



**The Queen's Award  
for Voluntary Service**

*The MBE for volunteer groups*

**WELCOME IN**  
Community  
Centre & Cafe

# OPAL

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

Reducing isolation and improving the quality  
of life for older people



**Annual Report**

**1st April 2022 - 31st March 2023**



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# Welcome to OPAL

## From our CEO Ailsa Rhodes MBE

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

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

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

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

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



# **Chairman's Report**

## **From the Chair of Trustees, Martin Sellens**

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

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

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

# Chairman's Report Continued

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

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

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

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





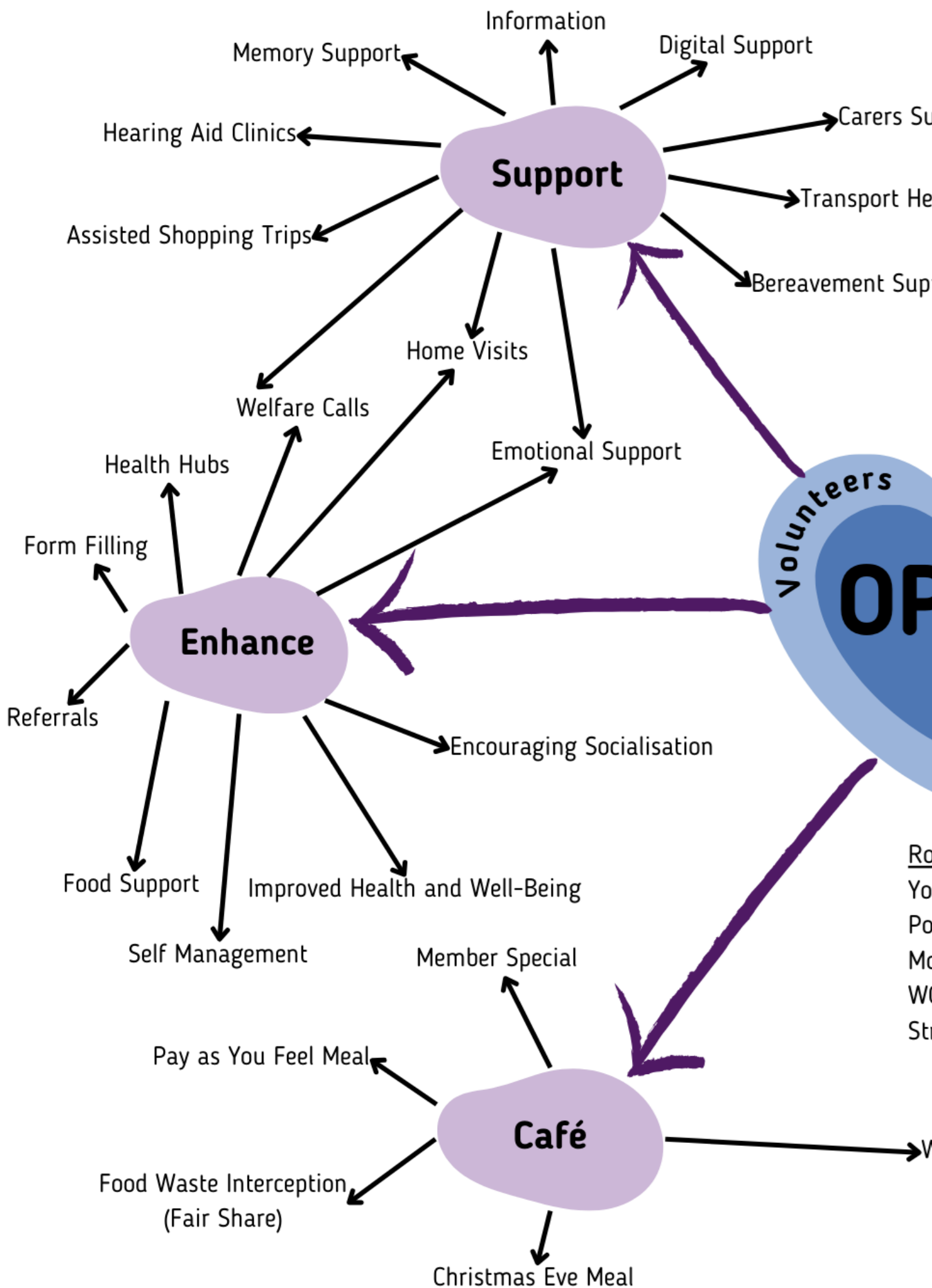




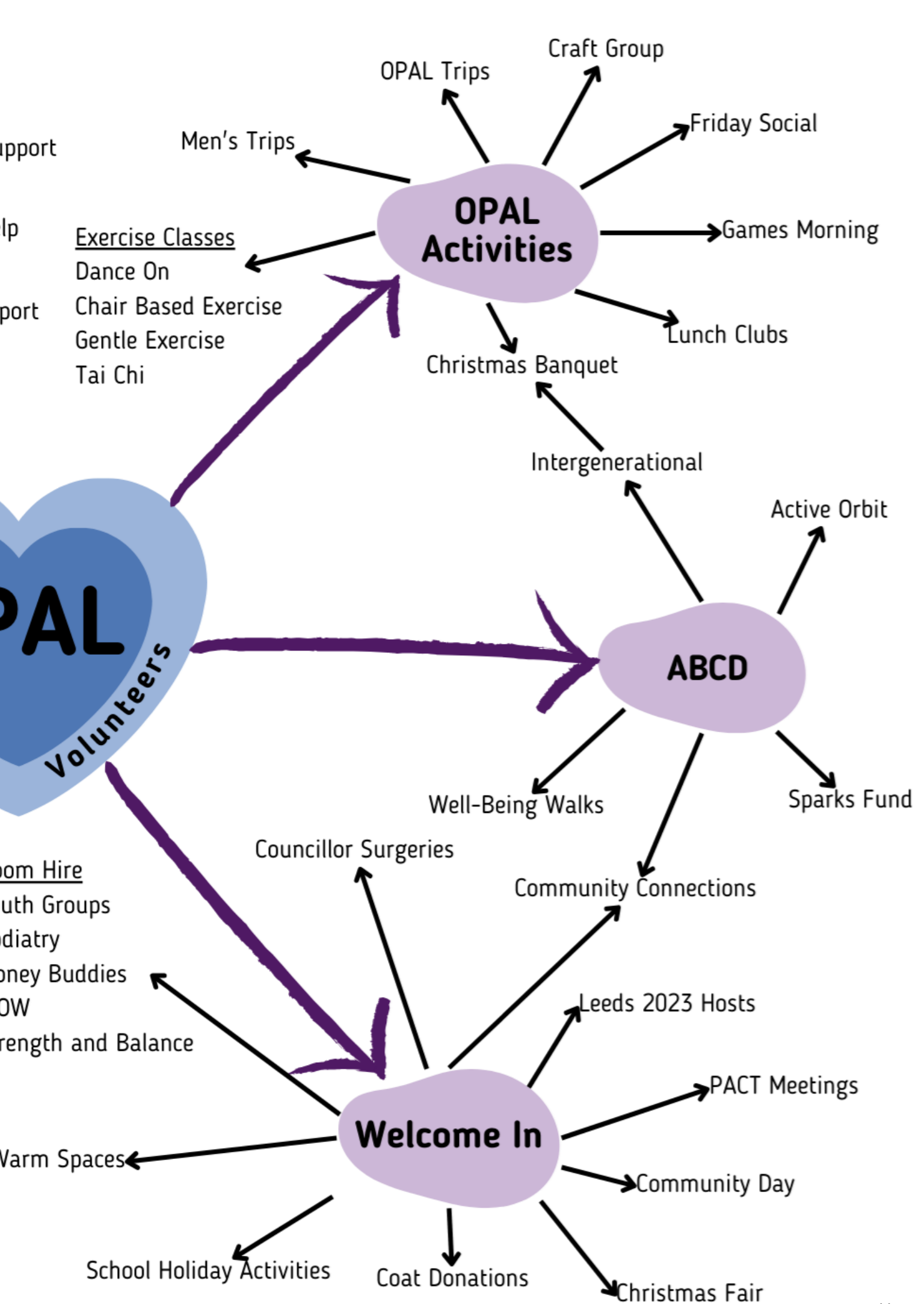


# Meet some of our OPAL members!









# **Health and Information**

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

## **SWIFt**

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

## **Enhance**

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

## **Health Hubs**

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

## **Hearing Clinics**

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

## **OPAL's Information Services**

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



# Warm and Well

## Winter Wellbeing

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

## Christmas Eve Meal

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

## Winter Coat Appeal

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

## Household Support Fund

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

## Christmas Hamper

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



# Intergenerational

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

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

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

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

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





# Tackling Loneliness and Isolation

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

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

## **Here is a list of our regular OPAL activities:**

Welcome In café

Monday, Wednesday and Friday Lunch clubs

Carers and cared-for support group

Bereavement support group

Memory support group

Volunteer assisted shopping trips

Day trips

Games mornings

Men's group trips

Craft group

Friday Social

Exercise classes: Tai Chi, Dance On, gentle exercise, chair based exercise, yoga



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

# **OPAL Support**

## **Memory Support**

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

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



## **Carers Support**

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

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



## **Digital Support**

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

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



# **OPAL Support Continued**

## **OPAL's Home Support**

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

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

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

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

## **Bereavement Support**

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



# Improving Physical Health

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

- Active Ageing, Anchor Hanover Group

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

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

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

Our Exercise programme includes:

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



In partnership with Yorkshire Dance:

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

## 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. Lyndsey volunteers her time and services once a week on a Monday morning, offering massages to our members for only £10 per session.

# Partnerships and Support from other Agencies



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

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

# Welcome In Café

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

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

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

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

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

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

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

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





# Community

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

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

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

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



## Jubilee



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



# 20th Birthday Party

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

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



PARTY TIME



# Our Wonderful Volunteers

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

## **Volunteer Roles include:**

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



Thank  
you!



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

# Monitoring and Evaluation

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

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

## **Annual Questionnaire April 2023**

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

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

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

### **What difference has OPAL made to you and your life?**

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

### **What do you like most about OPAL?**

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

**Thank  
you!**



# Monitoring and Evaluation

## **What do you think OPAL should do differently?**

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

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

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

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

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

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

Maybe a film show occasionally could be a nice entertainment.

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

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

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

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

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

## **Do you find taxis and public transport reliable and accessible?**

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

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

There could be instances when it could be useful.

Yes. I could then join in with daily activities.

It would be nice to have this.

Deafness and social anxiety of travelling alone.

Think it's a great idea.

## **Comments:**

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

# **Treasurer's Report**

## **From Louise Tanner**

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

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

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

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

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

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

# Treasurer's Report Continued

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


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

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

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


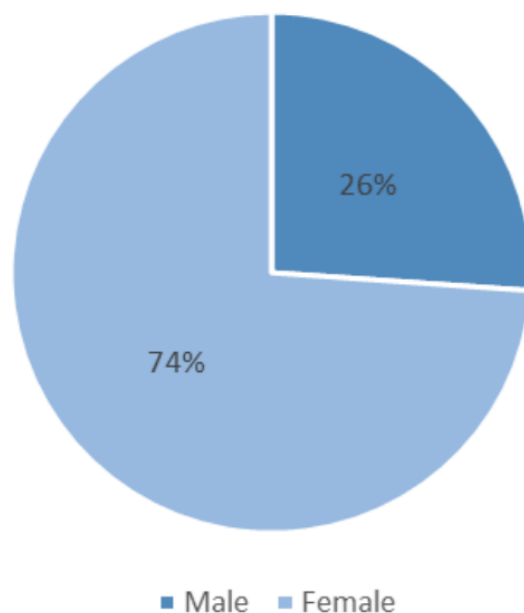


# OPAL Members - Some Statistics



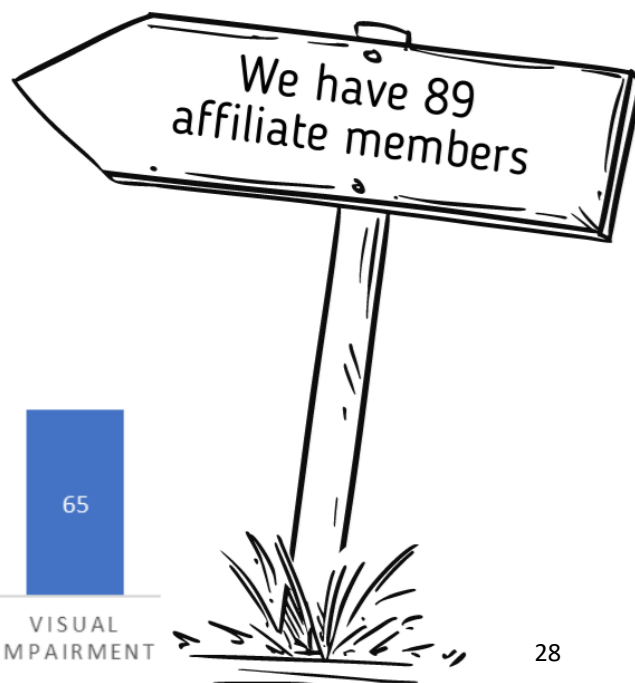
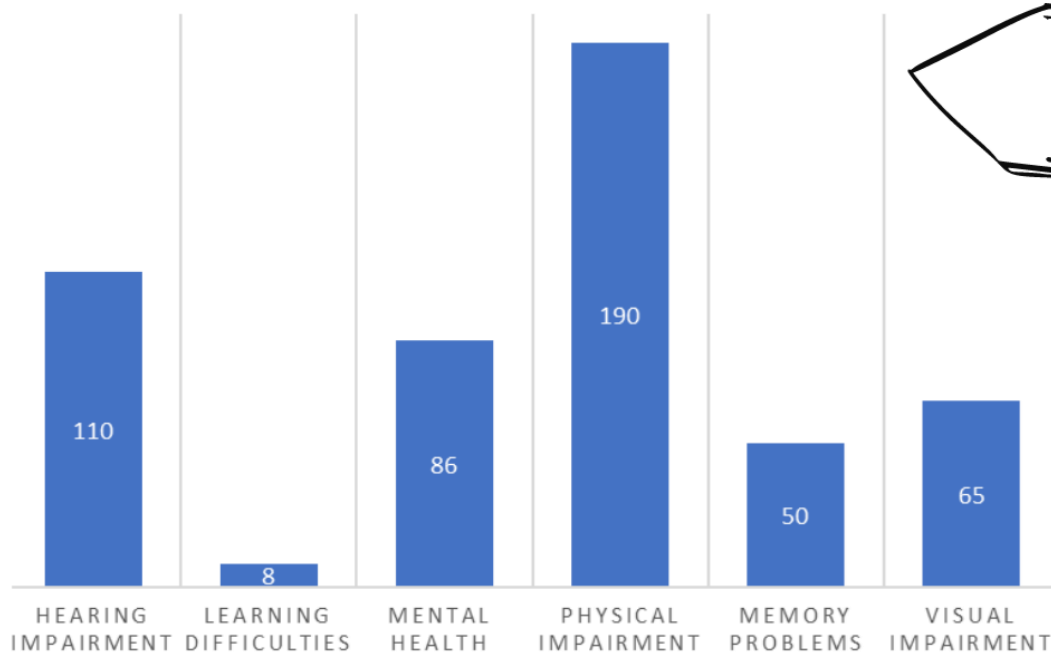
54 of our members are carers

OPAL Members by Gender



The average age of our members is 80 years old!

## MEMBERS WITH ADDITIONAL NEEDS





# OPAL

OLDER PEOPLE'S  
ACTION IN THE LOCALITY

WELCOME IN  
Community  
Centre & Cafe



## The Committee:

Martin Sellens, Chairman  
Louise Tanner, Treasurer

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

Advisors to Committee  
Cllr Barry Anderson

## Staff:

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

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

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

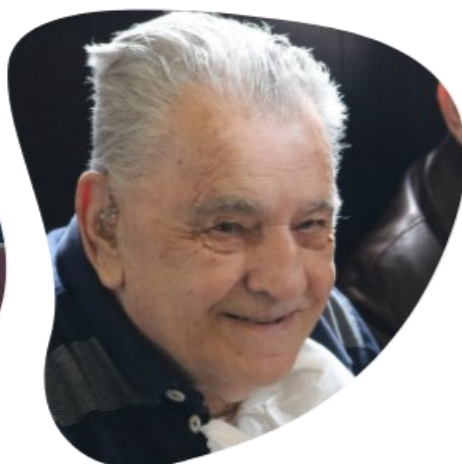








# Our members, staff and volunteers





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

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

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

#### **Restricted Funds:**

#### **Purpose of restriction**

##### **Fund name**

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

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



# **Older People's Action in the Locality**

Charity number 1131792

A company limited by guarantee number 06961204

## **Annual Report and Financial Statements**

**for the year ended 31 March 2023**

# **OPAL**

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**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 2023**

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Trustees' report	2 to 5
Examiner's report	6
Statement of financial activities	7
Balance sheet	8
Notes to the accounts	9 to 15

**Prepared by West Yorkshire Community Accountancy Service CIO**

# Older People's Action in the Locality

## Trustees' report for the year ended 31 March 2023

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

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

Name	Position	Dates
Martin Sellens	Chair	
Louise Tanner	Treasurer	
Howard Marshall		Resigned July 2023
Peter Ellis		
Grace Clark		
Gary Hartley		
Christopher Hindle		
Elizabeth Locke		
Jennifer Ward		
John Sutcliffe		
<b>Charity number</b>	1131792	Registered in England and Wales
<b>Company number</b>	06961204	Registered in England and Wales
<b>Registered and principal address</b>	<b>Bankers</b>	
Welcome In Community Centre	Nat West Bank	Cambridge and Counties Bank
55 Bedford Drive	491 Otley Road	Charnwood Court
Leeds	Leeds	5B New Walk
LS16 6DJ	LS16 7YB	Leicester
		LE1 6TE

### Independent examiner

Simon Bostrom FCIE

### West Yorkshire Community Accountancy Service CIO

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW

### Structure, governance and management

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

### Method of recruitment and appointment of trustees

The trustees of the charity are also the directors for the purposes of company law and are appointed by the members at the AGM.

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

# **Older People's Action in the Locality**

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

### **Objectives and activities**

#### **The charity's objects**

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

#### **The charity's main activities**

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

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

#### **Public benefit statement**

In setting our objectives and planning our activities our Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular the health and wellbeing of older people.

#### **Achievements and performance**

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

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

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

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

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

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



## **Older People's Action in the Locality**

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

#### **Financial review**

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

#### **Reserves policy**

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

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

## **Older People's Action in the Locality**

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

#### **Statement of trustees' responsibilities**

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

Company law requires the trustees to prepare financial accounts for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and apply them consistently;

- observe the methods and principles in the Charities SORP;

- make judgements and estimates that are reasonable and prudent;

- state whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;

- prepare the accounts on a going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and to enable them to ensure that the financial accounts comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

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

approved by the board of trustees on 6 September 2023

Louise Tanner (Trustee)

# **Older People's Action in the Locality**

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

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2023, which are set out on pages 7 to 15.

### **Responsibilities and basis of report**

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

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

### **Independent examiner's statement**

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

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

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

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

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

Simon Bostrom FCIE

8 September 2023

### **West Yorkshire Community Accountancy Service CIO**

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW



**Older People's Action in the Locality**  
**Statement of Financial Activities**  
**(including summary income and expenditure account)**  
**for the year ended 31 March 2023**

	Notes	2023 Unrestricted funds £	2023 Restricted funds £	2023 Total funds £	2022 Total funds £
<b>Income from:</b>					
Grants and donations	(2)	23,523	208,233	231,756	272,054
Fees and charges		57,576	-	57,576	48,083
Café income		42,956	-	42,956	20,179
Memberships		7,693	-	7,693	6,738
Rent and room hire		22,397	-	22,397	20,763
Fundraising		2,501	-	2,501	3,425
Bank interest		2,836	-	2,836	1,046
In kind services		-	-	-	5,348
Other income		1,105	-	1,105	6,392
<b>Total income</b>		<b>160,587</b>	<b>208,233</b>	<b>368,820</b>	<b>384,028</b>
<b>Expenditure on:</b>					
Salaries NI and pensions	(3)	84,468	145,964	230,432	201,760
Payroll costs		143	1,909	2,052	1,952
Staff travel expenses		511	787	1,298	447
Training		279	320	599	135
Volunteer expenses and training		101	488	589	290
Events and activities		43,240	36,204	79,444	40,238
Café supplies and equipment		17,130	2,923	20,053	23,643
Equipment and materials		144	2,376	2,520	2,713
Premises costs		2,416	23,023	25,439	22,123
Phone, postage and internet		393	5,282	5,675	6,128
Computers and IT		22	4,317	4,339	5,864
Printing and stationery		48	484	532	2,428
Memberships and subscriptions		1,868	2,664	4,532	3,535
Insurance		-	4,989	4,989	4,891
Hospitality and sundry costs		185	106	291	384
Governance costs		37	287	324	273
Independent examination		56	1,393	1,449	1,380
Legal and professional		-	-	-	500
Repairs and maintenance		1,492	2,589	4,081	7,628
In kind services - landscaping works		-	-	-	5,348
Depreciation		32,663	-	32,663	32,440
Loan interest		1,221	-	1,221	1,365
<b>Total expenditure</b>		<b>186,417</b>	<b>236,105</b>	<b>422,522</b>	<b>365,465</b>
<b>Net income / (expenditure)</b>		<b>(25,830)</b>	<b>(27,872)</b>	<b>(53,702)</b>	<b>18,563</b>
<b>Fund balances brought forward</b>		<b>786,594</b>	<b>62,508</b>	<b>849,102</b>	<b>830,539</b>
<b>Fund balances carried forward</b>	(4)	<b>760,764</b>	<b>34,636</b>	<b>795,400</b>	<b>849,102</b>

All incoming resources and resources expended derive from continuing activities.

# Older People's Action in the Locality

## Balance sheet

as at 31 March 2023

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

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

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

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

The financial statements were approved by the board of trustees on 6 September 2023

Louise Tanner (Trustee)

# **Older People's Action in the Locality**

## **Notes to the accounts**

### **for the year ended 31 March 2023**

#### **1 Accounting policies**

##### **Basis of accounting**

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note(s) to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) and with the Charities Act 2011.

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

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

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

##### **Going concern**

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

##### **Incoming resources**

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

##### **Grants and donations**

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

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

Donated goods for resale are valued at the amount actually realised upon their sale.

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

##### **Expenditure and liabilities**

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

##### **Taxation**

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

##### **Tangible fixed assets**

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

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

Fixtures and equipment: over 5 years

Leasehold improvements: over the life of the lease



# **Older People's Action in the Locality**

## **Notes to the accounts**

### **for the year ended 31 March 2023**

#### **1 Accounting policies continued**

##### **Pensions**

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

##### **Fund accounting**

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

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

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

##### **Leases**

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

**Older People's Action in the Locality**  
**Notes to the accounts continued**  
**for the year ended 31 March 2023**

<b>2 Grants and donations</b>	2023	2023	2023	2022
	Unrestricted	Restricted	Total	Total
	funds	funds	funds	funds
	£	£	£	£
Barca	-	1,500	1,500	-
Leeds Community Foundation (LCF)	-	8,588	8,588	-
Co-op Local Community Fund	-	3,854	3,854	-
Harrison and Potter Trust	-	5,530	5,530	7,777
Leeds City Council (LCC)	-	119,136	119,136	203,126
Leeds Civic Trust	-	450	450	-
Leeds Convalescent Society	-	500	500	-
Leeds Culture Trust	-	400	400	-
Leeds Older Peoples Forum (LOPF)	-	51,400	51,400	1,550
Local Care Partnership (LCP)	-	3,125	3,125	-
Voluntary Action Leeds	-	13,750	13,750	1,000
Leeds Community Foundation	-	-	-	7,821
Power to Change	-	-	-	20,000
Wades Charity	-	-	-	3,120
Other grants and donations (including gift aid)	23,523	-	23,523	27,660
	<u>23,523</u>	<u>208,233</u>	<u>231,756</u>	<u>272,054</u>

<b>3 Staff costs and numbers</b>	2023	2022
	£	£
Gross salaries	214,332	188,976
Social security costs	14,986	11,994
Employment allowance	(5,000)	(4,000)
Pensions	6,114	4,790
	<u>230,432</u>	<u>201,760</u>

The average number of employees during the year was 12.5, being an average of 8.4 full time equivalent (2022: 11.9, 8 FTE). There were no employees with emoluments above £60,000.

<b>Defined contribution pension scheme</b>	2023	2022
	£	£
Costs of the scheme to the charity for the year	6,114	4,790
Amount of any contributions outstanding at the year end	-	-

# Older People's Action in the Locality

## Notes to the accounts continued

for the year ended 31 March 2023

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

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



**Older People's Action in the Locality**  
**Notes to the accounts continued**  
**for the year ended 31 March 2023**

<b>5 Tangible assets</b>	Leasehold property	Fixtures and equipment	Total
<u><b>Cost</b></u>	£	£	£
At 1 April 2022	692,233	26,312	718,545
Additions	-	2,801	2,801
At 31 March 2023	<u>692,233</u>	<u>29,113</u>	<u>721,346</u>
<u><b>Depreciation</b></u>			
At 1 April 2022	128,235	15,088	143,323
Charge for year	<u>28,226</u>	<u>4,437</u>	<u>32,663</u>
At 31 March 2023	<u>156,461</u>	<u>19,525</u>	<u>175,986</u>
<u><b>Net book value</b></u>			
At 31 March 2023	<u>535,772</u>	<u>9,588</u>	<u>545,360</u>
At 31 March 2022	<u>563,998</u>	<u>11,224</u>	<u>575,222</u>
<b>6 Debtors and prepayments</b>	2023	2022	
	£	£	
Prepayments	1,567	1,329	
Accrued income	<u>6,525</u>	<u>9,868</u>	
	<u>8,092</u>	<u>11,197</u>	
<b>7 Current asset investments</b>	2023	2022	
	£	£	
Cash equivalents on deposit	<u>105,930</u>	<u>103,759</u>	
	<u>105,930</u>	<u>103,759</u>	
<b>8 Cash at bank and in hand</b>	2023	2022	
	£	£	
Cash at bank	162,615	189,168	
Cash in hand	<u>201</u>	<u>209</u>	
	<u>162,816</u>	<u>189,377</u>	
<b>9 Creditors and accruals</b>	2023	2022	
	£	£	
Bank loans and overdrafts	-	5,185	
Creditors	4,509	1,419	
Amounts received on account for contracts / performance related grants	20,840	-	
Accruals	<u>1,449</u>	<u>1,380</u>	
	<u>26,798</u>	<u>7,984</u>	

**Older People's Action in the Locality**  
**Notes to the accounts continued**  
**for the year ended 31 March 2023**

**10 Creditors: amounts falling due after one year**

	2023	2022
	£	£
Bank loans	-	22,469
	<u>-</u>	<u>22,469</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 by key management personnel were £74,046 (previous year: £67,266).

**12 Operating leases**

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

	2023 Unrestricted funds £	2022 Unrestricted funds £	2023 Restricted funds £	2022 Restricted funds £	2023 Total funds £	2022 Total funds £
<b>Income</b>						
Grants and donations	23,523	27,460	208,233	244,594	231,756	272,054
Fees and charges	57,576	48,083	-	-	57,576	48,083
Café income	42,956	20,179	-	-	42,956	20,179
Memberships	7,693	6,738	-	-	7,693	6,738
Rent and room hire	22,397	20,763	-	-	22,397	20,763
Fundraising	2,501	3,425	-	-	2,501	3,425
Bank interest	2,836	1,046	-	-	2,836	1,046
In kind services	-	5,348	-	-	-	5,348
Other income	1,105	6,392	-	-	1,105	6,392
<b>Total income</b>	<b>160,587</b>	<b>139,434</b>	<b>208,233</b>	<b>244,594</b>	<b>368,820</b>	<b>384,028</b>
<b>Expenditure</b>						
Salaries NI and pensions	84,468	24,691	145,964	177,069	230,432	201,760
Payroll costs	143	-	1,909	1,952	2,052	1,952
Staff travel expenses	511	44	787	403	1,298	447
Training	279	-	320	135	599	135
Volunteer expenses and training	101	-	488	290	589	290
Events and activities	43,240	10,623	36,204	29,615	79,444	40,238
Café supplies and equipment	17,130	14,046	2,923	9,597	20,053	23,643
Equipment and materials	144	95	2,376	2,618	2,520	2,713
Premises costs	2,416	1,624	23,023	20,499	25,439	22,123
Phone, postage and internet	393	-	5,282	6,128	5,675	6,128
Computers and IT	22	-	4,317	5,864	4,339	5,864
Printing and stationery	48	91	484	2,337	532	2,428
Memberships and subscriptions	1,868	520	2,664	3,015	4,532	3,535
Insurance	-	-	4,989	4,891	4,989	4,891
Hospitality and sundry costs	185	53	106	331	291	384
Governance costs	37	57	287	216	324	273
Independent examination	56	-	1,393	1,380	1,449	1,380
Legal and professional	-	-	-	500	-	500
Repairs and maintenance	1,492	1,184	2,589	6,444	4,081	7,628
In kind services - landscaping works	-	5,348	-	-	-	5,348
Depreciation	32,663	32,440	-	-	32,663	32,440
Loan interest	1,221	1,365	-	-	1,221	1,365
<b>Total expenditure</b>	<b>186,417</b>	<b>92,181</b>	<b>236,105</b>	<b>273,284</b>	<b>422,522</b>	<b>365,465</b>
<b>Net income / (expenditure)</b>	<b>(25,830)</b>	<b>47,253</b>	<b>(27,872)</b>	<b>(28,690)</b>	<b>(53,702)</b>	<b>18,563</b>
<b>Transfers between funds</b>	<b>-</b>	<b>1,234</b>	<b>-</b>	<b>(1,234)</b>	<b>-</b>	<b>-</b>
<b>Net movement in funds</b>	<b>(25,830)</b>	<b>48,487</b>	<b>(27,872)</b>	<b>(29,924)</b>	<b>(53,702)</b>	<b>18,563</b>
<b>Fund balances brought forward</b>	<b>786,594</b>	<b>738,107</b>	<b>62,508</b>	<b>92,432</b>	<b>849,102</b>	<b>830,539</b>
<b>Fund balances carried forward</b>	<b>760,764</b>	<b>786,594</b>	<b>34,636</b>	<b>62,508</b>	<b>795,400</b>	<b>849,102</b>



# **Older People's Action in the Locality**

Charity number 1131792

A company limited by guarantee number 06961204

## **Annual Report and Financial Statements**

**for the year ended 31 March 2023**

# **OPAL**

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**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 2023**

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Trustees' report	2 to 5
Examiner's report	6
Statement of financial activities	7
Balance sheet	8
Notes to the accounts	9 to 15

**Prepared by West Yorkshire Community Accountancy Service CIO**

# Older People's Action in the Locality

## Trustees' report for the year ended 31 March 2023

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

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

Name	Position	Dates
Martin Sellens	Chair	
Louise Tanner	Treasurer	
Howard Marshall		Resigned July 2023
Peter Ellis		
Grace Clark		
Gary Hartley		
Christopher Hindle		
Elizabeth Locke		
Jennifer Ward		
John Sutcliffe		
<b>Charity number</b>	1131792	Registered in England and Wales
<b>Company number</b>	06961204	Registered in England and Wales
<b>Registered and principal address</b>	<b>Bankers</b>	
Welcome In Community Centre	Nat West Bank	Cambridge and Counties Bank
55 Bedford Drive	491 Otley Road	Charnwood Court
Leeds	Leeds	5B New Walk
LS16 6DJ	LS16 7YB	Leicester
		LE1 6TE

### Independent examiner

Simon Bostrom FCIE

### West Yorkshire Community Accountancy Service CIO

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW

### Structure, governance and management

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

### Method of recruitment and appointment of trustees

The trustees of the charity are also the directors for the purposes of company law and are appointed by the members at the AGM.

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



# **Older People's Action in the Locality**

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

### **Objectives and activities**

#### **The charity's objects**

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

#### **The charity's main activities**

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

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

#### **Public benefit statement**

In setting our objectives and planning our activities our Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular the health and wellbeing of older people.

#### **Achievements and performance**

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

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

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

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

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

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

## **Older People's Action in the Locality**

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

#### **Financial review**

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

#### **Reserves policy**

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

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

## **Older People's Action in the Locality**

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

#### **Statement of trustees' responsibilities**

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

Company law requires the trustees to prepare financial accounts for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and apply them consistently;

- observe the methods and principles in the Charities SORP;

- make judgements and estimates that are reasonable and prudent;

- state whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;

- prepare the accounts on a going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and to enable them to ensure that the financial accounts comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

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

approved by the board of trustees on 6 September 2023

Louise Tanner (Trustee)



# **Older People's Action in the Locality**

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

I report to the charity trustees on my examination of the accounts of the charitable company for the year ended 31 March 2023, which are set out on pages 7 to 15.

### **Responsibilities and basis of report**

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

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

### **Independent examiner's statement**

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

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

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

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

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

Simon Bostrom FCIE

8 September 2023

### **West Yorkshire Community Accountancy Service CIO**

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW

**Older People's Action in the Locality**  
**Statement of Financial Activities**  
**(including summary income and expenditure account)**  
**for the year ended 31 March 2023**

	Notes	2023 Unrestricted funds £	2023 Restricted funds £	2023 Total funds £	2022 Total funds £
<b>Income from:</b>					
Grants and donations	(2)	23,523	208,233	231,756	272,054
Fees and charges		57,576	-	57,576	48,083
Café income		42,956	-	42,956	20,179
Memberships		7,693	-	7,693	6,738
Rent and room hire		22,397	-	22,397	20,763
Fundraising		2,501	-	2,501	3,425
Bank interest		2,836	-	2,836	1,046
In kind services		-	-	-	5,348
Other income		1,105	-	1,105	6,392
<b>Total income</b>		<b>160,587</b>	<b>208,233</b>	<b>368,820</b>	<b>384,028</b>
<b>Expenditure on:</b>					
Salaries NI and pensions	(3)	84,468	145,964	230,432	201,760
Payroll costs		143	1,909	2,052	1,952
Staff travel expenses		511	787	1,298	447
Training		279	320	599	135
Volunteer expenses and training		101	488	589	290
Events and activities		43,240	36,204	79,444	40,238
Café supplies and equipment		17,130	2,923	20,053	23,643
Equipment and materials		144	2,376	2,520	2,713
Premises costs		2,416	23,023	25,439	22,123
Phone, postage and internet		393	5,282	5,675	6,128
Computers and IT		22	4,317	4,339	5,864
Printing and stationery		48	484	532	2,428
Memberships and subscriptions		1,868	2,664	4,532	3,535
Insurance		-	4,989	4,989	4,891
Hospitality and sundry costs		185	106	291	384
Governance costs		37	287	324	273
Independent examination		56	1,393	1,449	1,380
Legal and professional		-	-	-	500
Repairs and maintenance		1,492	2,589	4,081	7,628
In kind services - landscaping works		-	-	-	5,348
Depreciation		32,663	-	32,663	32,440
Loan interest		1,221	-	1,221	1,365
<b>Total expenditure</b>		<b>186,417</b>	<b>236,105</b>	<b>422,522</b>	<b>365,465</b>
<b>Net income / (expenditure)</b>		<b>(25,830)</b>	<b>(27,872)</b>	<b>(53,702)</b>	<b>18,563</b>
<b>Fund balances brought forward</b>		<b>786,594</b>	<b>62,508</b>	<b>849,102</b>	<b>830,539</b>
<b>Fund balances carried forward</b>	(4)	<b>760,764</b>	<b>34,636</b>	<b>795,400</b>	<b>849,102</b>

All incoming resources and resources expended derive from continuing activities.

# Older People's Action in the Locality

## Balance sheet

as at 31 March 2023

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

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

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

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

The financial statements were approved by the board of trustees on 6 September 2023

Louise Tanner (Trustee)

# **Older People's Action in the Locality**

## **Notes to the accounts**

### **for the year ended 31 March 2023**

#### **1 Accounting policies**

##### **Basis of accounting**

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note(s) to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) and with the Charities Act 2011.

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

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

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

##### **Going concern**

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

##### **Incoming resources**

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

##### **Grants and donations**

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

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

Donated goods for resale are valued at the amount actually realised upon their sale.

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

##### **Expenditure and liabilities**

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

##### **Taxation**

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

##### **Tangible fixed assets**

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

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

Fixtures and equipment: over 5 years

Leasehold improvements: over the life of the lease



# **Older People's Action in the Locality**

## **Notes to the accounts**

### **for the year ended 31 March 2023**

#### **1 Accounting policies continued**

##### **Pensions**

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

##### **Fund accounting**

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

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

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

##### **Leases**

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

**Older People's Action in the Locality**  
**Notes to the accounts continued**  
**for the year ended 31 March 2023**

<b>2 Grants and donations</b>	2023	2023	2023	2022
	Unrestricted	Restricted	Total	Total
	funds	funds	funds	funds
	£	£	£	£
Barca	-	1,500	1,500	-
Leeds Community Foundation (LCF)	-	8,588	8,588	-
Co-op Local Community Fund	-	3,854	3,854	-
Harrison and Potter Trust	-	5,530	5,530	7,777
Leeds City Council (LCC)	-	119,136	119,136	203,126
Leeds Civic Trust	-	450	450	-
Leeds Convalescent Society	-	500	500	-
Leeds Culture Trust	-	400	400	-
Leeds Older Peoples Forum (LOPF)	-	51,400	51,400	1,550
Local Care Partnership (LCP)	-	3,125	3,125	-
Voluntary Action Leeds	-	13,750	13,750	1,000
Leeds Community Foundation	-	-	-	7,821
Power to Change	-	-	-	20,000
Wades Charity	-	-	-	3,120
Other grants and donations (including gift aid)	23,523	-	23,523	27,660
	<u>23,523</u>	<u>208,233</u>	<u>231,756</u>	<u>272,054</u>

<b>3 Staff costs and numbers</b>	2023	2022
	£	£
Gross salaries	214,332	188,976
Social security costs	14,986	11,994
Employment allowance	(5,000)	(4,000)
Pensions	6,114	4,790
	<u>230,432</u>	<u>201,760</u>

The average number of employees during the year was 12.5, being an average of 8.4 full time equivalent (2022: 11.9, 8 FTE). There were no employees with emoluments above £60,000.

<b>Defined contribution pension scheme</b>	2023	2022
	£	£
Costs of the scheme to the charity for the year	6,114	4,790
Amount of any contributions outstanding at the year end	-	-

# Older People's Action in the Locality

## Notes to the accounts continued

for the year ended 31 March 2023

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

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

**Older People's Action in the Locality**  
**Notes to the accounts continued**  
**for the year ended 31 March 2023**

<b>5 Tangible assets</b>	Leasehold property	Fixtures and equipment	Total
<u><b>Cost</b></u>	£	£	£
At 1 April 2022	692,233	26,312	718,545
Additions	-	2,801	2,801
At 31 March 2023	<u>692,233</u>	<u>29,113</u>	<u>721,346</u>
<u><b>Depreciation</b></u>			
At 1 April 2022	128,235	15,088	143,323
Charge for year	<u>28,226</u>	<u>4,437</u>	<u>32,663</u>
At 31 March 2023	<u>156,461</u>	<u>19,525</u>	<u>175,986</u>
<u><b>Net book value</b></u>			
At 31 March 2023	<u>535,772</u>	<u>9,588</u>	<u>545,360</u>
At 31 March 2022	<u>563,998</u>	<u>11,224</u>	<u>575,222</u>
<b>6 Debtors and prepayments</b>	2023	2022	
	£	£	
Prepayments	1,567	1,329	
Accrued income	<u>6,525</u>	<u>9,868</u>	
	<u>8,092</u>	<u>11,197</u>	
<b>7 Current asset investments</b>	2023	2022	
	£	£	
Cash equivalents on deposit	<u>105,930</u>	<u>103,759</u>	
	<u>105,930</u>	<u>103,759</u>	
<b>8 Cash at bank and in hand</b>	2023	2022	
	£	£	
Cash at bank	162,615	189,168	
Cash in hand	<u>201</u>	<u>209</u>	
	<u>162,816</u>	<u>189,377</u>	
<b>9 Creditors and accruals</b>	2023	2022	
	£	£	
Bank loans and overdrafts	-	5,185	
Creditors	4,509	1,419	
Amounts received on account for contracts / performance related grants	20,840	-	
Accruals	<u>1,449</u>	<u>1,380</u>	
	<u>26,798</u>	<u>7,984</u>	



**Older People's Action in the Locality**  
**Notes to the accounts continued**  
**for the year ended 31 March 2023**

**10 Creditors: amounts falling due after one year**

	2023	2022
	£	£
Bank loans	-	22,469
	<u>-</u>	<u>22,469</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 by key management personnel were £74,046 (previous year: £67,266).

**12 Operating leases**

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

	2023 Unrestricted funds £	2022 Unrestricted funds £	2023 Restricted funds £	2022 Restricted funds £	2023 Total funds £	2022 Total funds £
<b>Income</b>						
Grants and donations	23,523	27,460	208,233	244,594	231,756	272,054
Fees and charges	57,576	48,083	-	-	57,576	48,083
Café income	42,956	20,179	-	-	42,956	20,179
Memberships	7,693	6,738	-	-	7,693	6,738
Rent and room hire	22,397	20,763	-	-	22,397	20,763
Fundraising	2,501	3,425	-	-	2,501	3,425
Bank interest	2,836	1,046	-	-	2,836	1,046
In kind services	-	5,348	-	-	-	5,348
Other income	1,105	6,392	-	-	1,105	6,392
<b>Total income</b>	<b>160,587</b>	<b>139,434</b>	<b>208,233</b>	<b>244,594</b>	<b>368,820</b>	<b>384,028</b>
<b>Expenditure</b>						
Salaries NI and pensions	84,468	24,691	145,964	177,069	230,432	201,760
Payroll costs	143	-	1,909	1,952	2,052	1,952
Staff travel expenses	511	44	787	403	1,298	447
Training	279	-	320	135	599	135
Volunteer expenses and training	101	-	488	290	589	290
Events and activities	43,240	10,623	36,204	29,615	79,444	40,238
Café supplies and equipment	17,130	14,046	2,923	9,597	20,053	23,643
Equipment and materials	144	95	2,376	2,618	2,520	2,713
Premises costs	2,416	1,624	23,023	20,499	25,439	22,123
Phone, postage and internet	393	-	5,282	6,128	5,675	6,128
Computers and IT	22	-	4,317	5,864	4,339	5,864
Printing and stationery	48	91	484	2,337	532	2,428
Memberships and subscriptions	1,868	520	2,664	3,015	4,532	3,535
Insurance	-	-	4,989	4,891	4,989	4,891
Hospitality and sundry costs	185	53	106	331	291	384
Governance costs	37	57	287	216	324	273
Independent examination	56	-	1,393	1,380	1,449	1,380
Legal and professional	-	-	-	500	-	500
Repairs and maintenance	1,492	1,184	2,589	6,444	4,081	7,628
In kind services - landscaping works	-	5,348	-	-	-	5,348
Depreciation	32,663	32,440	-	-	32,663	32,440
Loan interest	1,221	1,365	-	-	1,221	1,365
<b>Total expenditure</b>	<b>186,417</b>	<b>92,181</b>	<b>236,105</b>	<b>273,284</b>	<b>422,522</b>	<b>365,465</b>
<b>Net income / (expenditure)</b>	<b>(25,830)</b>	<b>47,253</b>	<b>(27,872)</b>	<b>(28,690)</b>	<b>(53,702)</b>	<b>18,563</b>
<b>Transfers between funds</b>	<b>-</b>	<b>1,234</b>	<b>-</b>	<b>(1,234)</b>	<b>-</b>	<b>-</b>
<b>Net movement in funds</b>	<b>(25,830)</b>	<b>48,487</b>	<b>(27,872)</b>	<b>(29,924)</b>	<b>(53,702)</b>	<b>18,563</b>
<b>Fund balances brought forward</b>	<b>786,594</b>	<b>738,107</b>	<b>62,508</b>	<b>92,432</b>	<b>849,102</b>	<b>830,539</b>
<b>Fund balances carried forward</b>	<b>760,764</b>	<b>786,594</b>	<b>34,636</b>	<b>62,508</b>	<b>795,400</b>	<b>849,102</b>