£27,000	To deliver ABCD project
LCC ASC grant	£88,806	For OPAL's work supporting older people
Harrison Potter Trust	£7,406	Digital inclusion project
Bernard Sunley Foundation	£5,000	Towards the renovation of the Heather room
Big Lottery	£6,281	Covid-19 support for vulnerable and older people
Clothworkers Foundation	£25,000	Towards the renovation of the Heather room
Co-op	£4,873	To improve the grounds
HMRC CJRS	£1,861	Funding towards employment costs during periods of inactivity
Edward Gostling Foundation	£5,000	Towards the renovation of the Heather room
Independent Age	£10,000	Towards salary associated costs for Covid relief
LCC Community Hubs	£14,000	Engagement with Covid-19 Hub Network across Leeds
LCC Covid grants	£41,750	For costs of Covid relief
LCC Digital	£1,000	Digital support
LCC Inner Area Comm.	£7,414	Towards the renovation of the Heather room
LOPF	£7,000	For costs of meal deliveries
MICE	£1,200	Purchase of hampers
Outer NW HAP	£6,991	Towards the renovation of the Heather room
Power to Change - IT and Café	£25,500	Development of the café, website and database
Power to Change - renovation	£15,000	Towards the renovation of the Heather room
Power to Change -emergency Covid support	£17,000	Covid response
SWIFT	£37,500	Funding from Public Health for the SWIFt project

Office:

Welcome In Community Centre
55 Bedford Drive,
LS16 6DJ
Telephone: 0113 2619103

Email: admin@opal-project.org.uk

www.opal-project.org.uk

Twitter@OPALLeeds16

Facebook: Older People's Action in the Locality

Instagram@OPALLeeds16

The Committee:

Peter Ellis, Chairman
Howard Marshall, Treasurer
Elizabeth Locke
Martin Sellens
Chris Hindle
Grace Clark
Gary Hartley
Jennifer Ward

Advisors to Committee
Cllr Barry Anderson

<u>Left during 2020/2021</u>
Lesley Hastings





Staff:

Ailsa Rhodes	*CEO*
Sally-Anne Notley	*Deputy Manager*
Bev Fletcher	*SWIFt Project Worker*
Shelley Clark	*Project Worker*
Gail Place	*Café Worker*
Mandy Mawson	*Project Worker*

<u>Started during 2020/2021</u>

Steve Hogg	*Digital Support Wkr*
Nikki Sloper	*Café Development Mgr*
Ellen Stoker	*Community Builder*

<u>Left during 2020/2021</u>

Rowan Ackroyd	*Project Worker*
Johanna Mawson	*Community Builder*
Anne Sellens	*Project Worker*
Jennifer Ward	*Project Worker*


Leeds
CITY COUNCIL

power to
change
business in
community
hands

Key Fund
Growing Enterprise in Communities

EUROPEAN UNION

Older People's Action in the Locality

Charity number 1131792

A company limited by guarantee number 06961204

Annual Report and Financial Statements

for the year ended 31 March 2021

OPAL

OLDER PEOPLE'S
ACTION IN THE LOCALITY

COMMUNITY ACCOUNTING WYCAS

West Yorkshire Community Accounting Service

Older People's Action in the Locality

Annual Report and Financial Statements

for the year ended 31 March 2021

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Examiner's report	5
Statement of financial activities	6
Balance sheet	7
Notes to the accounts	8 to 15

Prepared by West Yorkshire Community Accounting Service

Older People's Action in the Locality

Trustees' report for the year ended 31 March 2021

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
Peter Ellis	Chair	
Martin Sellens	Deputy Chair	
Howard Marshall	Treasurer	
Grace Clark		
Gary Hartley		Appointed January 2021
Lesley Hastings		Resigned January 2021
Christopher Hindle		
Elizabeth Locke		
Jennifer Ward		Appointed March 2021

Company secretary	Ailsa Rhodes
Charity number	1131792 Registered in England and Wales
Company number	06961204 Registered in England and Wales

Registered and principal address
Welcome In Community Centre
55 Bedford Drive
Leeds
LS16 6DJ

Bankers
National Westminster Bank
491 Otley Road
Leeds
LS16 7YB

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

Independent examiner
Simon Bostrom FCIE
West Yorkshire Community Accounting Service
Stringer House
34 Lupton Street
Leeds
LS10 2QW

Structure, governance and management

The charity is a company limited by guarantee and was formed on 14 July 2009. It is governed by a memorandum and articles of association as amended 18 June 2020. The liability of the members in the event of the company being wound up is limited to a sum not exceeding £1.

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.

Objectives and activities

The charity's objects

The objects are to further or benefit the residents of Cookridge, Holt Park, Ireland Wood, Tinshill, Adel and Bramhope (most of the Leeds 16 postcode) and surrounding areas, particularly but not exclusively for the elderly, without distinction of sex, sexual orientation, race or of political, religious or other opinions by associating together the said residents and the local authorities, voluntary and other organisations in a common effort to advance education and to provide facilities in the interests of social welfare for recreation and leisure time occupation with the objective of improving the conditions of life for the residents and to strengthen the local communities in which they live.

The charity's main activities

OPAL reduces social isolation and promotes the wellbeing of older people so that they can live independently in their own homes. We do this by offering opportunities for healthy living and social activities, practical support and an information service.

OPAL is based in and manages the Welcome In Community Centre and Community Cafe. The Centre and Cafe is a facility for all the community and provides a source of revenue for OPAL as well as providing opportunity for integration of older people with the wider community.

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 the health and wellbeing of older people.

Achievements and performance

In this last year, OPAL has been a Covid Volunteer Hub providing support to the wider community including emergency food parcels, picking up prescriptions and transport to appointments and vaccinations. We have recruited extra volunteers to help with this as well as to take on roles such as shopping and phone buddies and delivering information leaflets.

We have continued to support older people in the community and transformed our service to provide remote support. We have delivered hot meals 5 days a week, provided emotional support and wherever possible practical support. Our role as community anchor has been fundamental for the LS16 community throughout the pandemic.

Financial review

The net income for the year was £168,038, including net income of £118,444 on unrestricted funds and net income of £49,594 on restricted funds after transfers.

Reserves policy

The charity's free reserves, excluding fixed assets, at the year end were £153,399.

The Trustees of the Charity have established a reserves policy whereby free reserves held by the charity should be within the range of four and seven months of the resources expended in the operation of the charity, which equates to between £92,404 and £161,708. At this level, the Trustees feel that they would be able to honour their commitments to staff and creditors.

We have prepared a budget and cashflow for the next two years. We have minimised costs wherever possible and are taking action to maximise income through as many income streams as possible.

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.

Signed on behalf of the board of trustees on 4/10/2021

Grace Clark (Trustee)

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2021, which are set out on pages 6 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
Since the charitable company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a member of ACIE which is one of the listed bodies.

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.

Simon Bostrom FCIE

4/10/2021

West Yorkshire Community Accounting Service
Stringer House
34 Lupton Street
Leeds
LS10 2QW

Older People's Action in the Locality

Statement of Financial Activities

(including summary income and expenditure account)

for the year ended 31 March 2021

	Notes	2021 Unrestricted funds £	2021 Restricted funds £	2021 Total funds £	2020 Total funds £
Income from:					
Grants and donations	(2)	40,414	355,582	395,996	216,738
Fees and charges		33,344	-	33,344	86,324
Memberships		3,617	-	3,617	7,881
Fundraising		4,510	-	4,510	9,815
Bank interest		1,303	-	1,303	1,895
Other income		6,574	-	6,574	5
Total income		89,762	355,582	445,344	322,658
Expenditure on:					
Salaries and NIC	(3)	-	157,997	157,997	150,000
Payroll costs		-	1,604	1,604	1,556
Staff travel expenses		52	40	92	1,734
Training		-	662	662	722
Volunteer expenses and training		10	52	62	504
Events and activities		12,586	22,748	35,334	60,071
Equipment and materials		-	344	344	3,331
Premises costs		158	13,118	13,276	21,658
Phone, postage and internet		-	5,845	5,845	4,576
Computers and IT		40	6,558	6,598	3,000
Printing and stationery		483	3,538	4,021	2,569
Memberships and subscriptions		1,465	997	2,462	782
Insurance		-	4,660	4,660	4,518
Hospitality and sundry costs		201	282	483	117
Governance costs		141	-	141	313
Independent examination		84	1,296	1,380	1,380
Legal and professional		-	709	709	401
Repairs and maintenance		-	7,661	7,661	7,722
Depreciation		32,984	-	32,984	24,318
Loan interest		991	-	991	975
Grant repayment		-	-	-	1,289
Total expenditure		49,195	228,111	277,306	291,536
Net income / (expenditure)		40,567	127,471	168,038	31,122
Transfers between funds	(4)	77,877	(77,877)	-	-
Net movement in funds		118,444	49,594	168,038	31,122
Fund balances brought forward		619,663	42,838	662,501	631,379
Fund balances carried forward	(4)	738,107	92,432	830,539	662,501

All incoming resources and resources expended derive from continuing activities.

Older People's Action in the Locality

Balance sheet

as at 31 March 2021

		2021 Unrestricted £	2021 Restricted £	2021 Total £	2020 Total £
Fixed assets					
Tangible assets	(5)	584,708	-	584,708	501,876
Total fixed assets		584,708	-	584,708	501,876
Current assets					
Debtors and prepayments	(6)	2,500	1,442	3,942	5,318
Cash at bank and in hand	(7)	187,362	90,990	278,352	157,312
Total current assets		189,862	92,432	282,294	162,630
Current liabilities: amounts falling due within one year					
Creditors and accruals	(8)	8,809	-	8,809	2,005
Total current liabilities		8,809	-	8,809	2,005
Net current assets / (liabilities)		181,053	92,432	273,485	160,625
Total assets less current liabilities		765,761	92,432	858,193	662,501
Creditors: amounts falling due after one yr.	(9)	27,654	-	27,654	-
Net assets		738,107	92,432	830,539	662,501
Funds					
Unrestricted funds		738,107	-	738,107	619,663
Restricted funds		-	92,432	92,432	42,838
Total funds		738,107	92,432	830,539	662,501

For the year ending 31 March 2021 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 4/10/2021

Grace Clark (Trustee)

Older People's Action in the Locality

Notes to the accounts

for the year ended 31 March 2021

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.

Tangible fixed assets

Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition. Gifted assets are shown at the value to the charity on receipt.
Depreciation is provided on all tangible fixed assets at rates calculated to write off the cost on a straight line basis over their expected useful economic lives as follows:
Fixtures and equipment: over 5 years
Leasehold improvements: over the life of the lease

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.

1 Accounting policies continued

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.

Leases

Rents under operating leases are charged on a straight line basis over the lease term or to an earlier date if the lease can be determined without financial penalty.

2 Grants and donations

	2021 Unrestricted funds £	2021 Restricted funds £	2021 Total funds £	2020 Total funds £
National Lottery Community Fund	-	6,281	6,281	-
Brelms Trust	-	-	-	3,440
CAF for Carers	350	-	350	5,026
Charles Brotherton Trust	-	-	-	200
Clothworkers Foundation	-	25,000	25,000	-
Community Foundation lunch club	-	-	-	3,780
Co-op Foundation	-	4,873	4,873	60
HMRC Coronavirus Job Retention Scheme (CJRS)		1,861	1,861	-
Edward Gostling Foundation	-	5,000	5,000	-
Harrison and Potter Trust	-	7,406	7,406	4,301
Independent Age	-	10,000	10,000	-
Leeds Benevolent Society for Single Ladies	-	-	-	1,000
Leeds City Council (LCC)	14,000	172,356	186,356	137,458
Leeds Community Foundation	-	-	-	1,150
Leeds Convalescent Society	-	-	-	350
Leeds Inner NW Housing Panel	-	7,414	7,414	-
Leeds Older Peoples Forum (LOPF)	-	7,000	7,000	1,500
Leeds Outer NW Housing Panel	-	6,991	6,991	-
Liz and Terry Bramhall	-	-	-	5,000
LCC MICE grants	-	1,200	1,200	-
Moor Allerton	1,000	-	1,000	-
Power to Change	-	57,500	57,500	-
Sir George Martin Trust	-	-	-	2,516
St Chads Church	-	-	-	2,000
The Bernard Sunley Charitable Foundation	-	5,000	5,000	-
Time to Shine	-	37,500	37,500	22,500
Wades Charity	-	-	-	1,900
Windmill Community Transport Trust Fund	-	-	-	2,000
Other grants and donations (including gift aid)	25,064	200	25,264	22,557
	40,414	355,582	395,996	216,738

3 Staff costs and numbers

	2021 £	2020 £
Gross salaries	149,076	140,560
Social security costs	9,009	8,472
Employment allowance	(4,000)	(3,000)
Pensions	3,912	3,968
	157,997	150,000

The average number employees during the year was 10.4, being an average of 7.0 full time equivalent (2019: 9.5, 6.6 FTE). There were no employees with emoluments above £60,000.

Defined contribution pension scheme

	2021 £	2020 £
Costs of the scheme to the charity for the year	3,912	3,968
Amount of any contributions outstanding at the year end	-	-

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2021

4 **Restricted funds**	Balance b/f	Incoming	Outgoing	Transfers	Balance c/f
	£	£	£	£	£
Leeds Benevolent Society	5,608	-	5,608	-	-
Windmill Transport	830	-	830	-	-
LCC ABCD	20,522	27,000	12,472	-	35,050
LCC ASC grant	1,891	88,806	77,149	(7,180)	6,368
Brelms Trust	1,635	-	1,192	-	443
CAF for Carers	4,436	-	4,436	-	-
Harrison Potter Trust	1,059	7,406	5,410	-	3,055
LCC Small Sparks Fund	800	-	100	-	700
Liz and Terry Bramhall Fdn	5,000	-	508	(4,492)	-
Sir George Martin Trust	479	-	300	-	179
Wades Charitable Trust	578	-	-	-	578
Bernard Sunley Foundation	-	5,000	-	(5,000)	-
Big Lottery	-	6,281	6,281	-	-
Clothworkers Foundation	-	25,000	-	(25,000)	-
Co-op	-	4,873	59	-	4,814
HMRC CJRS	-	1,861	1,861	-	-
Edward Gostling Foundation	-	5,000	-	(5,000)	-
Independent Age	-	10,000	10,000	-	
LCC Community Hubs	-	14,000	14,000	-	-
LCC Covid grants	-	41,750	21,654	-	20,096
LCC Digital	-	1,000	1,000	-	-
LCC Inner Area Comm.	-	7,414	-	(7,414)	-
LOPF	-	7,000	7,000	-	-
MICE	-	1,200	1,200	-	-
Outer NW HAP	-	6,991	-	(6,991)	-
Power to Change - IT and Café	-	25,500	13,354	(1,800)	10,346
Power to Change - renovation	-	15,000	-	(15,000)	-
Power to Change - emergency	-	17,000	17,000	-	-
SWIFT	-	37,500	26,697	-	10,803
	42,838	355,582	228,111	(77,877)	92,432

Transfers relate to work to the property and associated equipment which is capitalised and which is then depreciated within unrestricted funds.

4 Restricted funds (continued)

Fund name	Purpose of restriction
Leeds Benevolent Society	Towards costs of a volunteer project
Windmill Transport	To fund the transport for day trips
LCC ABCD	To deliver ABCD project
LCC ASC grant	For OPAL's work supporting older people
Brelms Trust	For carer and men's groups
CAF for Carers	Co-op funding for carers and moving on group
Harrison Potter Trust	Digital inclusion project
LCC Small Sparks Fund	To distribute to community members for community development work
Liz and Terry Bramhall Fdn	Towards the renovation of the Bar Room
Sir George Martin Trust	For a shopping support scheme
Wades Charitable Trust	To fund chair exercise classes
Bernard Sunley Foundation	Towards the renovation of the Heather room
Big Lottery	Covid-19 support for vulnerable and older people
Clothworkers Foundation	Towards the renovation of the Heather room
Co-op	To improve the grounds
HMRC CJRS	Funding towards employment costs during periods of inactivity
Edward Gostling Foundation	Towards the renovation of the Heather room
Independent Age	Towards salary associated costs for Covid relief
LCC Community Hubs	Engagement with Covid-19 Hub Network across Leeds
LCC Covid grants	For costs of Covid relief
LCC Digital	Digital support
LCC Inner Area Comm	Towards the renovation of the Heather room
LOPF	For costs of meal deliveries
MICE	Purchase of hampers
Outer NW HAP	Towards the renovation of the Heather room
Power to Change - IT and Café	Development of the café, website and database
Power to Change - renovation	Towards the renovation of the Heather room
Power to Change - emergency	Covid response
SWIFT	Funding from Public Health until 31 March 2022

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2021

5 Tangible assets

	Leasehold property	Fixtures and equipment	Total
Cost	£	£	£
At 1 April 2020	565,884	13,891	579,775
Additions	104,629	11,187	115,816
At 31 March 2021	670,513	25,078	695,591
Depreciation			
At 1 April 2020	71,600	6,299	77,899
Charge for year	28,456	4,528	32,984
At 31 March 2021	100,056	10,827	110,883
Net book value			
At 31 March 2021	570,457	14,251	584,708
At 31 March 2020	494,284	7,592	501,876

6 Debtors and prepayments

	2021	2020
	£	£
Debtors	2,500	4,000
Prepayments	1,442	1,318
	3,942	5,318

7 Cash at bank and in hand

	2021	2020
	£	£
Cash at bank	278,362	157,140
Cash in hand	(10)	172
	278,352	157,312

8 Creditors and accruals falling due within one year

	2021	2020
	£	£
Loans	5,185	625
Income received in advance	2,244	-
Accruals	1,380	1,380
	8,809	2,005

9 Creditors and accruals falling due after one year

	2021	2020
	£	£
Loans	27,654	-
	27,654	-

9 Related party transactions

10 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.

11 Remuneration and benefits received by key management personnel

The key management personnel of the charity comprises the trustees, Chief Officer and Deputy Manager. The total employee benefits of the key management personnel were £63,678 (2020: £61,797).

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

12 Operating leases

Expected future minimum lease payments over the remaining life of the lease, analysed into the period in which the commitment falls due:	2021	2020
	£	£
Within one year	130	130
In the second to fifth years inclusive	520	520
Over five years from the balance sheet date	2,102	2,232
	2,752	2,882

Older People's Action in the Locality

Statement of Financial Activities including comparatives for all funds (including summary income and expenditure account) for the year ended 31 March 2021

	2021 Unrestricted funds £	2020 Unrestricted funds £	2021 Restricted funds £	2020 Restricted funds £	2021 Total funds £	2020 Total funds £
Income						
Grants and donations	40,414	25,307	355,582	191,431	395,996	216,738
Fees and charges	33,344	86,324	-	-	33,344	86,324
Memberships	3,617	7,881	-	-	3,617	7,881
Fundraising	4,510	9,815	-	-	4,510	9,815
Bank interest	1,303	1,895	-	-	1,303	1,895
Other income	6,574	5	-	-	6,574	5
Total income	89,762	131,227	355,582	191,431	445,344	322,658
Expenditure						
Salaries and NIC	-	21,565	157,997	128,435	157,997	150,000
Payroll costs	-	-	1,604	1,556	1,604	1,556
Staff travel expenses	52	26	40	1,708	92	1,734
Training	-	212	662	510	662	722
Volunteer expenses and training	10	68	52	436	62	504
Events and activities	12,586	44,199	22,748	15,872	35,334	60,071
Equipment and materials	-	-	344	3,331	344	3,331
Premises costs	158	4,642	13,118	17,016	13,276	21,658
Phone, postage and internet	-	160	5,845	4,416	5,845	4,576
Computers and IT	40	-	6,558	3,000	6,598	3,000
Printing and stationery	483	7	3,538	2,562	4,021	2,569
Memberships and subscriptions	1,465	20	997	762	2,462	782
Insurance	-	1,026	4,660	3,492	4,660	4,518
Hospitality and sundry costs	201	32	282	85	483	117
Governance costs	141	159	-	154	141	313
Independent examination	84	-	1,296	1,380	1,380	1,380
Legal and professional	-	50	709	351	709	401
Repairs and maintenance	-	362	7,661	7,360	7,661	7,722
Depreciation	32,984	24,318	-	-	32,984	24,318
Loan interest	991	975	-	-	991	975
Grant repayment	-	-	-	1,289	-	1,289
Total expenditure	49,195	97,821	228,111	193,715	277,306	291,536
Net income / (expenditure)	40,567	33,406	127,471	(2,284)	168,038	31,122
Transfers between funds	77,877	54,289	(77,877)	(54,289)	-	-
Net movement in funds	118,444	87,695	49,594	(56,573)	168,038	31,122
Fund balances brought forward	619,663	531,968	42,838	99,411	662,501	631,379
Fund balances carried forward	738,107	619,663	92,432	42,838	830,539	662,501

Older People's Action in the Locality

Independent examiner's report to the trustees of Older People's Action in the Locality

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2021, which are set out on pages 6 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
Since the charitable company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act.

I confirm that I am qualified to undertake the examination because I am a member of ACIE which is one of the listed bodies.

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.

Signed:  Name: Simon Bostrom FCIE

4/10/2021

West Yorkshire Community Accounting Service
Stringer House
34 Lupton Street
Leeds
LS10 2QW