

**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.



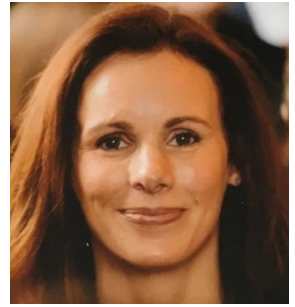
In terms of staffing Hattie Easton (Covid response), Kate Taverner (SWIFT project) and Natalie Gloveli (Café) joined the team during the year. Peter Ellis stepped down as Chair of Trustees in October – we thank him for his contribution as Chair over the past few years and are pleased that he remains 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.

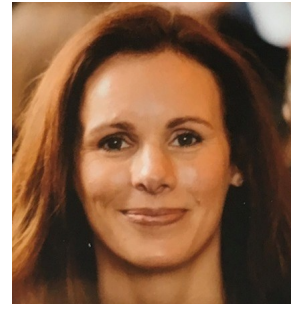
We have a fabulous team of Trustees who meet every 6 weeks to review OPAL's performance, making strategic decisions for our future and ensuring we are meeting our aims and objectives - reducing social isolation and loneliness for older people. I am grateful to the Board of Trustees for their unerring 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

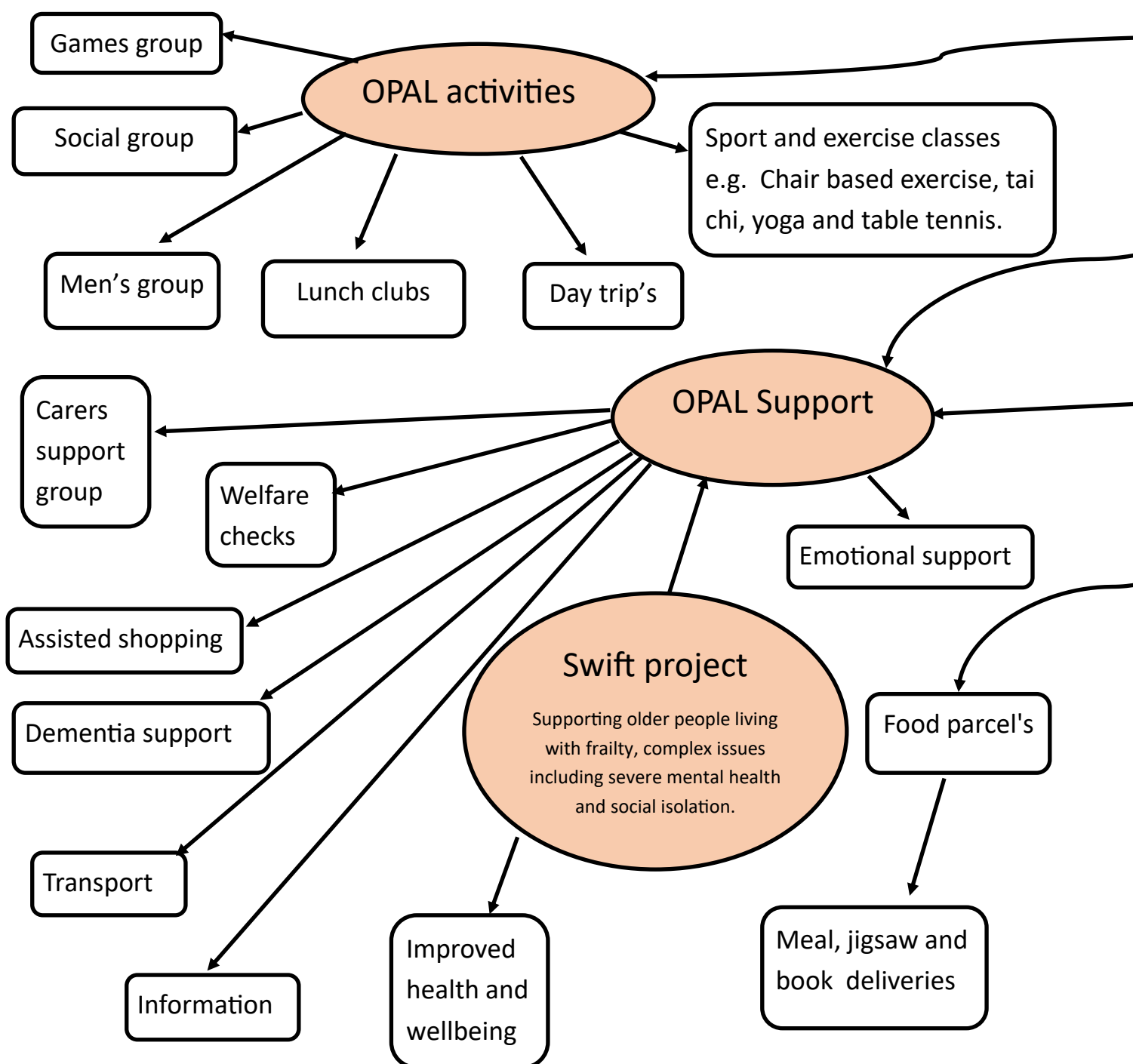
Ailsa Rhodes, CEO

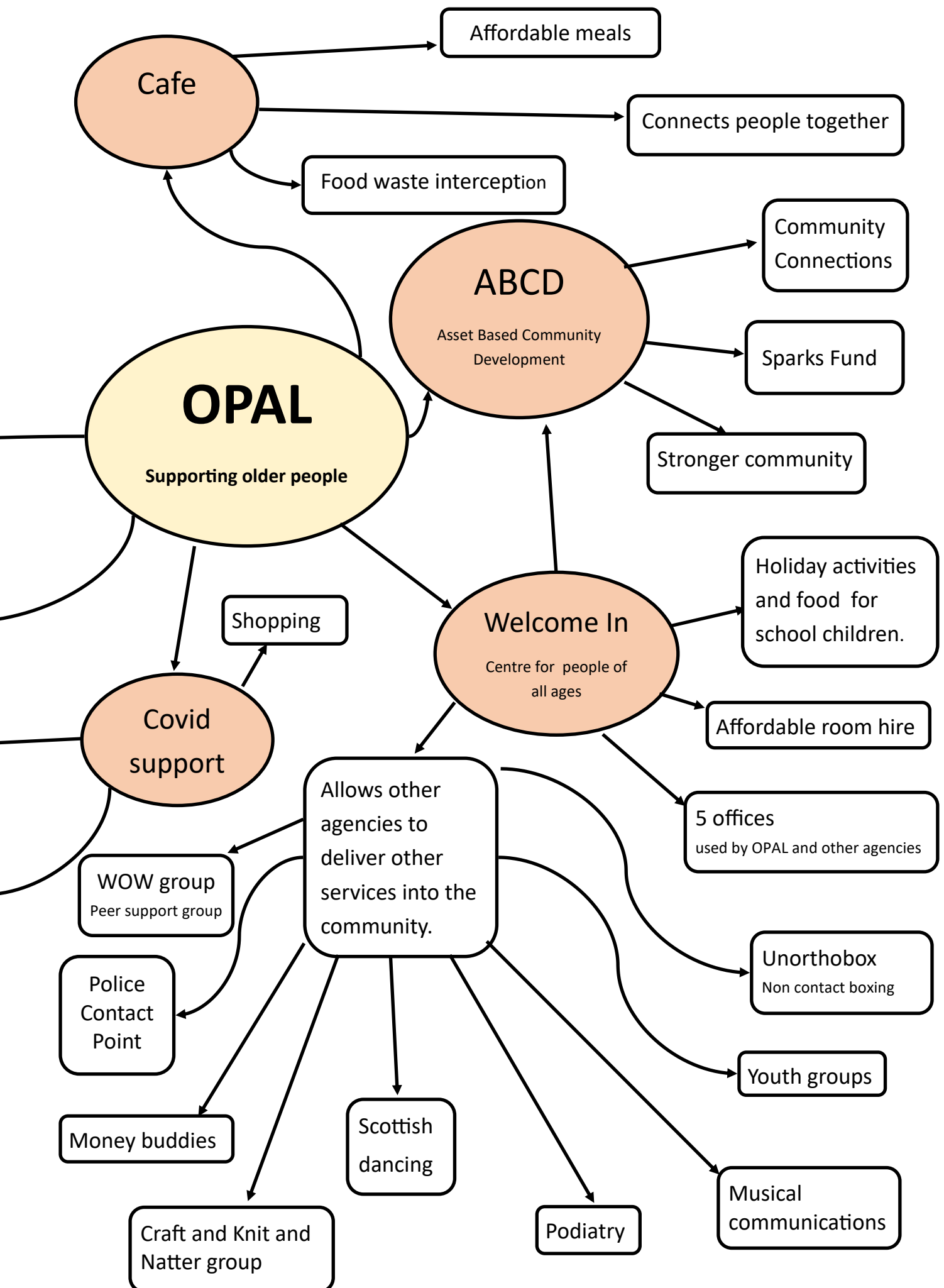
MAP of OPAL and the services and activities we offer

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....





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 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 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 students from **Leeds Beckett 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.

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.

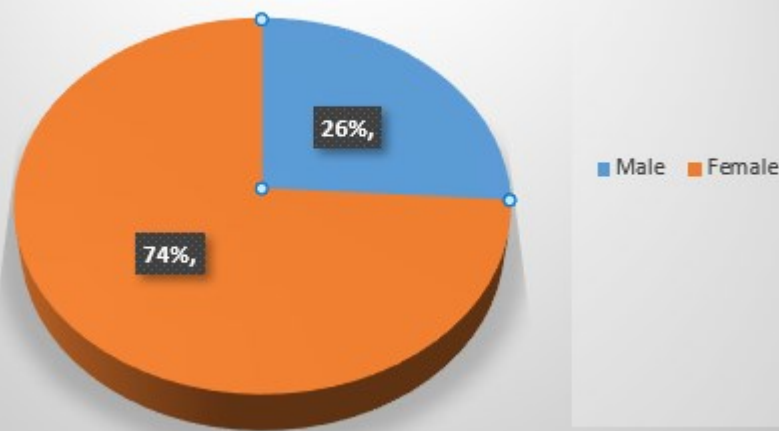
Volunteer Roles include:

- 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

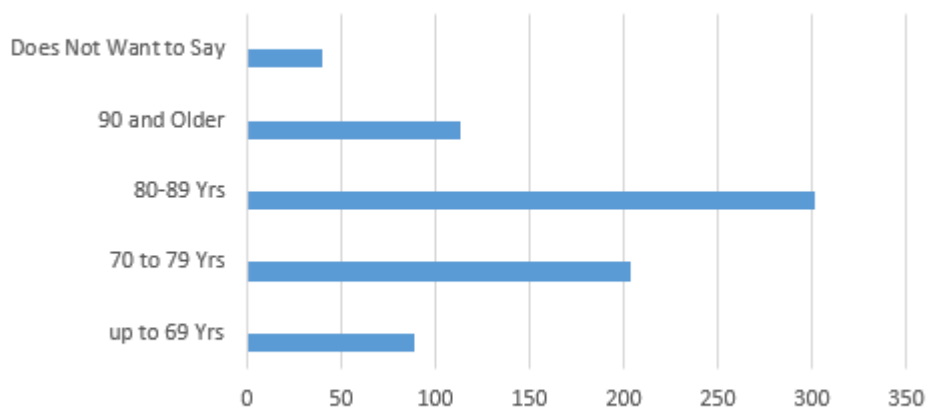


OPAL Members - some statistics

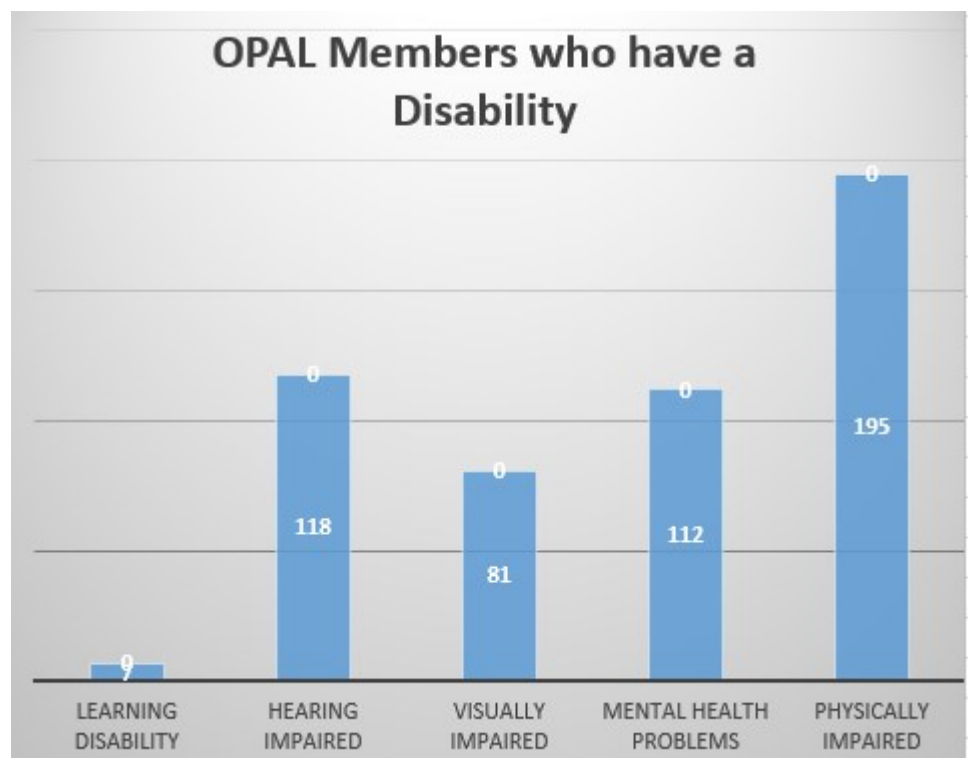
Gender of OPAL Members



Age of OPAL Members



OPAL Members who have a Disability



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

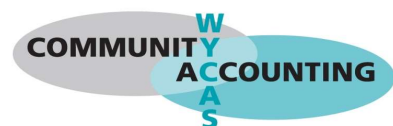
A company limited by guarantee number 06961204

Annual Report and Financial Statements

for the year ended 31 March 2022

OPAL

**OLDER PEOPLE'S
ACTION IN THE LOCALITY**



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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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	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 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.

Older People's Action in the Locality

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

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	2022	2022	2021
		Unrestricted	Restricted	Total	Total
		£	£	£	£
Fixed assets					
Tangible assets	(6)	575,222	-	575,222	584,708
Total fixed assets		<u>575,222</u>	<u>-</u>	<u>575,222</u>	<u>584,708</u>
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		<u>241,825</u>	<u>62,508</u>	<u>304,333</u>	<u>282,464</u>
Current liabilities:					
amounts falling due within one year					
Creditors and accruals	(9)	7,984	-	7,984	8,979
Total current liabilities		<u>7,984</u>	<u>-</u>	<u>7,984</u>	<u>8,979</u>
Net current assets / (liabilities)		<u>233,841</u>	<u>62,508</u>	<u>296,349</u>	<u>273,485</u>
Total assets less current liabilities		<u>809,063</u>	<u>62,508</u>	<u>871,571</u>	<u>858,193</u>
Creditors: amounts falling due after one year	(10)	22,469	-	22,469	27,654
Net assets		<u>786,594</u>	<u>62,508</u>	<u>849,102</u>	<u>830,539</u>
Funds					
Unrestricted funds		786,594	-	786,594	738,107
Restricted funds		-	62,508	62,508	92,432
Total funds		<u>786,594</u>	<u>62,508</u>	<u>849,102</u>	<u>830,539</u>

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.

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2022

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
	<u>27,460</u>	<u>244,594</u>	<u>272,054</u>	<u>395,996</u>

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 would 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
	<u>201,760</u>	<u>157,997</u>

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	-	-
	<u>92,432</u>	<u>244,594</u>	<u>273,284</u>	<u>(1,234)</u>	<u>62,508</u>

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

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2022

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

Older People's Action in the Locality

Notes to the accounts continued

for the year ended 31 March 2022

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
	<u>7,984</u>	<u>8,979</u>

10 Creditors: amounts falling due after one year	2022	2021
	£	£
Bank loans	22,469	27,654
	<u>22,469</u>	<u>27,654</u>

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
	<u>2,662</u>	<u>2,752</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 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