

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)

Contents

Welcome from the Chairman	4
CEO's report	5
Covid-19 Response	6-7
Covid Support	8-9
OPAL Activities—adapted for Covid	10
Making people smile	11
OPAL Members—some statistics	12
OPAL Volunteers	13
Comments and compliments	14-15
Treasurers Report	16-17
Contact details	18

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.

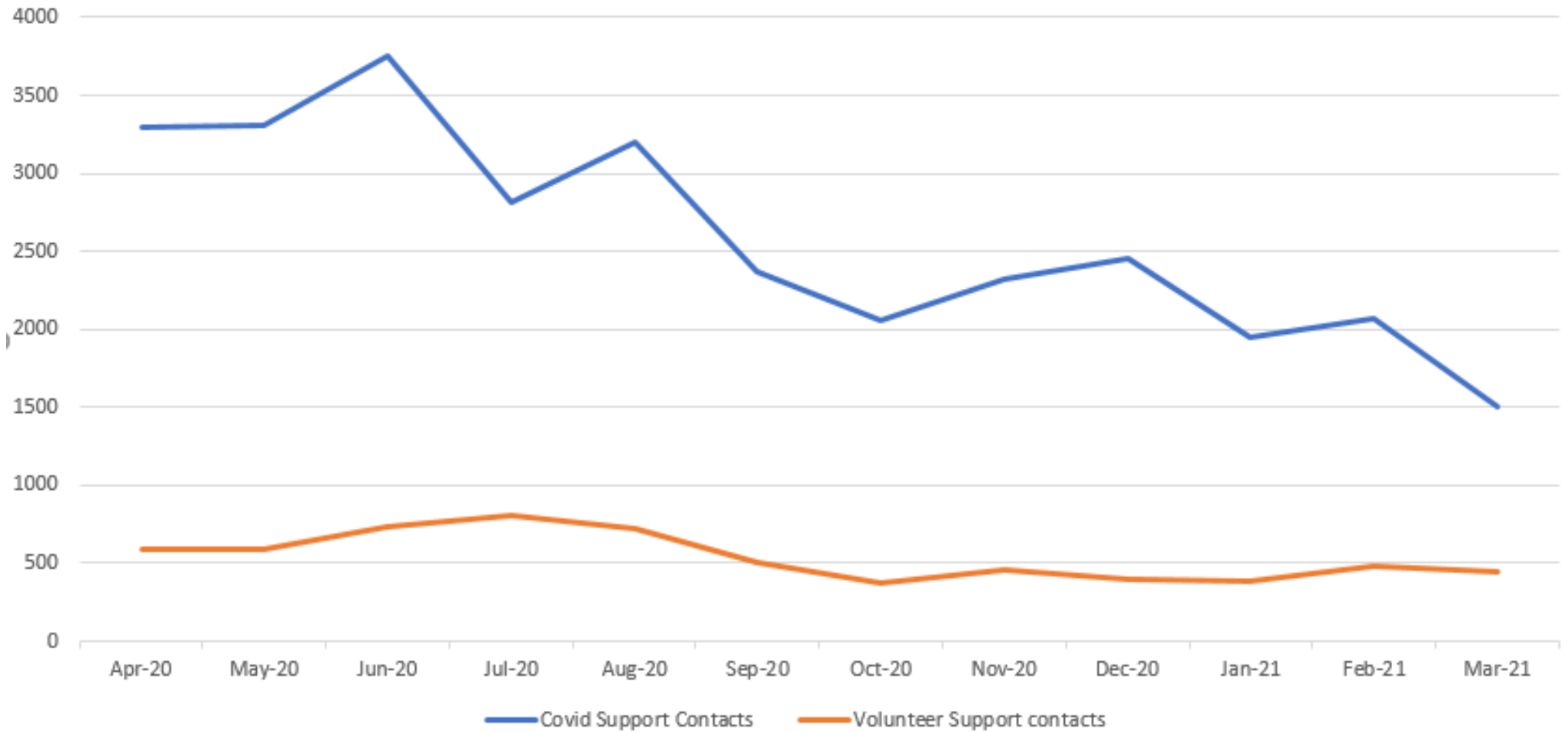


Covid-19 Response continued

- 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.



Covid Support



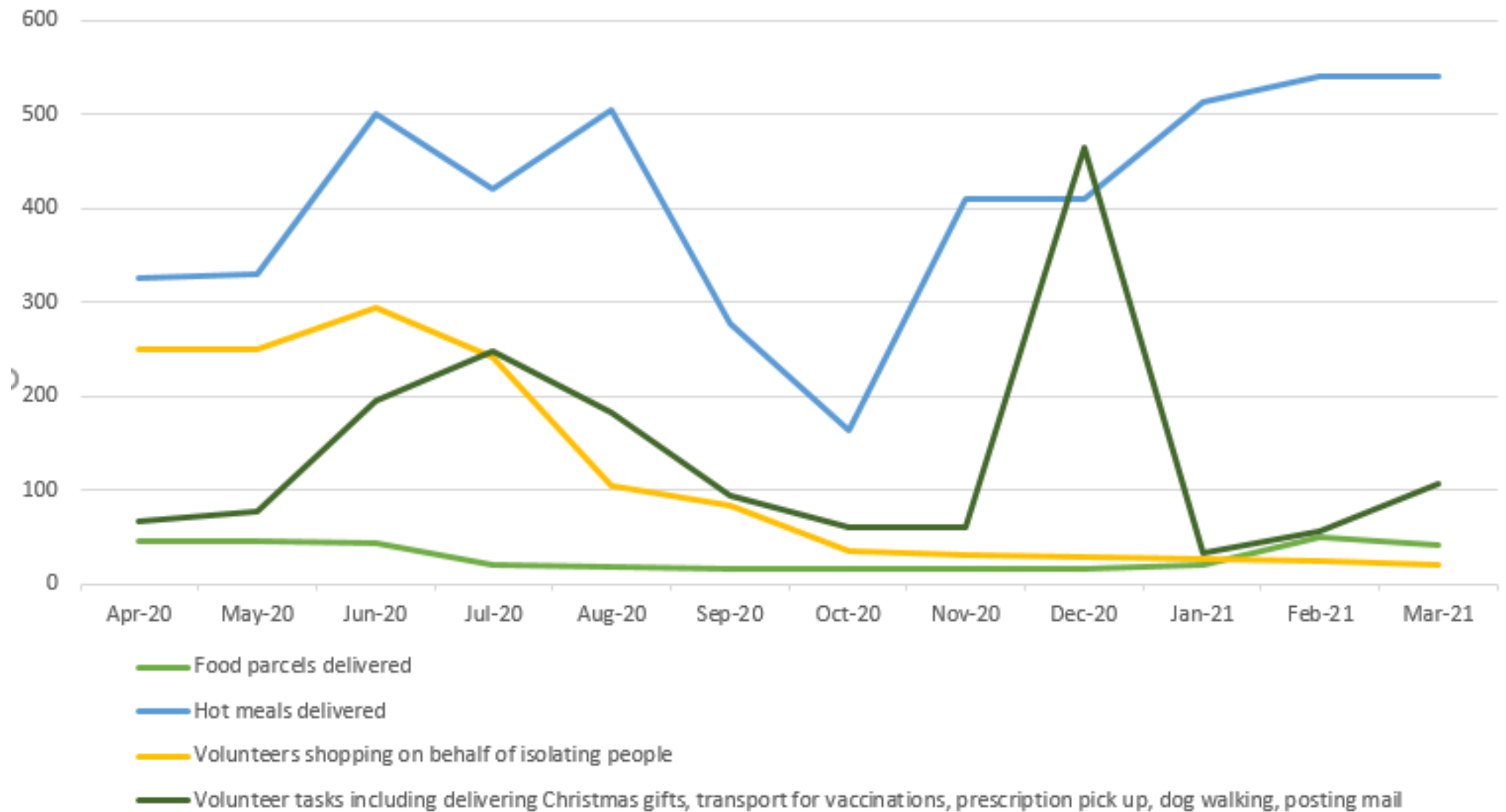
22,689
Welfare phone
calls made

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



Some OPAL Activities—adapted for Covid restrictions

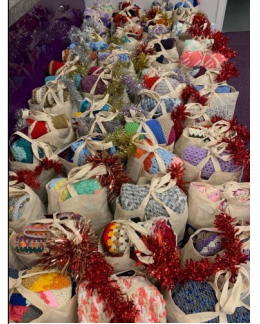


Dance On Group take advantage of the sunshine and the relaxing of rules allowing people to exercise outside



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

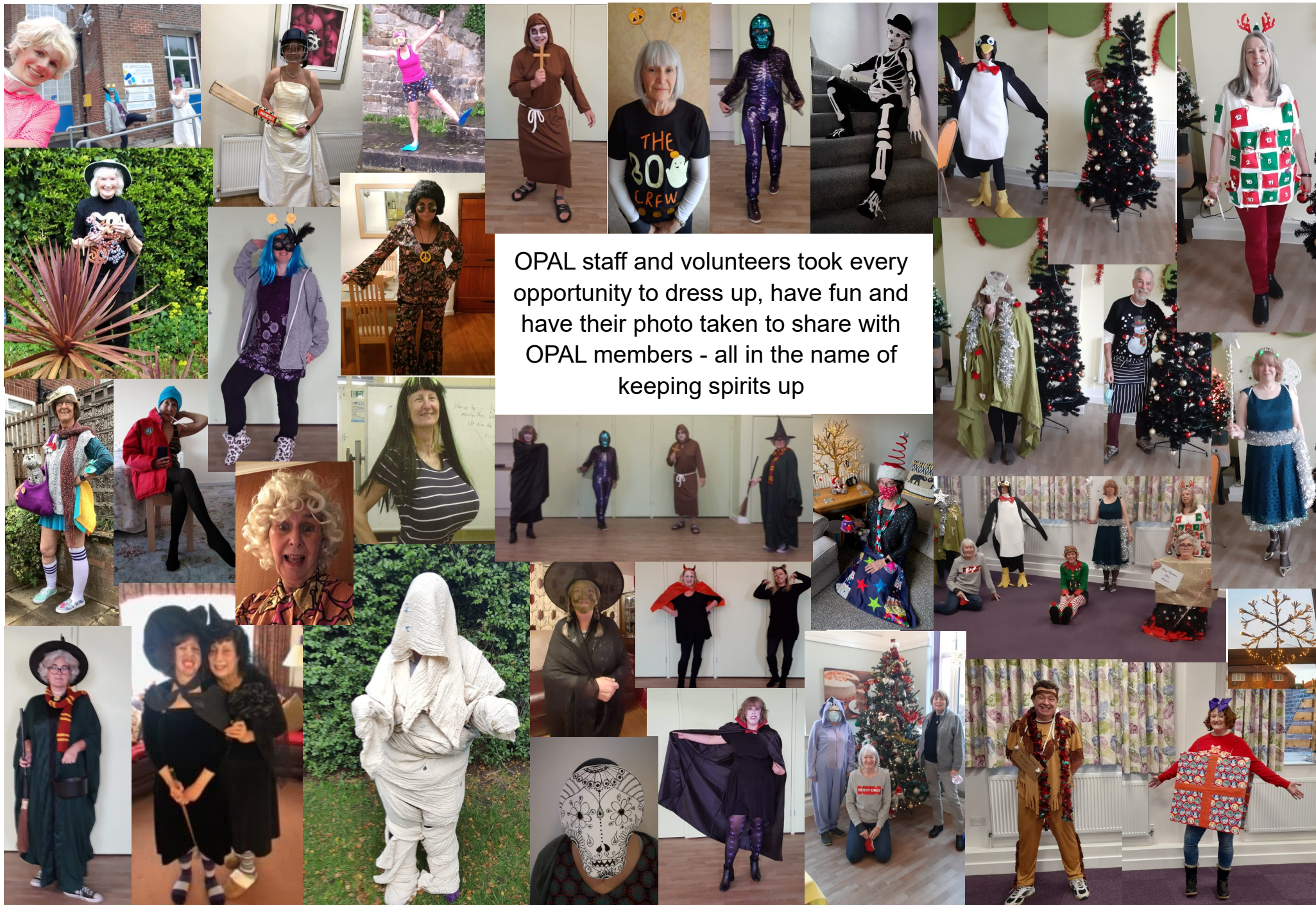


Socially distanced lunch club with a visit from one of our friendly PCSO's

One to one digital support lessons

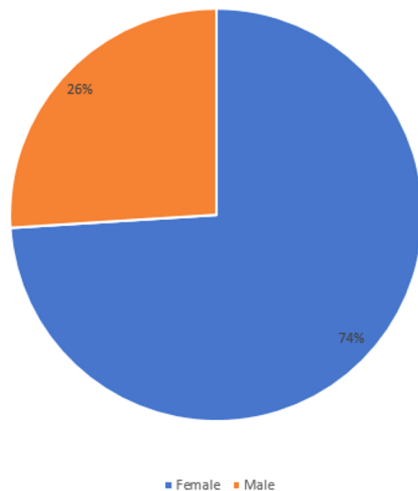


4 volunteers made doorstep visits on Christmas day to 4 members who would otherwise have seen nobody on Christmas day.

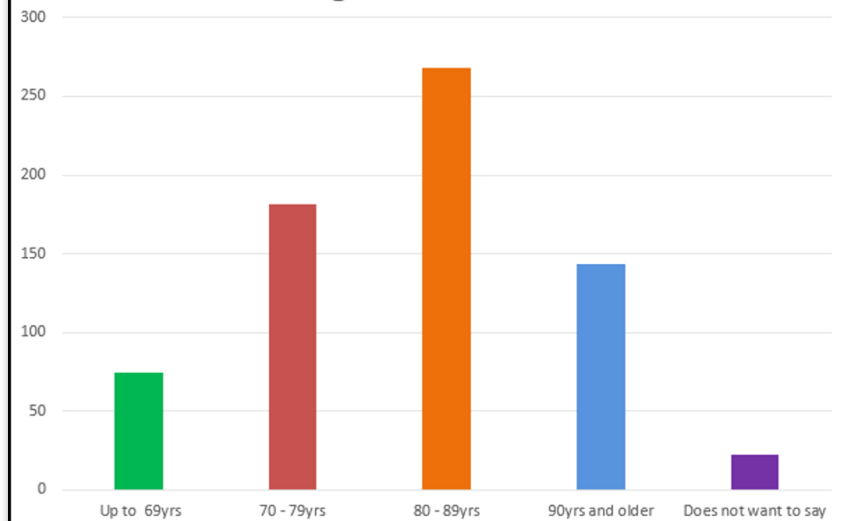


OPAL Members - some statistics

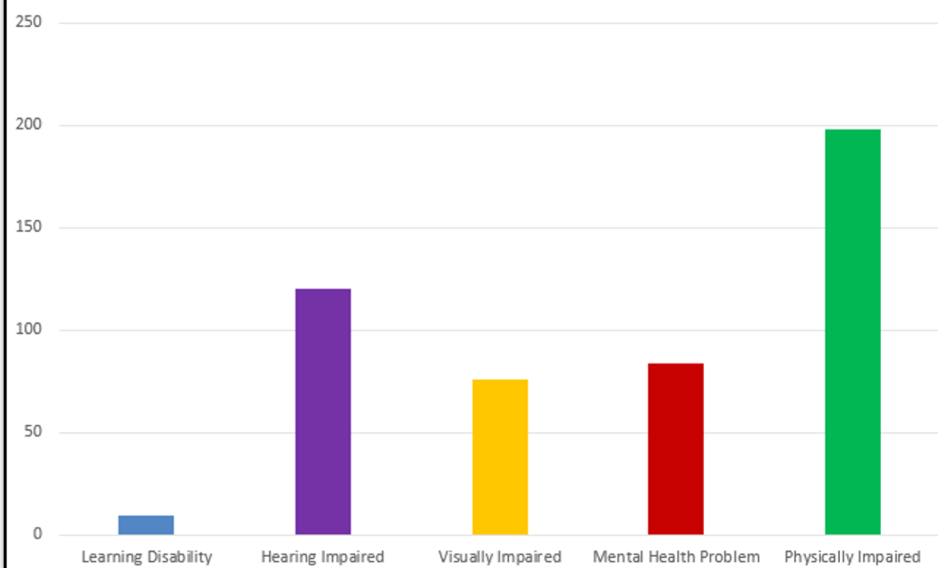
Gender of OPAL members



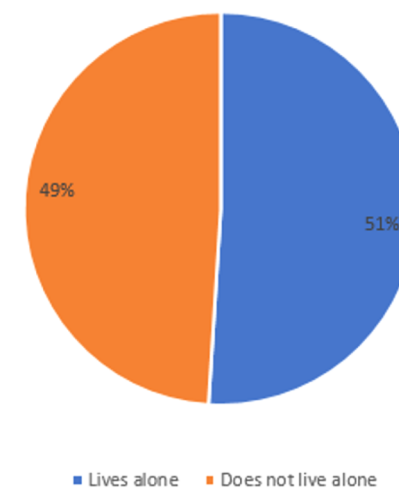
Age of OPAL members



OPAL members who have a disability



OPAL members living alone



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

Kath Haley
Kath Rolls
Katherine Oxby
Kirstie Lewis

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

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

Laura Nolan
Lesley-Ann Kane
Linda Gibson
Linda Paynter

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



Thank you!

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

Left during 2020/2021

Lesley Hastings

Staff:

Ailsa Rhodes

Sally-Anne Notley

Bev Fletcher

Shelley Clark

Gail Place

Mandy Mawson

CEO

Deputy Manager

SWIFt Project Worker

Project Worker

Café Worker

Project Worker

Started during 2020/2021

Steve Hogg

Nikki Sloper

Ellen Stoker

Digital Support Wkr

Café Development Mgr

Community Builder

Left during 2020/2021

Rowan Ackroyd

Johanna Mawson

Anne Sellens

Jennifer Ward

Project Worker

Community Builder

Project Worker

Project Worker





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**

Older People's Action in the Locality

Annual Report and Financial Statements for the year ended 31 March 2021

Contents	Page
Trustees' report	2 to 4
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	Bankers	
Welcome In Community Centre	National Westminster 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 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.

Older People's Action in the Locality

Trustees' report (continued) for the year ended 31 March 2021

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.

Older People's Action in the Locality

Trustees' report (continued) for the year ended 31 March 2021

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		<u>584,708</u>	<u>-</u>	<u>584,708</u>	<u>501,876</u>
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		<u>189,862</u>	<u>92,432</u>	<u>282,294</u>	<u>162,630</u>
Current liabilities:					
amounts falling due within one year					
Creditors and accruals	(8)	8,809	-	8,809	2,005
Total current liabilities		<u>8,809</u>	<u>-</u>	<u>8,809</u>	<u>2,005</u>
Net current assets / (liabilities)		<u>181,053</u>	<u>92,432</u>	<u>273,485</u>	<u>160,625</u>
Total assets less current liabilities		<u>765,761</u>	<u>92,432</u>	<u>858,193</u>	<u>662,501</u>
Creditors: amounts falling due after one yr.	(9)	27,654	-	27,654	-
Net assets		<u>738,107</u>	<u>92,432</u>	<u>830,539</u>	<u>662,501</u>
Funds					
Unrestricted funds		738,107	-	738,107	619,663
Restricted funds		<u>-</u>	<u>92,432</u>	<u>92,432</u>	<u>42,838</u>
Total funds		<u>738,107</u>	<u>92,432</u>	<u>830,539</u>	<u>662,501</u>

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.

Older People's Action in the Locality

Notes to the accounts

for the year ended 31 March 2021

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.

Older People's Action in the Locality
Notes to the accounts continued
for the year ended 31 March 2021

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
	<u>40,414</u>	<u>355,582</u>	<u>395,996</u>	<u>216,738</u>

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
	<u>157,997</u>	<u>150,000</u>

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
	<u>42,838</u>	<u>355,582</u>	<u>228,111</u>	<u>(77,877)</u>	<u>92,432</u>

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

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2021

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
<u>Cost</u>	£	£	£
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
<u>Depreciation</u>			
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
<u>Net book value</u>			
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	-

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2021

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
	<u>2,752</u>	<u>2,882</u>

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