

OTLEY ACTION FOR OLDER PEOPLE ANNUAL REPORT 2023/24



Dementia Information Roadshow – Otley, March 2024

Crossgate, Otley, LS21 3AA

Registered Charity Number 1150684

Company Number 8224902

Tel: 01943 463965

Website: www.otleyactionforolderpeople.org.uk

Email: info@otleyactionforolderpeople.org.uk

Aims and Objectives as set out in the “Articles of Association”

“The charity is established to relieve the following charitable needs of older people living in Otley, Pool and Arthington:

- 1) To relieve poverty
- 2) To preserve and protect good health
- 3) To advance education; and
- 4) To promote the social inclusion of such people who are excluded from society because they are house-bound, or who are unable to drive or easily access public transport and to assist them to integrate into society by such means as the trustees deem fit”.

Background

Otley Action for Older People (OAOP) is a long-established and successful community-based organisation working for the older population of Otley, Pool and Arthington. It was initiated in 1995 and granted charitable status in 1996. The original charity number was 1060379 and Otley Action registered with the Charity Commission at the time setting itself the clear objectives as listed in the original constitution.

OAOP is open to all people over 60 within the Otley, Pool-in-Wharfedale and Arthington areas. Otley Action for Older People is a member of the Leeds Neighbourhood Network Scheme (NNS) a network of voluntary sector organisations working with defined communities to identify and address local priorities and work in partnership with statutory services to support independent living for older people.

OAOP primarily targets activities and services to the needs of low-income older people, older people with disabilities and those threatened by or experiencing social exclusion. However, there is an open-door policy and thus activities are open to over the age of 60, except where there are defined criteria.

The organisation is in the northwest of the Leeds Metropolitan District. Otley, Pool and Arthington are set within a rural area and are outside the Leeds Regeneration Area.

According to the last census, there are over 4500 older people living within Otley (which equates to approximately 31% of the population in Otley, which stands at around 14,500). 3.1% were reported to be black, Asian or a minority ethnicity in Otley. OAOP currently has 1504 registered members, of which 0.6% are registered as black, Asian or a minority ethnicity. 60% of our members are aged between 75 and 84 and 31% are aged over 85. These figures show that over 30% of the eligible population in Otley are registered with Otley Action.

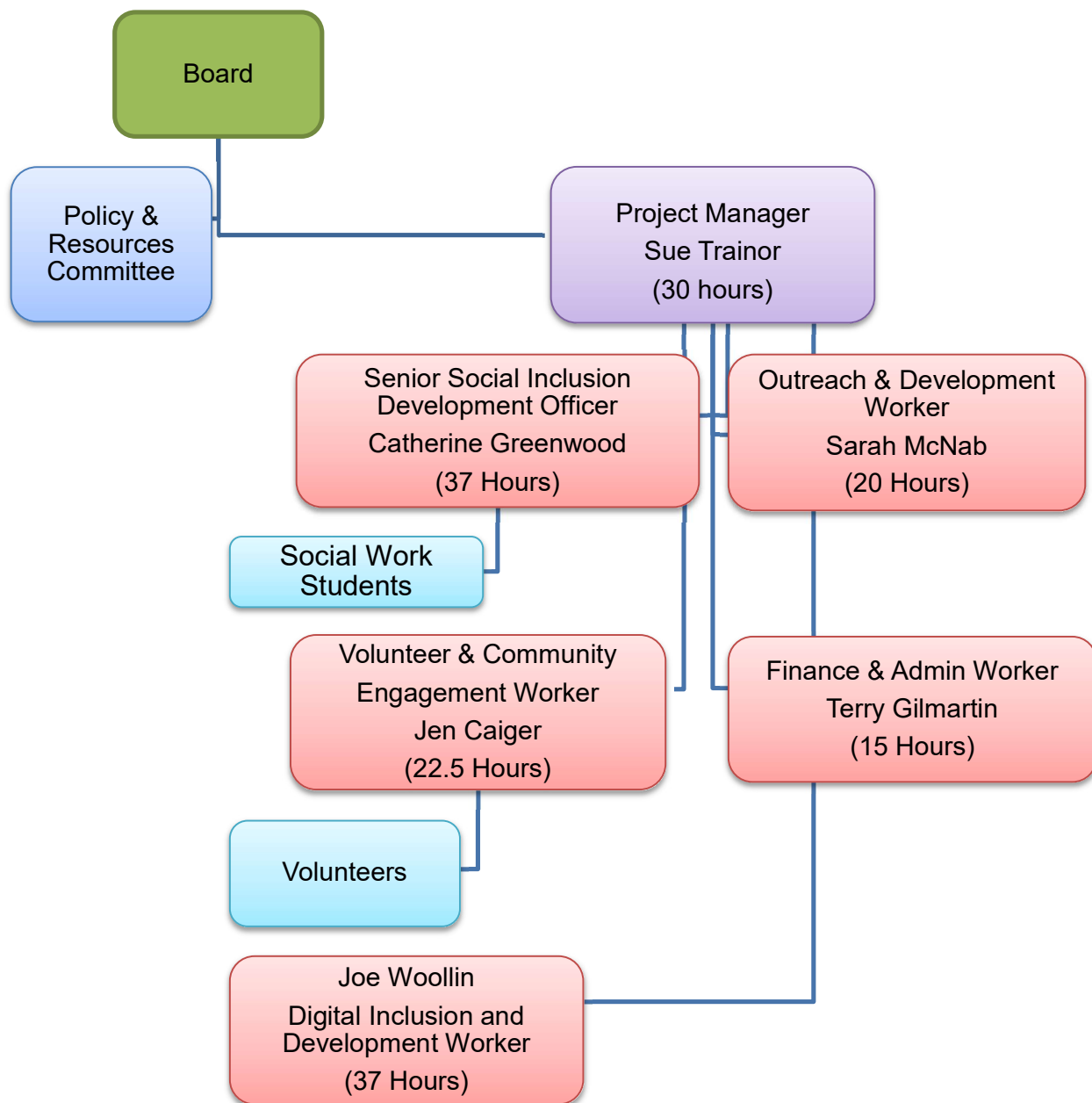
OAOP has six staff members to manage the workload of the charity. There are over 100 volunteers from a wide range of backgrounds and of varying ages and ethnicities. The volunteer workforce receives training and support and as such are competent and able to support our older people. The staff team organises, manages, and oversees the volunteers and provides practical and emotional support to them and our members. Our Board of Directors, made up of local older people and members

of the local community to ensure co-production in the development of services that are provided, and decisions made, provides governance of the organisation. We value our members and actively seek feedback from observation and consultation. Consultation and feedback from members is integral to our improvement policies and we actively seek this.

As an organisation, we have a continual improvement philosophy and a desire to increase the quality of services and outcomes available to older people.

Otley Action for Older People (OAOP) provides activities and services for adults over the age of 60. The primary aims focus on social inclusion and equality. This is enacted by enabling reductions in poverty, increasing active participation and providing person-centred support for people to live in their own homes for as long as possible.

Services include home visits, assessments, information and signposting, transport to hospital and doctors' appointments, wheelchair hire, shopping, lunch clubs, exercise classes, social groups and outings.



Board of Directors

2023/24

Ailsa Bearpark (Chair)

Gill Chapman

Tim Dalby

John Eveleigh

Doris Gagen

Nigel Gill

Pamela Gill

Frank Jordan (Secretary)

Pauline Padden (Treasurer)

Stuart Page

Arthur Parslow (resigned January 2023)

Company Secretary

Sue Trainor

Ailsa



Pauline



Frank



Tim



Pam



Nigel



John



Gill



Arthur



Doris



Stuart



In December 2023 we were sad to see one of our longstanding directors step down. Arthur Parslow joined as a volunteer in October 2010 and then later became a director and for many years the Treasurer. We want to say a big thank you to Arthur for his many years of devoted service and wish him well in the future.



Otley Action for Older People
Staff Team

Project Manager	Sue Trainor
Senior Social Inclusion Development Officer	Catherine Greenwood
Outreach and Development Worker	Sarah McNab
Volunteer & Community Engagement Officer	Jen Caiger
Finance and admin Worker	Terry Gilmartin
Digital Inclusion Development Worker	Joe Woollin



Catherine, Jen, Joe, Sarah, Sue, and Terry

***Social Work Students on
Placement in 2023/2024***

Aimee Oszoy Second Year Leeds Beckett University	(Passed)
Phoebe Thompson Second Year University of Leeds	(Passed)

Volunteers

We have a fantastic team of registered volunteers, with the eldest being 96! They bring a wealth of experience and expertise with them from diverse backgrounds, all with the common ethos of wanting to care for the older population of Otley, Pool and Arthington. Collectively, they are responsible for running the 15 Social Groups that we run every week.

There are currently 94 active volunteers registered with us, with a further 6 in the pipeline.

Our volunteers fall into several categories:

Befrienders – 26

Car Scheme – 19

Bus Drivers/Escorts – 13

Reception/Admin - 7

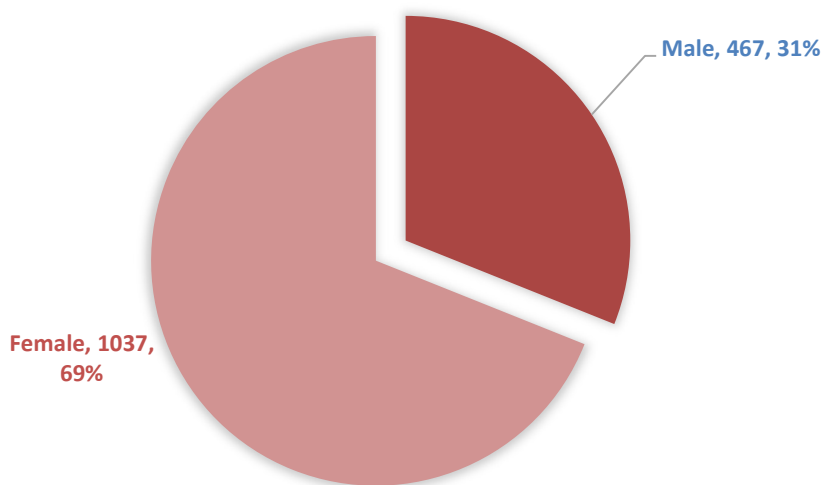
Group work – 25

Others – 4

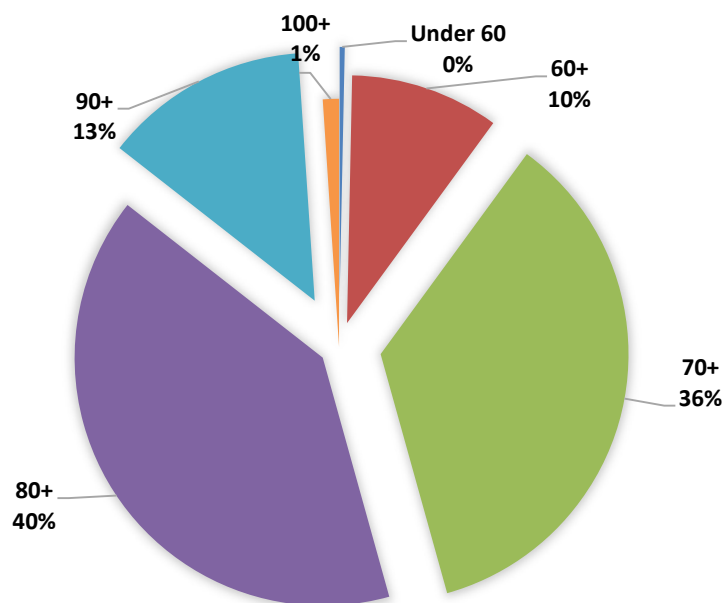
Our volunteer workforce is fundamental to the work we do, without them Otley Action would not be the force that it is or have the presence in Otley it has. We have grown steadily over the years, and this is largely due to the hard work and dedication of our volunteer workforce. We continue to be amazed at the commitment of our volunteers. Whether it is going above and beyond as a befriender or taking a lady to a hospital appointment 100 miles away – no job is too big or small and our army of volunteers will find a way to make things happen.

Otley Action Members

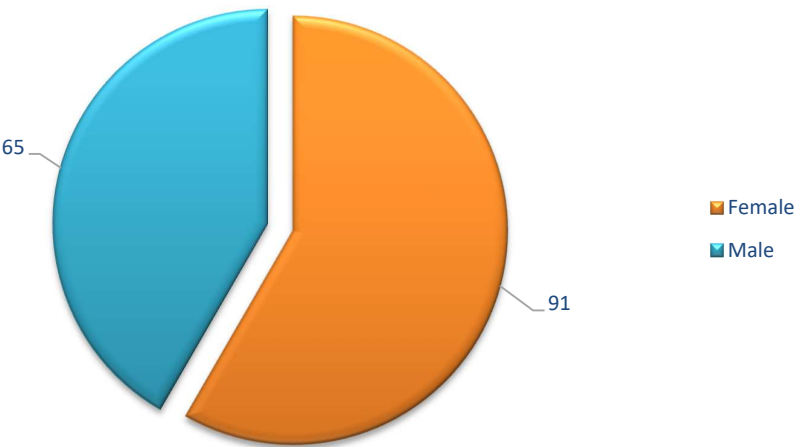
As of March 2024, we had 1504 members registered with Otley Action. There were 1037 women and 467 men. Of these members, 156 are registered as having memory loss. 91 of these are women and 65 are men.



AGE GROUPS OF SERVICE USERS



GENDER OF SERVICE USERS WITH MEMORY PROBLEMS



Chair's Remarks

A word from the Chair

It has been such a pleasure to see the progress and achievements of Otley Action for Older People (OAOP) over this last year. Sue and her team have worked together with our wonderful volunteers to keep providing a broad range of services to the community which are so appreciated by our many members. On top of that, they have developed new opportunities to assist with access to the digital world.

It's a measure of our success that OAOP has been featured on TV programmes twice in the last 12 months in connection with access to digital services and we have taken part in a national discussion forum.

Providing a service with an easily accessible point of contact and a warm welcome can make all the difference to a person's life and I'm very proud to be part of an organisation that does just that.

On behalf of the board of directors I would like to thank all those who contribute to the work of OAOP and importantly thank all our service users for their never-ending thanks and appreciation of the organisation. Take care of yourselves and keep doing what you do, you are amazing!

Ailsa Bearpark

Chair of Otley Action for Older People

Project Manager's Report

Project Manager's Report

Otley is a great town to grow old in for many reasons. From its wonderful location in the Lower Wharfe Valley, set between the bright lights of Leeds and the rolling hills of the beautiful Yorkshire Dales. The community is welcoming and there are plenty of opportunities to get involved and embrace a sense of belonging. Whilst I may be biased the icing on the cake is the many benefits and opportunities that Otley Action for Older People provide for the most senior citizens of the town.

Over the past 12 months, we have once again seen an increase in the number of people accessing services as well as the number of members now registered with us. 1504 at the last count.

Our reputation and profile are at an all-time high with acknowledgement, compliments and praise from service providers, service users and overall, anyone who knows of us being the norm. That said we are never complacent as our strength and all our good work is only possible thanks to our most amazing volunteer workforce. It never ceases to amaze me how hard-working, committed and persistent our volunteers can be. We can never speak too highly of them and the work that they do.

In 2023 thanks to the Big Lottery Fund we were able to develop our Let's Enable Otley project focusing on four key areas transport, digital inclusion, intergenerational and befriending and one-to-one work. With our Volunteer Co-ordinator and Digital Inclusion Development Worker in place we have been able to achieve great things.

Our digital inclusion work has raised our profile nationally appearing on both the BBC and ITV on current affairs programmes demonstrating how older people can be digitally excluded.

Our partnership with the Community Transport Association and the Department for Transport sadly came to an end but the legacy continued with our men's group which still meet and go out regularly on trips.

Throughout the year our minibus fundraising appeal continued as we successfully applied for grants to numerous funders eventually reaching our target. The Mercedes Sprinter van was ordered and eventually the vehicle arrived in the UK in early 2024 ready for conversion. We eagerly await its completion and delivery and are looking forward to putting it to good use.

Lots to look forward to.

Sue Trainor

Project Manager

Otley Action Activities

Regular Services and Activities from 01/04/2023 – 31/03/2024

Advice and Information

Registration of members
Support for Individuals &
community groups
Signposting and referrals
Newsletters

Transport and Mobility

OAOP minibus transport
Volunteer Car Scheme

Wheelchair Accessible
Transport – Wheelchair
Clamp
Wheelchair and
equipment loan

Social Activities

Fish and chip delivery
service.
Meal Deliveries
Lunch Club,
Mini-bus trips
Christmas and Easter Parties
Quizzes
Art class
Choir
Memory Café
Tai Chi
Zumba
Indoor Bowls
Community Café
Foot Health Care Clinic

Practical Help

Shopping support
Gardener vetting service
Contractor's list
Care and Repair referrals
Volunteering
IT and digital support

Social Care

Home visiting and
assessments
Befriending
Telephone contact
Blue Badge
Bus Passes
Attendance allowance
applications
Housing support
Form filling and financial
queries

Health Activities

Tai Chi classes
Chair-based Exercise
Zumba Gold classes
Winter indoor bowls
Outdoor Bowling

Regular Groups and Activities

This is our regular timetable of scheduled events.

Day	Activity	Venue	Time	Clients per week (Average)
Monday	Memory Café 1 st Monday of the month	Chippendale Centre	12pm	10
Monday	Quiz 2 nd Monday of the month	Chippendale Centre	12pm	22
Monday	Internet Café 1-3 pm every Monday	Chippendale Centre	1pm	12
Monday	Bingo every Monday	Labour Rooms	2pm	16
Monday	Welcome Space November-March	Chippendale Centre	1pm	10
Tuesday	Otley Luncheon Club	Chippendale Centre	12pm	25
Tuesday	Art Class	Chippendale Centre	2pm	14
Tuesday	Welcome Space November-March	Chippendale Centre	10am	10
Wednesday	Pool Luncheon Club	Wharfedale Court	12pm	18
Wednesday	Chair Based Exercise	Chippendale Centre	3pm	18
Thursday	Choir	Black Horse Courtyard	11am	13
Thursday	Otley Lunch Club	Chippendale Centre	1pm	28
Thursday	Tai-chi	Beech Hill Church	2pm	18
Friday	Indoor bowling (Seasonal)	Otley Methodist Church	10am	16
Friday	Community Café	Chippendale Centre	12.30pm	20
Friday	Zumba Gold	Bridge Church	2pm	22
Friday	Foot Clinic Every other month 2 x sessions	Otley Action Offices	12:30pm	14
Friday	Welcome Space November-March	Chippendale Centre	12:30pm	14

What happened in 2023/2024

Our service has seen a steady growth in membership over the last year. We are pleased to report that our weekly groups are running at 95% capacity across the board.

Service Delivery

In 2023 most of our social groups were 95% full which is great to see. More people than ever are seeking new experiences and the opportunity to meet and chat and make new friendships. We love to see this enthusiasm from our members.

Projects, Groups & Activities

The Big Lottery Community Fund

The end of year 2 evaluation for the Big Lottery was submitted. On the 14th of August 2023.

Jenny Dobson the funding Officer was delighted with our progress report. *“Many thanks for the information and budget update that you sent through. The project looks fantastic – so much going on and the progress since C-19 lockdown is amazing!”*

In the past 12 months we have developed all five key themes mentioned in the LEO (Let's Enable Otley) project. Transport, befriending, digital inclusion and community engagement being the four main ones. We are now in our third year of four and we intend to develop our intergenerational project.

Men's Group – Community Transport Association

In May 2022 we were advised that our application to the Community Transport Association had been successful. We had applied to the CTA to access DfT funding of £24,000 to support older men by tackling loneliness through transport. The project aimed to reach out to those socially isolated men and provide trips and outings to places of interest so that friendships could be formed. The project was very successful with over 40 men accessing the service over the course of the 10-month project. The project ran from July 2022 to May 2023.

Health and Wellbeing Event

On the 1st of October 2023, we hosted a health and wellbeing event at the Chippendale Centre. Stallholders from different holistic services attended including meditation, acupuncture, hypnotherapy, sensory services, and some charity stalls. We rounded off the day with a lovely yoga session run by Zac Clarke. The event was well attended with lots of positive feedback.

Otley Community Groups Network

As part of our Let's Enable Otley Project, Otley Action has continued to organise a Community Groups lunch where representatives from community groups can network and meet other people and groups and find out what's happening locally, sharing views about what the community might need. Our main aim has been to foster stronger ties within and between the community to allow further knowledge transfer and co-production.

The networking lunch has been successful and has met bi-monthly over this past year. We now have 35 member groups including 4 local churches, 4 local environmental groups, Otley Town Council, the local social prescribing team, Otley's high school, and the local food bank. This partnership development work has helped to increase the interconnectedness between services in the town.

Lytham Holiday

In October 2023 we enjoyed a lovely 3-night stay in Lytham. 8 service users stayed at the Clifton Park Hotel and enjoyed some lovely day trips and meals.

Bucket List Project

In September 2023 we launched a new 'Bucket List' project. The aim is to encourage our members to try new things and expand their horizons. The 14 members of the group compiled a list of experiences which were planned for the following months. This included: cocktail making, wreath making, trips to museums and a series of tea and talk sessions. The talks covered topics such as magnet fishing and an engineer's experience of working in Nigeria.

Leeds Community Anchor Network (LCAN)

OAOP received Household Support Funding (HSF) again in October 2023. A small pot of money to support individuals and families experiencing difficulties.

The Household Support Fund (HSF) is a central government fund. Leeds City Council (LCC) asked the Leeds Community Anchor Network (LCAN) to distribute money across the network and wider partners to cover all electoral wards of the city to support some of the most vulnerable families and individuals with food, fuel, and other essential costs. Otley Action were asked to support people in LS21.

Most of the fund was distributed to provide food, food vouchers and fuel costs. The grant could also be spent on other wider essentials and essential items in exceptional circumstances if needed. Along with providing food, food vouchers and fuel costs, most organisations involved with this project provided information and advice, as well as signposting to other services, such as Money Buddies and Green Doctor.

Volunteer Socials

We have organised multiple volunteer social events over the past year including monthly pub nights at The Black Horse, a summer social, and a Christmas party. All have been well attended, especially the Christmas party which took place on Thursday 7th December at The Chippendale Centre and had between 40-50 attendees.



Christmas Volunteer Social December 2023

Volunteer Showcase

On Saturday 16th March, Otley Action hosted a Volunteer Showcase at Otley Methodist Church in conjunction with the Community Network Lunch attendees. There were numerous stall holders providing information about a variety of volunteering opportunities in the town, plus free refreshments and a cake stall manned by our lovely volunteers and older people. These stalls included Otley 2030, Otley Courthouse, The Bridge Church, Otley Lions, Hug on a Tray, Friends of Chevin Forest, Otley Carnival and many more. The event was very well attended with a steady flow of interested parties dropping in throughout the day. Five new people were interested in getting more information or signing up for Otley Action on the day. It was an opportunity to highlight the amazing voluntary work that goes on in our town, whilst at the same time advertising all the volunteering opportunities out there. Throughout the day more than 100 people dropped in, in addition to the stall holders.

This was a first for us and given how successful the day was and the amount of positive feedback we've received, we will be looking into repeating this event next year.

Dementia Information Roadshow

In March 2024 we were delighted to host a Dementia Information Roadshow in conjunction with Leeds City Council, the Local Care Partnership and NHS partners. The event was hosted at Otley Methodist Church, with 17 stall holders and 7 speakers offering their expertise. The collective aim is to provide information and support to people who may be affected by Dementia, whether it be the person, their carers or family members.

On the day we saw approximately 115 people through the doors which exceeded our expectations as historically the event has attracted half those numbers. The event was rounded off with a beautiful choral performance from our Singing for Pleasure choir led by Thanda Gumede our extremely talented choirmaster.

Men's Group

Our Men's Group continues to thrive with a good attendance rate on our trips. We venture to museums, restaurants and even the seaside.

Weekly Wellbeing Phone Calls Scheme

There are currently 1504 members registered with the organisation. The weekly wellbeing phone call scheme aims to randomly contact members who don't typically attend a weekly group and have a general chat with them about how they are, and what we might be able to help them with. We cover

topics such as fuel poverty, access to food, keeping warm and social inclusion. The programme started in November 2023 and continues.

Digital Inclusion

Our internet café runs every Monday 1-3 pm. Our IT inclusion worker Joe has also been offering home visits and has proven to be very popular with lots of new requests for support.

Veg Boxes

We have been working with Otley 2030 every school holiday to box up fruits and vegetables and distribute them to vulnerable people in Otley. The fruit and veg is funded by donations to Otley 2030 and some of our volunteers help with the distribution. In addition, we manage the database of contact information for all those who receive the boxes. It has led to new members and a potential to share volunteer resources.

Community Café

The weekly café is popular with independent members who can get into town. Local councilor Penny Robinson attends most weeks and offers support and advice to members. Our foot clinic runs alongside the café (alternate monthly) and is run by Nicky Gifford.

Christmas Party

The Christmas Party was as popular as ever. We provided a lovely afternoon of festivities for 85 members. Spectacular entertainment from Emma James was followed by a visit from Father Christmas. We were so grateful to receive voluntary support, sherry and mince pies from Professional Leads an Otley-based company.



Members Christmas Party December 2023

OAOP Digital Inclusion Project 23/24 Summary

This summary provides an assessment of OAOP's Digital Inclusion work from March 2023 – April 2024.

Key

Digital Inclusion	DI
Digital Inclusion Project	DIP
Social Inclusion	SI
Home Visit	HV
Appointment	APPT
Internet Café	IC

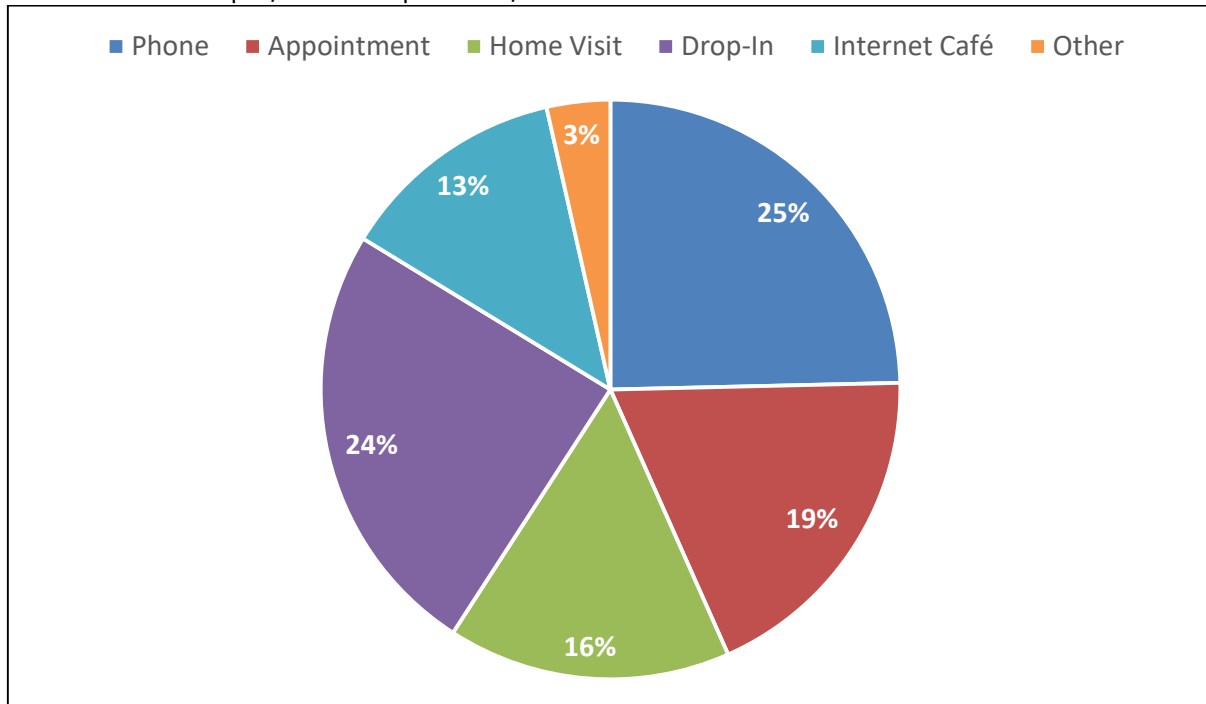
Statistics

- Data collected since 22/03/24, DIP spreadsheet records the form of contact. Total contact stats are summarised in the table below.

Fig. 1 DI Contact 22/03/23-19/04/2024

Contact Type	Number of Occurrences
Phone	354
Appointment	269
Home Visit	227
Drop-In	353
Internet Café	183
Other	51
TOTAL	1,437

Fig. 2 DI Contact 22/03/23-19/04/2024



Analysis

Assessing the response to and uptake of OAOP's DIP over the last year.

Phone Consultations

- 25% of all DI contact is by phone and may lead to an APPT/HV. Therefore, a single issue may result in two entries. Not stats inflation: this approach accounts for staff time within the demand statistics, ensuring numbers are a fair reflection of OAOP's workload.
- Call volume serves as a demand indicator and call content notes help manage the large DI caseload.
- Content details can be used to review service users' history of engagement with the DIP and allow the identification of patterns/trends.

Importance of Drop-In Availability

- 59% of all contact was in-person (24 % Drop-In, 16% HV and 19% APPT).
- 37% of all contact came from Drop-Ins (24% Drop-In + 13% IC).
- Therefore ~63% of all in-person contact was Drop-In.

Drop-in services are clearly needed. Support being readily available is often cited as a reason service users feel confident to adopt technology. Service users often refer to one-time, fixed curriculum courses as inadequate and reinforce that ongoing in-person support is essential. I feel the approachable and flexible nature of our DI support is a reason that uptake has been so encouraging. Speed of response is also important to ensure delivery aligns with the pace of our SI

work; DIP delivery had to meet the standards set by our existing work in order to integrate into the charity's recognised offering.

Appointments and Home Visits

- 35% of all contact was either APPT(19%) or HV(16%).
- 1-1 sessions are booked by service users or made by Joe following an interaction not resolved by Drop-In or Phone contact.

The ability to book follow-up sessions with individuals is the main benefit of having a full-time staff member dedicated to DI. Effective learning and development of service users' digital literacy requires sustained contact, with time for both repetition and trial of different approaches to embed knowledge. Offering 1-1 sessions both in OAOP and the home ensures that instruction and assistance is delivered where most effective and where service users are comfortable.

Final Thoughts

- The IT/Digital aspect of OAOP's offering is established and well known. Word of mouth and various publicity opportunities have contributed to this.
- Financial restrictions are an often-cited barrier to digital inclusion, but not one we have found ourselves tackling. Digital literacy is the barrier we encounter most. The current guise of the DIP, which focuses on providing 1-1 support, meets the DI needs of most service users.
- We have engaged with third parties such as GP surgeries, Leeds Council, British Telecom, AbilityNet, BBC and ITV; hopefully amplifying the cause of DI within our locality and further afield.

Otley Action for Older People – Social Inclusion and Outreach Summary

Catherine and Sarah head up the social inclusion and outreach programme at Otley Action. The programme offers a wide range of one-to-one support to Otley Action members, and any registered member can request an appointment. The programme is also supported by Social Work students while they are on placement. One-to-one support is provided face-to-face in the office or at the member's home.

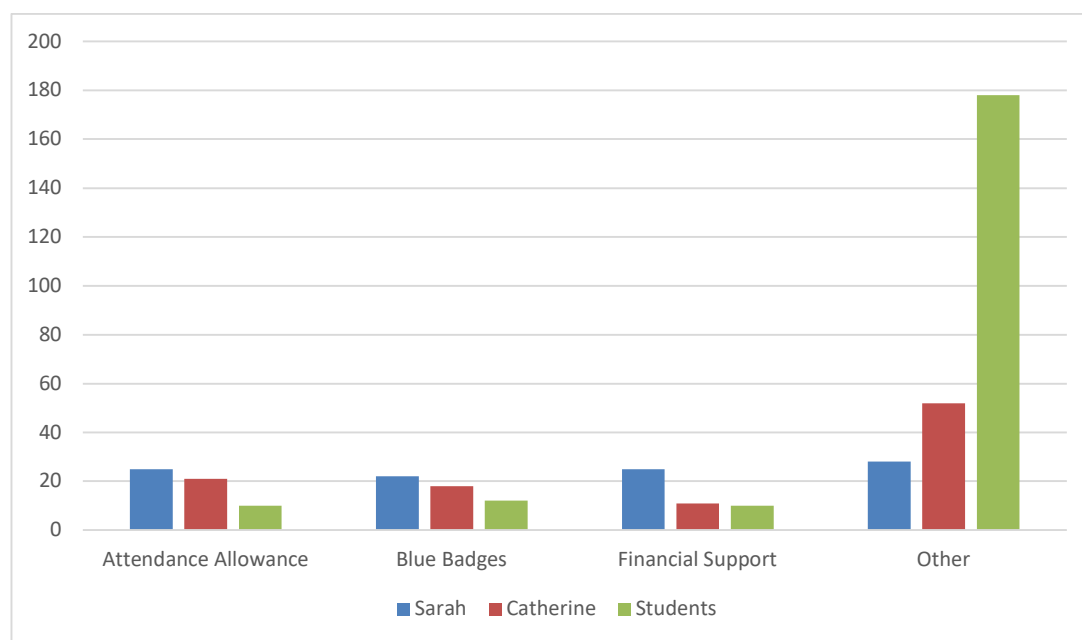
One to one support categories:

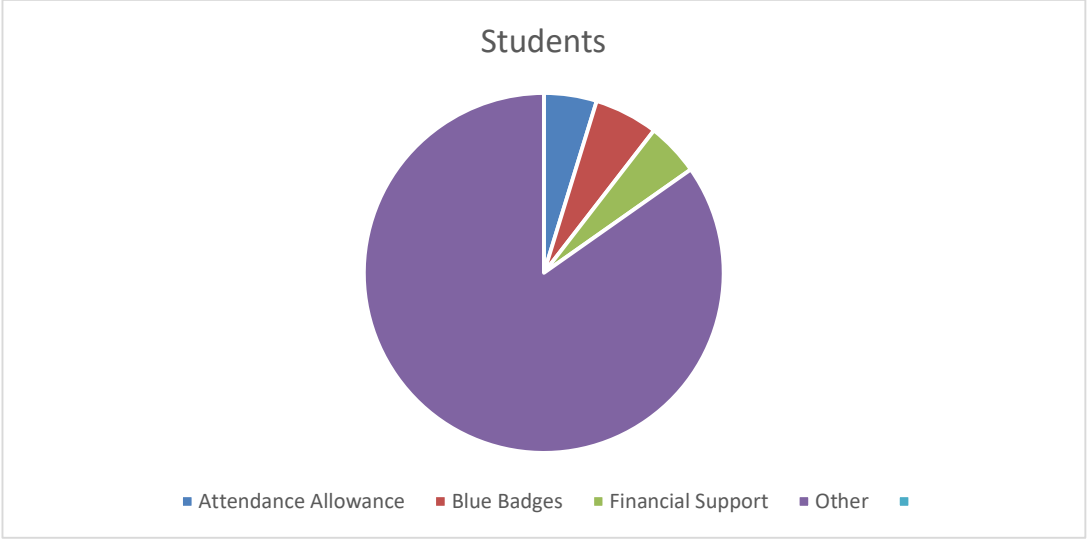
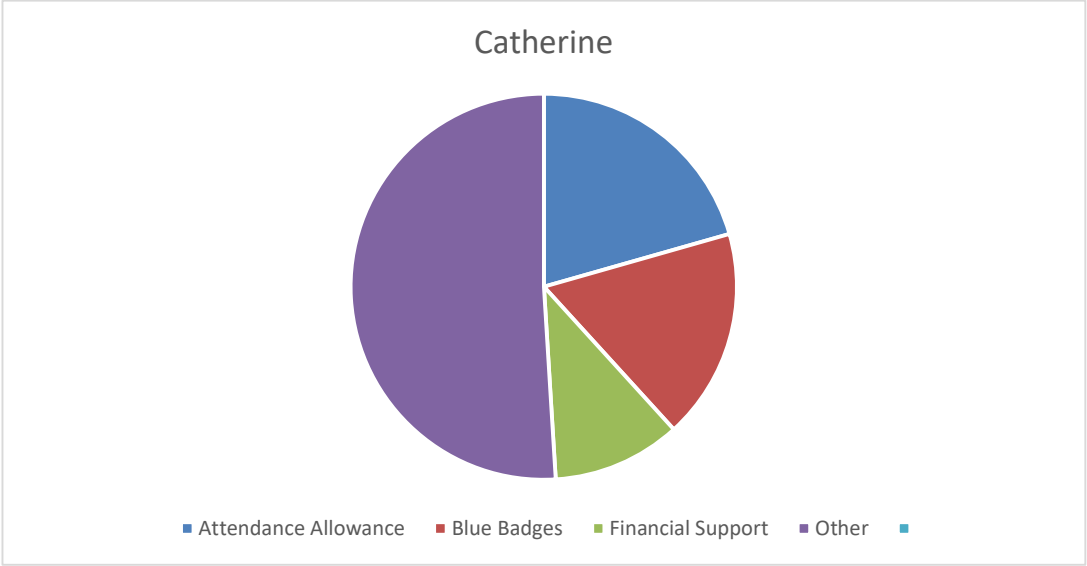
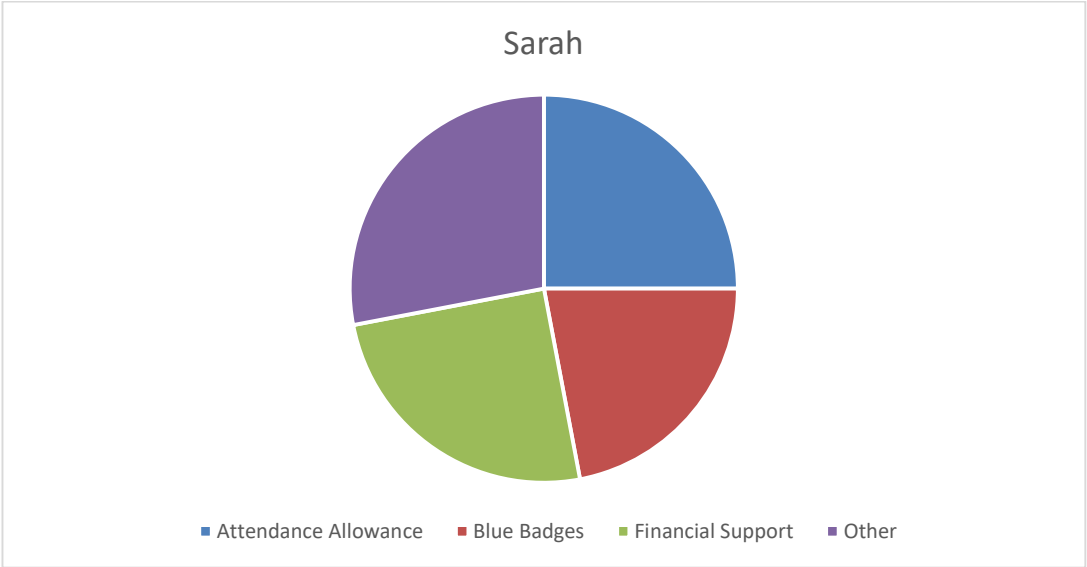
Attendance Allowance	Attendance Allowance Applications
Blue Badges	Blue Badge Applications
Financial Support	Financial support (pension queries, applications, benefit assessments)
Other	Other (housing, utilities, general enquiries, social inclusion)

The following figures are for the period 1st April 2023 to 31st March 2024.

Staff	Home Visits	Office Appointments
Sarah	56	44
Catherine	49	53
Social Work Students	150	60
TOTAL	255	157

The one-to-one support was split into the above categories as follows:





Summary

There is a slightly higher demand for home visits over office appointments. These tend to be our more frail and housebound members who can't get out under their own steam and do need more one-to-one support. We have seen an increase in demand for help with accessing pension and applying for benefits. This is due to so many services now moving online, and also the sharp rise in the cost of living.

Trips and Outings

Throughout the year Otley Action ran a range of trips and outings. We ran some ad-hoc trips during this period as we received regular requests for countryside drives and shopping trips. These included:

The Sound of Music – Yeadon Town Hall
Sunny Bank Mills
Temple Newsham
Grassington Day Trip
Boundary Mill
Salts Mill
Booths Shopping Trip
Kirkstall Bridge Shopping Centre
Lunch at the Sun Inn
Tong Garden Centre
Ilkley Cinema
Owlcotes Shopping Centre

Training

Date	Training	Number of attendees
20 th August 2023	Food Hygiene	15
25 th /27 th October 2023	Excel Spreadsheets - Staff	7
28 th February 2024	Dementia Friends	13
24 th January 2024	Safeguarding Vulnerable Adults	12

Otley Action Finance – Fundraising and Donations

Date	Project	Amount
03/04/2023	Leeds City Council - Core funding	£17,384.41
11/04/2023	Healthy Warm and Well – grant for meal deliveries	£3,705.00
12/04/2023	Housing Support Fund Supplementary Grant	£2,500.00
13/04/2023	Housing Support Fund	£555.00
18/04/2023	Pool Parish Council – Pool Party	£400.00
19/05/2023	Leeds City Council – Lunch Club Grant	£2,032.18
19/05/2023	Leeds City Council – Lunch Club Grant	£2,032.18
19/05/2023	Leeds City Council – Lunch Club Grant	£2,032.18
26/05/2023	Big Lottery Grant	£25,255.00
01/07/2023	Leeds City Council - Core funding	£17,384.41
07/07/2023	Awards For All – grant for the minibus fund	£10,000.00
26/07/2023	Housing Support Fund	£10,500.00
27/07/2023	Otley Rotary Club donation – disbanded	£360.83
31/07/2023	BSOG	£310.75
11/08/2023	Otley Town Council – Internet Café	£400.00
21/08/2023	Leeds City Council – Mice Money – train the trainer	£500.00
01/09/2023	Garfield Weston Foundation – General spending	£25,000
28/09/2023	Leeds Older People’s Forum – IDOP	£300.00
28/09/2023	Leeds Older People’s Forum – Brighter Days	£1,148.00
29/09/2023	Leeds City Council Core Funding	£17,384.41
10/10/2023	Mangoletsi Trust – came under transport review	£5,500.00
11/10/2023	Donation for the minibus fund – Andy Hinton	£1,000.00
26/10/2023	McCarthy and Stone – funding for small trips	£4,000.00
07/11/2023	Co-op – funding for minibus	£1,271.73
24/11/2023	Big Lottery Grant	£25,255.00
01/12/2023	BW Legal – grant for mens group, Xmas party and hampers	£2,600.00
15/12/2023	Leeds City Council – extra lunch club funding	£699.70
15/12/2023	Leeds City Council – extra lunch club funding	£699.70
15/12/2023	Leeds City Council – extra lunch club funding	£699.70
18/12/2023	BW Legal – mens group, Xmas party and hampers	£2,615.50
18/12/2023	HMRC – Gift Aid	£2,749.31

20/12/2023	Leeds Community Anchor Network – Welcome Space Grant	£6,100.00
29/12/2023	Leeds City Council – Core Funding	£17,634.41
18/01/2024	Yorkshire Building Society	£1,990.00
07/03/2024	Otley Town Council	£420.00
20/03/2024	Leeds Community Anchor Network – Listening Well Project	£1,100.00



Funding
Community
Transport

McCARTHY STONE
FOUNDATION

THE MANGOLETSI TRUST



**OTLEY ACTION FOR OLDER PEOPLE
DETAILED INCOME AND EXPENDITURE ACCOUNT
FOR THE YEAR ENDED 31 MARCH 2024**

		2024		2023
	£	£	£	£
Income				
Grants, Donations and Fundraising		329,673		187,991
Fees and Charges		9,915		7,403
Contributions to Activities		25,224		27,554
Luncheon Club		20,946		18,143
Community Car Scheme		2,549		2,166
Bank Interest		6,413		2,395
Student Placements		2,800		4,000
Employers Allowance		5,000		5,000
Introduction fee		657		-
Sponsorship		250		-
Utilities Compensation		-		1,000
Total Income		403,427		255,652
Expenditure				
Office and Room Rent	10,000		10,000	
Light and Heat	7,410		7,864	
Subscriptions	551		438	
Telephone	2,752		2,182	
Printing, Stationery & Postage	1,685		2,864	
Insurance	995		922	
Repairs, Renewals & Refurbishments	5,218		4,750	
I T Support & Equipment	4,241		4,800	
Independent Examination	1,550		1,500	
Professional Fees/Consultancy	13,898		12,040	
Miscellaneous	476		845	
Publicity	2,310		2,653	
		51,086		50,858
Minibus & Van Expenses	7,154		12,534	
Minibus Hire	-		6,720	
Trips, Social Events & Activities	39,417		28,977	
Luncheon Club	20,781		17,175	
		67,352		65,406
Salaries	128,031		105,048	
Employers National Insurance	10,137		8,166	
Staff Recruitment	-		212	
Pension Contributions	26,168		20,947	
Payroll Fees	1,124		895	
Training	1,620		695	
Volunteer Expenses	4,003		1,950	
DBS Checks	509		858	
		171,592		138,771
Total Expenditure		290,030		255,035
Net Surplus for the Year		113,397		617
Funds Brought Forward		235,704		235,087
Funds Carried Forward		349,101		235,704

OTLEY ACTION FOR OLDER PEOPLE

DIRECTORS' REPORT AND UNAUDITED ACCOUNTS

FOR THE YEAR ENDED 31 MARCH 2024

OTLEY ACTION FOR OLDER PEOPLE

ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

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1.	Significant Information
2.	Report of the Directors
3.	Independent Examiners Report
4.	Statement of Financial Activities
5.	Balance Sheet
6.	Statement of Cashflows
7 - 15	Notes to Accounts

OTLEY ACTION FOR OLDER PEOPLE

LEGAL AND ADMINISTRATIVE INFORMATION

Directors

John Eveleigh
Doris Gagen
Pamela Gill
Ailsa Bearpark
Nigel Gill
Gillian Chapman
Frank Jordan
Timothy Dalby
Pauline Padden
Stuart Page

Secretary

Susan Trainor

Charity number

1150684

Company number

08224902

Registered office

Otley Old Peoples Welfare Centre
Crossgate
Otley
West Yorkshire
LS21 3AA

Independent Examiner

Kevin J Meddings MAAT
Kevin Meddings Accountancy Services
55 Crowther Avenue
Calverley
Leeds
West Yorkshire
LS28 5SA

OTLEY ACTION FOR OLDER PEOPLE**LEGAL AND ADMINISTRATIVE INFORMATION (CONTINUED)**

Bankers

Virgin Money
94 – 96 Briggate
Leeds
West Yorkshire
LS1 6ND

Monmouthshire Building Society
Monmouthshire House
John Frost Square
Newport
Monmouthshire
NP20 1PX

The Charity Bank Ltd
Fosse House
182 High Street
Tonbridge
Kent
TN9 1BE

Charities Aid Foundation
Shawbrook Bank
Lutea House
Warley Hill Business Park
The Drive
Great Warley
Brentwood
Essex
CM13 3BE

Cambridge & Counties Bank
Charnwood Court
5b New Walk
Leicester
Leicestershire
LE1 6TE

OTLEY ACTION FOR OLDER PEOPLE

DIRECTORS' REPORT FOR THE YEAR ENDED 31 MARCH 2024

The trustees present their report and accounts for the year ended 31 March 2024.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's memorandum and articles of association and constitution, the Companies Act 2006 and the Charities Act 2011.

Structure governance and management

The charity is a company limited by guarantee and was incorporated on 21 September 2012. The charity was registered with the Charity Commission on 4 February 2013.

The directors who served during the year were:

John Eveleigh
Doris Gagen
Pamela Gill
Arthur Parslow (resigned 8 January 2024)
Ailsa Bearpark
Nigel Gill
Gillian Chapman
Frank Jordan
Timothy Dalby
Pauline Padden
Stuart Page

Appointment of Directors:

The charity may by ordinary resolution:

1. Appoint an existing member who is willing to act to be a director; and
2. Determine the rotation in which any additional directors are to retire.

No person other than a director retiring by rotation may be appointed a director at any general meeting unless:

1. He or she is recommended for re-election by the directors; or
2. Not less than 14, no more than 35 clear days before the date of the meeting; the charity is given a notice that:
 - a. Is signed by a member entitled to vote at the meeting;
 - b. States the member's intention to propose the appointment of a person as a director.

None of the directors has any beneficial interest in the company. All of the directors are members of the company and guarantee to contribute £10 in the event of a winding up.

All directors have voting rights.

Organisational Structure

Otley Action for Older People is managed by the directors in accordance with the Constitution and Memorandum and Articles of Association. The directors meet on a regular basis every 6 weeks with the Annual General Meeting held each year.

All decisions other than routine day-to-day planning and project management decisions are brought before the directors for discussion and ratification. The staff team report to the directors through regular written reports. There is a supervision structure within the staff team. The work of the organisation is also undertaken in keeping with our written policies (see below) and the conditions laid down by our various funders.

OTLEY ACTION FOR OLDER PEOPLE

DIRECTORS' REPORT (continued) FOR THE YEAR ENDED 31 MARCH 2024

Relationships

Otley Action is part of the Leeds Neighbourhood Network Scheme a highly regarded network of 36 organisations supporting older people throughout the city of Leeds. We work closely with the other networks within the geographical boundary.

We acted as the Leeds City Council Hub for Otley and Yeadon supporting people throughout the pandemic – doing so from May 2020 up until May 2023. We joined the Leeds Community Anchor Network in 2023 taking the lead in LS21 distributing the Housing Support Fund to those effected by the financial crisis. We also administered the payments for the Welcome Spaces throughout the area. We also partner with the Big Lottery Fund and are funded by them until August 2025. We are part of the Local Care Partnership running projects in partnership with health and social care and the voluntary sector. We work closely with Chevin Medical and Yeadon Health teams, the local medical centres. We partner with the social prescribing teams and regularly refer to and from them. Locally we are part of the Otley Community group consisting of Otley Town Council, local schools, churches, food bank to name a few. We have been working closely with Otley 2030 a relatively new group focusing on environmental issues. Each year Otley Action provides placements for Leeds Beckett University and Bradford University for Social Work students, providing work, supervision, and mentoring. Our partnership with the CTA (Community Transport Association) ended in June 2023 when the funding came to an end, but we continue to support the work that it supported.

Objectives and activities

The charity's objects are to relieve the following charitable needs of older people living in Otley, Pool and Arthington:

1. To relieve poverty.
2. To preserve and protect good health.
3. To advance education.
4. To promote the social inclusion of such people who are excluded from society because they are house-bound or who are unable to drive or easily access public transport and to assist them to integrate into society by such means as the directors deem fit.

The directors have complied with their duty to have due regard to guidance published by the Charities Commission with particular reference to the advancement of education and health and the relief of poverty. This is outlined further below.

Otley Action continues to work with some of the most frail and vulnerable older people in society. By March 2024, our membership exceeded 1,500. Many of those accessing services being between 80 -100 years old. Almost 20% of our registered members are now over the age of 90. Members include older people with physical disabilities, wheelchair users and wheelie walker and stick users, visual impairment, and those with dementia, depression, and anxiety issues. Many of these people are housebound and socially isolated and desperately in need of social interaction. These older people are unable to get out of their own homes without support and suitable transport that considers individual needs.

We continued to partner with Leeds City Council and Voluntary Action Leeds responding to the financial crisis by taking lead roles as a Welcome Space provider and a Housing Support Fund distributor.

OAOP received Household Support Funding (HSF) again in October 2023. A small pot of money to support individuals and families experiencing difficulties.

The Household Support Fund (HSF) is a central government fund. Leeds City Council (LCC) asked the Leeds Community Anchor Network (LCAN) to distribute money across the network and wider partners to cover all electoral wards of the city to support some of the most vulnerable families and individuals with food, fuel, and other essential costs. Otley Action were asked to support people in LS21.

OTLEY ACTION FOR OLDER PEOPLE

DIRECTORS' REPORT (continued) **FOR THE YEAR ENDED 31 MARCH 2024**

In March 2024 we were delighted to host a Dementia Information Roadshow in conjunction with Leeds City Council, the Local Care Partnership and NHS partners. The event was hosted at Otley Methodist Church, with 17 stall holders and 7 speakers offering their expertise. The collective aim to provide information and support to people who may be affected by Dementia, whether it be the person, their carers or family members. On the day we saw 115 people pass through the doors which exceeded our expectations. The event was rounded off with a beautiful choral performance from our Singing for Pleasure choir led by Thanda Gumede our extremely talented choir master.

The Social Inclusion and Outreach and Development programme at Otley Action offers a wide range of one-to-one support to Otley Action members, and any registered member can request an appointment. The programme is also supported by Social Work students whilst they are on placement. One to one support is provided face to face in the office or at the member's home. In this financial year over 400 appointments were registered.

The Otley Action Digital Inclusion Project has seen unprecedented demand for digital support. In this period there has been over 1,400 separate contacts with individuals including phone, drop ins, appointments, Internet Café attendees etc.

Our minibus fundraising campaign continued with vigour as we came closer to reaching our goal of replacing our existing VW Crafter with a brand-new bespoke Mercedes Sprinter. This vehicle is now due for delivery in June 2024.

The Community Network Lunch initiated by Otley Action continued to thrive in this period attracting new members. The bi-monthly event continues to provide a useful platform for community groups to come together and share their hopes and inspirations.

Throughout the year we have run groups addressing social isolation and loneliness; supporting people with anxiety and depression; low-level memory problems, dementia, and long-term conditions such as diabetes, arthritis, chronic obstructive pulmonary disease; supporting people to stay healthy; assistance with end-of-life issues and bereavement; supporting carers and help with advocacy.

Our car scheme has provided services to health-related appointments; one to one shopping services and outings.

Our befriending service provides one to one support for the loneliest and socially isolated who generally live alone. We provide lunch clubs; physical activities; the Memory and Inclusion project as well as the Internet Café.

OTLEY ACTION FOR OLDER PEOPLE

DIRECTORS' REPORT (continued) FOR THE YEAR ENDED 31 MARCH 2024

Policies

These are policies we have reviewed this year:-

Accessible Information Policy documents
 Bullying and Harassment Policy documents
 Complaints and Compliments Policy and Confidentiality Policy
 Data Protection Policy documents
 Disciplinary Policy documents
 Environment Policy documents
 Equality and Diversity Policy documents
 Financial Standing Order and Reserves Policy documents
 Grievance Policy
 Health and Safety Policy documents
 Lone Worker Policy documents
 Needs Risk and Support Planning
 Safeguarding Vulnerable Adults
 Training Policy documents
 Volunteering Policy documents
 GDPR Policy

Financial Review

The organisation made a surplus of £113,397 (2023 - surplus of £617 in this financial year).

The core activities of the organisation incurred a surplus of £86,828 prior to any fund transfers.

The total reserves of the organisation at 31 March 2024 amounted to £349,101. This includes an advanced deposit of £52,567 in respect of the purchase of a new Minibus. This is shown on the balance sheet as a prepayment.

Of this £84,762 relates to specific restricted funded projects and is due to be spent in the 2024/25 financial year. General reserves, now amount to £109,604 following a transfer of £34,180 to our designated Contingency Fund and are available to support current ongoing work of the organisation.

The organisation has 2 designated funds; the Contingency Fund referred to below and the Transport Fund which at 31 March 2024 had a balance of £9,720 and had been established to support the costs of running the Minibus.

The main risks that the organisation is subject to are covered through our insurance policies. There are, however, a number of risks which we cannot insure against including withdrawal or cessation of funding from outside bodies and the need to cover employee redundancy terms. It is, therefore, the policy of Otley Action for Older People to hold back a part of our resources as reserves to allow us to meet our obligations in the event of unexpected circumstances.

The organisations policy is to hold in a separate designated fund a sum equivalent to 6 months running costs which is approximately £145,015. Following a transfer of £34,180 from unrestricted funds this policy has been confirmed at the year end.

Investment Policy

Short term funds are placed in deposit accounts to maximise the Charity's income.

OTLEY ACTION FOR OLDER PEOPLE

DIRECTORS' REPORT (continued) **FOR THE YEAR ENDED 31 MARCH 2024**

Plans for the Future

We are looking forward to the arrival of a brand-new custom-built Mercedes Sprinter minibus with tailgate in June 2024. This bespoke vehicle is at the final stages before delivery to Otley is invaluable. This vehicle will set the organisation up for the next 10 years providing wheelchair accessible transport for older people with disabilities.

In 2024 we joined the Enhance project a partnership project working with Leeds Older People's Forum, Leeds Community Health (LCH) and AVSED. The pilot project is in its third year and if successful could attract future funding from LCH. The aim is to take pressure off the NHS by providing nonclinical intervention.

As we head into our final year of Big Lottery funding, we are now preparing for future applications. With the support of Third Sector Consultancy, we are conducting a comprehensive consultation with members, volunteers and staff. This will provide useful information in developing future services and for strategic planning.

Statement of Directors Responsibilities

The directors of Otley Action for Older People are responsible for preparing the Directors Annual report and accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the directors to prepare accounts for each financial year. Under company law the directors must not approve the accounts unless they are satisfied that they 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 that period. In preparing these accounts the directors are required to:-

- select suitable accounting policies and apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements that are reasonable and prudent;
- state whether UK accounting standards have been followed, subject to any departures disclosed and explained in the accounts; and
- prepare the accounts on a going concern basis unless it is inappropriate to presume that the charity will continue in business.

The directors are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of accounts may differ from legislation in other jurisdictions.

The directors are responsible for maintaining proper accounting records which disclose at anytime the financial position of the charitable company and to enable them to ensure that the accounts comply with the Companies Act 2006, and the Charities Act 2011. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

On behalf of the board of directors

Ailsa Bearpark

Director

Dated:

INDEPENDENT EXAMINERS REPORT

TO THE DIRECTORS OF OTLEY ACTION FOR OLDER PEOPLE

I report on the accounts of the charity for the year ended 31 March 2024 which are set out on pages 4 to 15.

Respective responsibilities of director and examiner

The directors of Otley Action for Older People are responsible for the preparation of the accounts. The directors consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the accounts under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- (iii) to state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a "true and fair view" and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:-

- (a) which gives me reasonable cause to believe that in any material respect the requirements:-
 - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - (ii) to prepare accounts which accord with the accounting records and to comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice; Accounting and Reporting by Charities; have not been met; or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Kevin J Meddings MAAT

Kevin Meddings Accountancy Services
 55 Crowther Avenue
 Calverley
 Leeds
 West Yorkshire
 LS28 5SA

Dated:

OTLEY ACTION FOR OLDER PEOPLE

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2024

	Note	General Fund £	Designated Fund £	Restricted Funds £	2024 £	2023 £
Income						
Donations and Legacies	2	114,027	-	7,268	121,295	22,335
Investment Income		6,413	-	-	6,413	2,395
		<u>120,440</u>	<u>-</u>	<u>7,268</u>	<u>127,708</u>	<u>24,730</u>
Income from Charitable Activities	3	131,268	10,606	133,845	275,719	230,922
		<u>131,268</u>	<u>10,606</u>	<u>133,845</u>	<u>275,719</u>	<u>230,922</u>
Total Income		<u>251,708</u>	<u>10,606</u>	<u>141,113</u>	<u>403,427</u>	<u>255,652</u>
Expenditure						
Charitable Activities	4	164,880	7,154	117,996	290,030	255,035
		<u>164,880</u>	<u>7,154</u>	<u>117,996</u>	<u>290,030</u>	<u>255,035</u>
Total Expenditure		<u>164,880</u>	<u>7,154</u>	<u>117,996</u>	<u>290,030</u>	<u>255,035</u>
Net Income/ Net movement in funds before transfers		86,828	3,452	23,117	113,397	617
Transfer between funds		(28,180)	34,180	(6,000)	-	-
		<u>(28,180)</u>	<u>34,180</u>	<u>(6,000)</u>	<u>-</u>	<u>-</u>
Net Income/ Net Movement in funds after transfers		58,648	37,632	17,117	113,397	617
Total funds brought forward		<u>50,956</u>	<u>117,103</u>	<u>67,645</u>	<u>235,704</u>	<u>235,087</u>
Total funds carried forward		<u>109,604</u>	<u>154,735</u>	<u>84,762</u>	<u>349,101</u>	<u>235,704</u>

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

OTLEY ACTION FOR OLDER PEOPLE

BALANCE SHEET AS AT 31 MARCH 2024

	Notes	General fund	Designated funds	Restricted funds	2024 Total funds	2023 Total funds
Fixed Assets	7	-	-	-	-	-
Current Assets						
Cash at Bank and in Hand		114,401	154,735	32,195	301,331	242,108
Debtors and prepayments	8	-	-	52,567	52,567	2,100
Total Assets		114,401	154,735	84,762	353,898	244,208
Creditors: Amounts Falling Due Within One Year	9	(4,797)	-	-	(4,797)	(8,504)
Total Assets less Current Liabilities		109,604	154,735	84,762	349,101	235,704
The Funds of the Charity						
Restricted Funds	11	-	-	84,762	84,762	67,645
Unrestricted Funds						
Designated Funds	12	-	154,735	-	154,735	117,103
General Fund		109,604	-	-	109,604	50,956
Total Charity Funds		109,604	154,735	84,762	349,101	235,704

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2024. No member of the company has deposited a notice, pursuant to section 476, requiring an audit of these accounts.

The directors acknowledge their responsibilities for ensuring that the company keeps accounting records which comply with section 386 of the Act and for preparing accounts which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

These accounts have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The accounts were approved by the Board on

Ailsa Bearpark

Director

Company Registration No: 08224902

OTLEY ACTION FOR OLDER PEOPLE

STATEMENT OF CASHFLOWS
AS AT 31 MARCH 2024

	Notes	2024 £	2023 £
Cash generated by operating activities	14	52,810	936
Cashflow from investing activities			
Interest income		6,413	2,395
Increase in cash equivalents in the year		59,223	3,331
Cash equivalents at the beginning of the year		242,108	238,777
Total cash equivalents at the end of the year		301,331	242,108

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

1. Accounting Policies

a. Accounting Convention

The accounts are prepared under the historical cost convention unless otherwise stated.

The accounts are prepared in accordance with Accounting and Reporting by Charities; Statement of Recommended Practice (SORP) applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) published on 16 July 2014, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102) the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice as it applies from 1 January 2015.

The charity constitutes a public benefit entity as defined by FRS102.

Having considered future planned activities and the resources available to the charity, the directors are satisfied that the financial statements should continue to be prepared on the going concern basis.

b. Incoming Resources

Donations and legacies are included in full in the Statement of Activities when receivable.

Fees and charges, income from activities and all other related income is accounted for when received by the charity.

Income from investments is included in the year in which it is receivable.

Revenue grants for specific projects are credited to the Statement of Financial Activities when received and unspent amounts are carried forward in the form of restricted reserves.

c. Resources Expended

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any VAT which cannot be recovered and is reported as part of the expenditure to which it relates.

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for beneficiaries.

Governance costs includes those costs associated with meeting the constitutional and statutory requirements of the charity.

All costs are allocated between the expenditure categories on the Statement of Financial Activities (SOFA) on a basis designed to reflect the use of the resource.

d. Tangible Fixed Assets and Depreciation

Tangible fixed assets are stated at cost less depreciation. Depreciation is provided at rates calculated to write off the cost less estimated residual value of each asset over its expected useful life as follows:-

Tools and Equipment	4 years
Office Equipment	4 years
Motor Vehicles	4 – 10 years

e. Taxation

As a registered charity the association 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.

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

f. **Pensions**

The charity contributes to deferred contribution pension schemes for all of its employees.

g. **Fund Accounting**

Unrestricted funds are available to spend on activities that further any of the purposes of the charity. Funds may be designated at anytime by the directors if such a purpose is identified.

Restricted funds are subject to specific conditions by donors as to how they may be used.

2. Donations and Legacies

	2024 £	2023 £
Donations:		
Crowdfunder	3,563	2,277
CAF Charity Vouchers	2,500	3,500
Legacy of James Brannigan	95,310	-
Yorkshire Building Society	1,990	-
Co-op Local Community Fund	1,272	-
Legacy of Keith Foster	1,000	-
Trustees of Abbey House	500	-
Skipton Building Society	500	-
Lymm Mayo Community Shop Trust	500	-
Rotary Club of Otley Chevin	361	-
Otley Chamber of Trade	270	-
Otley Swimming Club		1,198
Westbourne Masonic Lodge		550
Washburn Heritage		539
Waitrose		500
Donations and Fundraising	13,529	13,771
	<hr/>	<hr/>
	121,295	22,335
	<hr/>	<hr/>

3. Income from Charitable Activities

	General £	Designated £	Restricted £	2024 Total £	2023 Total £
Grants for unrestricted purposes	94,788	-	-	94,788	69,538
Grants for restricted purposes	-	691	112,899	113,590	96,118
Contribution to Activities	27,773	-	-	27,773	29,720
Fees & Charges	-	9,915	20,946	30,861	25,546
Student Placements	2,800	-	-	2,800	4,000
Employers Allowance	5,000	-	-	5,000	5,000
Introduction fee	657	-	-	657	-
Sponsorship	250	-	-	250	-
Utilities Compensation	-	-	-	-	1,000
	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
	131,268	10,606	133,845	275,719	230,922
	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

	2024 £	2023 £
Grants for unrestricted purposes		
Leeds City Council	69,788	69,538
Garfield Weston Foundation	25,000	-
	<hr/>	<hr/>
	94,788	69,538
	<hr/>	<hr/>

	2024 £	2023 £
Grants for Restricted and Designated Purposes		
Leeds City Council Luncheon Club	8,196	7,848
Leeds City Council Hub Funding	15,405	10,500
Bus Service Operators Grant	691	311
The National Lottery Community Fund Lets Enable Otley	50,510	48,350
Otley Town Council	820	820
Awards For All	10,000	-
Leeds City Council Welcome Space Fund	6,100	-
The Mangoletsi Trust	5,500	-
BW Legal Services	5,215	-
The McCarthy & Stone Foundation	4,000	-
Leeds Older Peoples Forum (Meal Deliveries)	3,705	-
Leeds Older Peoples Forum (Brighter Days)	1,148	-
Leeds Community Anchor Network	1,100	-
Leeds City Council	500	-
Pool Parish Council	400	-
Leeds Older Peoples Forum (Health and Wellbeing Event)	300	-
Community Transport Association	-	24,000
Charles & Elsie Sykes Trust	-	2,000
Leeds Mind	-	1,000
Home Instead Ilkley	-	500
Leeds City Council (MICE)	-	450
Windmill Community Transport	-	339
	<hr/>	<hr/>
	113,590	96,118
	<hr/>	<hr/>

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

4. Charitable Activities

	2024 £	2023 £
Office and Room Rent	10,000	10,000
Light and Heat	7,410	7,864
Subscriptions	551	438
Telephone	2,752	2,182
Printing, Stationery & Postage	1,685	2,864
Insurance	995	922
Repairs, Renewals and Refurbishments	5,218	4,750
I T Support & Equipment	4,241	4,800
Professional Fees/Consultancy	13,898	12,040
Miscellaneous	476	845
Publicity	2,310	2,653
Minibus & Van Expenses	7,154	12,534
Minibus Hire	-	6,720
Trips, Social Events & Activities	39,417	28,977
Luncheon Club	20,781	17,175
Salaries	128,031	105,048
Employers National Insurance	10,137	8,166
Staff Recruitment	-	212
Pension Contributions	26,168	20,947
Payroll Fees	1,124	895
Training	1,620	695
Volunteer Expenses	4,003	1,950
Governance Costs (note 5)	2,059	2,358
	<hr/>	<hr/>
	290,030	255,035
	<hr/>	<hr/>

5. Governance Costs

	2024 £	2023 £
DBS Checks	509	858
Independent Examiner's Fee	1,550	1,500
	<hr/>	<hr/>
	2,059	2,358
	<hr/>	<hr/>

6. Staff Costs

	2024 £	2023 £
Salaries	128,031	105,048
Employers National Insurance	10,137	8,166
Pension Contributions	26,168	20,947
	<hr/>	<hr/>
	164,336	134,161
	<hr/>	<hr/>

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

The charity considers its key management personnel to be the Directors and the Project Manager Susan Trainor.

The average number of employees during the year including part time was 6 (2023 – 5).

No employee earned more than £60,000.

None of the directors (or any person connected with them) received any remuneration or were reimbursed expenditure during 2024 (2023: none).

We can confirm that there are no related party transactions that require disclosure in the accounts (2023: none).

7. Fixed Assets

	Motor Vehicles £	Tools & Equipment £	Office Equipment £	Total £
Cost				
At 1 April 2023				
And 31 March 2024	80,555	12,093	21,639	114,287
	<hr/>	<hr/>	<hr/>	<hr/>
Depreciation				
At 1 April 2023				
And 31 March 2024	80,555	12,093	21,639	114,287
	<hr/>	<hr/>	<hr/>	<hr/>
Net Book Value				
At 31 March 2024	-	-	-	-
	<hr/>	<hr/>	<hr/>	<hr/>
At 31 March 2023	-	-	-	-
	<hr/>	<hr/>	<hr/>	<hr/>

8. Debtors and prepayments

	2024 £	2023 £
Minibus deposit	52,567	1,000
Prepayments	-	1,100
	<hr/>	<hr/>
	52,567	2,100
	<hr/>	<hr/>

9. Creditors and accruals

	2024 £	2023 £
Accruals	4,797	8,504
	<hr/>	<hr/>

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

10. Pension and other past-retirement benefit commitments Defined Contributions

	2024 £	2023 £
Contributions payable by the charity during the year	26,168	20,947

11. Restricted Funds

	Balance at 1 April 2023	Movement in Funds		Transfers	Balance at 31 March 2024
	£	Incoming Resources £	Resources Expended £	£	£
Luncheon Clubs	18,584	29,142	(20,781)	(6,000)	20,945
Leeds City Council Hub Funding	-	15,405	(15,405)	-	-
Otley Town Council	140	820	(960)	-	-
The National Lottery Community Fund					
Lets Enable Otley	18,417	50,510	(51,882)	-	17,045
Minibus Fund	24,504	6,768	-	15,500	46,772
Community Transport Association	4,800	-	(4,800)	-	-
Charles & Elsie Sykes Trust	1,200	-	(1,200)	-	-
Awards For All	-	10,000	-	(10,000)	-
Leeds City Council Welcome					
Spaces Fund	-	6,100	(6,100)	-	-
The Mangoletsi Trust	-	5,500	-	(5,500)	-
BW Legal Services	-	5,215	(5,215)	-	-
The McCarthy & Stone Foundation	-	4,000	(4,000)	-	-
Leeds Older Peoples Forum					
(Meal Deliveries)	-	3,705	(3,705)	-	-
Leeds Older Peoples Forum					
(Brighter Days)	-	1,148	(1,148)	-	-
Leeds Community Anchor Network	-	1,100	(1,100)	-	-
Leeds City Council	-	500	(500)	-	-
Lymm Mayo Community Shop Trust	-	500	(500)	-	-
Pool Parish Council	-	400	(400)	-	-
Leeds Older Peoples Forum					
(Health & Wellbeing Event)	-	300	(300)	-	-
	67,645	141,113	(117,996)	(6,000)	84,762

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

Restricted Funds:-

Luncheon Club

There are currently three luncheon clubs held every week on a Tuesday, Wednesday and Thursday. Two of the lunch clubs are in Otley and the third one is in Pool on a Wednesday. A healthy and nutritious two-course lunch with tea or coffee is available for a small charge. Otley Action receives a grant for each of the lunch clubs from Leeds City Council.

Leeds City Council Hub Funding

In 2023 the Leeds City Council (LCC) Hubs that had supported vulnerable people throughout the pandemic finally came to an end. Both LCC and Voluntary Action Leeds (VAL) recognised the value in the network that had emerged and wanted to utilise this to the good of the community. The Leeds Care Anchor Network (LCAN) was founded on the back of the Hub model. The Otley Action For Older People Board eventually decided to join in 2023 after much deliberation

Otley Town Council

£140 remained of the money received in the previous financial year which was to be spent on bi-monthly lunches for the purpose of networking meetings. This was all spent by the end of this financial year.

In this current financial year, a further £420 was received to enable Otley Action to continue to take the lead on the Community Network lunches including applying for and managing the funding to pay for the lunches and room hire.

Additionally, a further £400 was received to support the expansion of the Internet Café from monthly to weekly at the Chippindale Centre.

The National Lottery Community Fund Lets Enable Otley

A four-year project funded by the Lottery Community Fund to employ a Volunteer and Community Engagement Officer. The total amount awarded over four years is £199,346. The project will allow Otley Action to consolidate their current activities (using volunteer and community resources) and use staff time to focus on core support. This is an increasing part of our service as referrals continue to become more complex and require the skills, knowledge and dedication of experienced and qualified members of staff. It has also played a big part in support of our digital inclusion project,

Minibus Fund

This fund was established to raise money towards the purchase of a new vehicle. To kickstart the fund an initial sum of £20,000 was allocated to it and since then we have received further donations from members, the public at large and in this year both Awards For All and the Mangoletsi Trust.

Community Transport Association

Funding received in the previous financial year from the CTA through a Department of Transport initiative to reduce loneliness through transport by running trips for men to places of interest. This funding ran until May 2023.

Charles & Elsie Sykes Trust

Funding received in the previous financial year to run a men's support group.

Awards For All

Funding towards the purchase of the new Minibus.

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

Leeds City Council Welcome Spaces Fund

This has enabled us to give onward support to community organisations in our neighbourhood who wish to deliver activities that can bring people together in Welcome Spaces. For instance, an organisation might need a contribution to their energy bills or room hire costs. The amount distributed to each organisation is decided by Otley Action using our local knowledge of the hours required, communities covered, and funding necessary.

The Mangoletsi Trust

Funding towards the purchase of the new Minibus.

BW Legal Services

BW Legal Services visited the offices of Otley Action to make a short film for their colleagues to give a comprehensive review of what we do. As a result of the success of the film they made a significant contribution towards the cost of our Christmas Party and the provision of gift vouchers for all those who attended the event.

The McCarthy & Stone Foundation

Funding to support more trips throughout the winter with less passengers with the intention of reducing travel time for the most frail and vulnerable.

Leeds Older People Forum (Meal Deliveries)

This money was to initially support the Warm Spaces until the end of June 2023 and provide a meal delivery service 5 days a week.

Leeds Older Peoples Forum (Brighter Days)

This was money received from the Brighter Days Fund to support the Community Café from October to December 2023.

Leeds Community Anchor Network

Otley Action were recruited to take part in a listening exercise. The purpose of the Project is to highlight people's likes and dislikes of their local communities and to look at how things can be improved.

Leeds City Council

Funding to train one of our employees to become a Moving and Handling Trainer to support our volunteer workforce.

Lymm Mayo Community Shop Trust

Two donations of £250 were received to purchase specific items for our Service Users.

Pool Parish Council

We received funding towards the Pool Easter Party at Pool Methodist Church on Thursday 28 March. Well over 50 residents attended and entertainment was provided by Christopher and the Robins who went down a storm.

Leeds Older Peoples Forum (Health & Wellbeing Event)

Money for a Health and Wellbeing event on 1 October 2023.

OTLEY ACTION FOR OLDER PEOPLE

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

12. Designated Funds

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2023	Movement in Funds		Transfers	Balance at 31 March 2024
	£	Incoming Resources £	Resources Expended £	£	£
Contingency Fund	110,835	-	-	34,180	145,015
Transport Fund	6,268	10,606	(7,154)	-	9,720
	<u>117,103</u>	<u>10,606</u>	<u>(7,154)</u>	<u>34,180</u>	<u>154,735</u>

13. Commitments under operating leases

At 31 March 2024 the company had annual commitments under non-cancellable operating leases as follows:

	Land and Buildings	
	2024 £	2023 £
Expiry date within one year	11,400	10,000
Expiry date within two to five years	11,400	10,000

14. Reconciliation of net movement in funds to net cashflow from operating activities:

	2024 £	2023 £
Net movement in funds	113,397	617
Deduct interest income	(6,413)	(2,395)
(Increase) in debtors	(50,467)	(2,100)
(Decrease)increase in creditors	(3,707)	4,814
Net cash generated by operating activities	<u>52,810</u>	<u>936</u>