

# Supporting Older People CIO



## Annual Report

**For the year to 31<sup>st</sup> March 2022**

Community House  
46-50 East Parade  
Harrogate  
HG1 5RR

Tel: 01423 531490  
Email: [sop.harrogate@gmail.com](mailto:sop.harrogate@gmail.com)  
[www.supportingolderpeople.org.uk](http://www.supportingolderpeople.org.uk)

Charity No. 1155682

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## Welcome from the Chair



We have come to the end of another challenging but rewarding year. This year saw us restart, regroup and move forward coming out of the pandemic. We have successfully restarted our face-to-face befriending, our day trips and other groups such as tea and talk. It is worth reflecting on the fact that demand has increased across all our activities, perhaps this is as a result of coming out of the pandemic. Our beneficiaries are once again taking part and enjoying the activities Supporting Older People offers.

The continual drive for funding has seen a very positive year. This puts us in a steady position as we move into 22/23 in which we need to prepare and plan for the end of the NYCC Wellbeing and Prevention contract.

Our grateful thanks go to all our funders, and our colleagues at NYCC, for their support and encouragement as we tackle what is a very competitive process to apply for grant funding. This environment is unlikely to improve, indeed with the challenges with cost of living rises the environment may be even more challenging. but we have built a strong reputation with a strong an impressive offer which leaves us in as good as position as possible as we move into 22/23.

Last, but certainly not least, I on behalf of the Trustees, would like to offer a massive thank you to all our volunteers without whom we couldn't provide the services we do. Kate, Julia and Lorna continue to rise to the challenge of increasing demand and getting the show back on the road - we couldn't help our beneficiaries without you three ladies! And to my fellow Trustees who have supported me in this role, and continue to steer "Supporting Older People" with their experience and expertise. Thank you!

Julie Barlow

A handwritten signature in grey ink, appearing to read 'Julie Barlow'.

Chairman

## Introduction from the Director



At the end of last year's report, I wrote that Supporting Older People were continuing to provide telephone befriending and a food project instead of our core activities and so we were delighted to restart face to face befriending and our activities' programme during 2021. In our Befriending and Activities' Report, you will read, and we share case studies about how our return to face-to-face befriending and group activities brought enormous joy to our members and volunteers and the positive impact on the mental and physical wellbeing of our members which resulted from this. It was wonderful to be back in the office with our amazing team of Julia Lightfoot and Lorna Daniel, after so many months working from home.

Referrals and demand for our services have grown. Financially we ended the year on a positive footing after several months at the start of the year when we were concerned about future funding as competition for grants was extremely fierce. We are extremely grateful to our colleagues at North Yorkshire County Council, especially Liz Meade from the Stronger Communities Team and Helen Sams and Helen Thirkell from their Commissioning Team for their support, encouragement and for funding an external consultant, Nick Scott, to help us diversify our funding base and strategic plan. They also added us to the group of Community Support Organisations working across the county and this additional funding was invaluable. Large grants from the Two Ridings' Community Foundation amongst others also demonstrated to us how much our small charity is valued within the county. This was also apparent when, together with the CEO of Nidderdale Plus, I was privileged to be invited to represent the voluntary sector in North Yorkshire at the Duchess of Cambridge's Carol Service at Westminster Abbey. It is important that we maintain this momentum as we prepare for the end of the NYCC Wellbeing and Prevention contracts in 2022-23.

We have continued to develop strong partnerships with our colleagues from NYCC, especially the Living Well Teams and with other organisations across the public and voluntary sectors. We have raised our profile on social media and in the local press thanks to our Trustee, Jenny Hudlestone of Avem Marketing and were thrilled to be featured by ITV Calendar in a piece about the impact of our befriending service, interviewing members and a volunteer about the difference it has made to their lives.



I would like to take this opportunity to thank our trustees for their vision, guidance and support, especially Julie Barlow, our chair, who has ably steered us through some choppy waters this year. We would not exist without our volunteers, who go the extra mile to make a difference to the lives of the older people they are matched with.

Finally, I would like to thank my wonderful colleagues, Julia and Lorna, for their continued dedication, commitment and innovation which places us in a strong position to meet the challenges ahead. It is our 40th anniversary in 2022-23 and we will share the events we are holding to celebrate in next year's report – here's to the next 40 years!

# The Facts

## Charitable Objectives

Supporting Older People's mission is to provide relief of elderly persons, being over 60 years, living in Harrogate and the surrounding area, by such charitable means as the trustees determine, including the provision of:

- A befriending and visiting service
- Social events
- Advice, information and support for elderly people and their carers
- The training of volunteers

12,000 meals prepared by Paul Welch which we delivered to our clients.

We currently have 234 clients.

75 of our clients have asked us to contact them each month about our tea & talk with an average monthly attendance of 42.

42 clients came along to our re launch event at Hotel Du Vin.

We currently have 102 volunteers.

Taking an average of one hour a week over a yearly period our befrienders give 7800 volunteering hours per year. Using the Living Wage this would amount to £74,100 per year.

# Supporting Older People's Activities

April 2021 saw the country still with restrictions which impacted on the activities of Supporting Older People.

Supporting Older People were still involved with delivering the Pablo Kitchen's meals, cooked by Paul Welch. This project ended in July mainly due to lack of demand and Paul wanting to end the project. Our thanks go to Paul Welsh for cooking over 12,000 meals, helping vulnerable and isolated people in the Harrogate and Knaresborough area.

We currently have 234 clients with 102 volunteers. Without the wonderful support of our volunteers, Supporting Older People would not exist – our thanks go to everyone who gives up their time to help.

We have referrals from the Living Well Team, social prescribers, Home from Hospital, Occupational Therapists, CMHT, other charities, families and self-referrals. We average two to three referrals per week.

Volunteers are recruited by hearing about our work from other volunteers, publicity and recruit campaigns. Often the volunteer gets as much out of the home visiting as the client. We had this email from a volunteer:

"I just wanted to let you know how I have been getting on with Wendy, she is the loveliest lady ever, I enjoy her company very much and I get the impression she looks forward to our meetings, we have been taking advantage of the dry weather and going for a walk and having a coffee out. Getting out is great and Wendy loves walking. I always walk her back home and fill in the calendar for our next visit, thank you for introducing us".

## HOME VISITING

We recommenced our Home Visiting in May, taking precautions i.e. hand sanitizing, face masks etc. There was a backlog of referrals and lots of telephone volunteers chose to visit their client in person.

We have a comprehensive recruitment process. The new volunteer meets with the Befriending Manager for a "get to know you" meeting. We ask for two references and a DBS check. Personalities, location, interests and hobbies are all taken into consideration to ensure a good match between the volunteer and client.

Taking an average of one hour a week over a yearly period our befrienders give 7800 volunteering hours per year. Using the Living Wage this would amount to £74,100 per year.

## **TEA & TALK**

After much discussion we decided to bite the bullet and arrange our first get together after the lockdown. The Hotel du Vin very kindly hosted the afternoon tea. We did expect around 8 or so members attending but were astonished to welcome 42 to the event. Although some restrictions were in place i.e. staying in your seat and wearing masks whilst moving about everyone had a wonderful time and were delighted to be out and about again.

After this successful event we went back to our monthly visits to the Crown Hotel for Tea and Talk.



## **SINGING GROUP**

After much discussion and taking into consideration the Covid restrictions regarding singing groups we decided to pause the group for the foreseeable future.

## **DINING OUT CLUB**

The Dining Out Club was relaunched in August with a lovely meal at Buon Gusto attended by 20 of our members. We celebrated Christmas at the Inn at Cheltenham and a memorable Valentine's Day at Buon Gusto with a free drink on arrival and wonderful decorations.





## **OUTINGS**

Our first outing after restrictions had been lifted was a trip on the Endeavour Barge on the Skipton Canal. It was lovely to be all together again enjoying the company, fresh air and good food. We also had a trip to Breezy Knees, Harewood Arms and a Christmas Shopping trip. February 2022 was a trip to Tropical World. We have taken up to 20 people on these outings.



## **MOVEMENT & MUSIC**

The group restarted their activity at the end of August. Everyone was pleased to get back to the weekly exercise and a catch up over refreshments. Up to 20 people attend this activity every week.

## **CHRISTMAS**

All of our group activities celebrated Christmas with entertainment from Kitty le Mare at the Tea and Talk Christmas party and a wonderful Christmas lunch at the Inn at Cheltenham Parade with free wine too!

We held our main Christmas Party at the Crown Hotel thanks to the Round Table who sponsored and helped at the event. 50 people enjoyed entertainment from the Harrogate Ukes, a lovely Christmas lunch and a visit from Father Christmas.

## Case Study

\*Names have been changed to protect the client's privacy.

### The Importance of Friendship

The monthly Tea & Talk event at the Crown Hotel sees around 45 to 50 members of Supporting Older People getting together to enjoy either a guest speaker, entertainer or partaking in a game of bingo or a quiz.

Everyone enjoys the "Talk" element of the afternoon but what makes the event so special is the chance to chat with other members of SOP over an afternoon tea. This gives everyone the chance to make new friends.

A wonderful example of this is two ladies who had never met before joining the Tea and Talk and found themselves sitting next to each other. Pat and Eve found they had a lot in common, similar family situations, a love of shopping and both enjoy baking. They arranged to meet in town for lunch and now this is a regular event.

Two of our gentleman, again attending Tea & Talk now meet up and have both decided to join a bowls club in Harrogate.

Our outings always involve a journey and during this time it gives everyone a chance to get to know each other. Everyone always says it is lovely to have a day out with like minded people.

It is often difficult to make new friends especially when you may have lost friends and find yourself going from an active social life to wondering what to do. Our events at Supporting Older People encourage people to chat and find out about each other. When connections are made this leads to solid friendships which offer support and, more importantly, something to look forward to.

## **Risk Management**

Supporting Older People maintains a risk register and the Board of Trustees ensures that all major risks to which the charity is exposed are reviewed on a regular basis and also that systems and procedures are in place to manage such risks. We also work with our insurance broker, Marshall Wooldridge to ensure that risks are minimised.

The main controls used by the charity include agendas and minutes of all meetings held; reporting through the organisational structure; policies and procedures formally adopted by the board and activity specific or individual risk assessments which are developed and maintained by the staff team and approved by the Director.

## **Public Benefit**

We have referred to the Charity Commission's general guidance on public benefit and are confident that Supporting Older People meets their requirements. Our Home Visiting Scheme is free to all and, whilst we ask for a contribution towards the cost of our activities, these are subsidised by us. Equal access to our services is important to us and people join us regardless of gender, ethnicity, faith, sexual orientation or any other factor. We are now doing specific work with veterans, both male and female.

Provision of our 1:1 befriending and group activities for older people who live alone aims to avoid social isolation, encourages friendships and helps to prevent mental and physical ill health. A significant number of our older volunteers also live alone. Volunteering their time to visit others alleviates their loneliness and gives their lives a focus, without which they may become in need of interventions.

## Future Plans and Possibilities

Our strategic aims up to 2025 are:

- To diversify our funding base and secure longer-term funding,
- To build, expand and support more flexible, diverse and high-quality volunteers,
- To strengthen partnership working with a range of organisations and agencies to extend our reach and access to other support services for older people,
- To evidence the impact and raise the profile of our work,
- To review, update and strengthen SOP's policies, processes, procedures and governance.

During the next twelve months we will update our strategic plan to ensure that it reflects the increased demand for our services post-pandemic and the need to meet the challenges of a more competitive funding environment. By diversifying our funding and applying for larger multi-year grants we will aim to have a funding cushion for the potential loss of £11,000 a year when the NYCC Wellbeing and Prevention contracts end during 2022-23.

We aim to develop new partnerships and have begun discussions with Nidderdale Plus about the possibility of developing a joint befriending service and group activities to reach older people who are lonely as a result of rural isolation

We will plan a campaign to recruit more volunteers in Knaresborough to reflect the increased number of referrals we are getting from that part of the district. We also wish to contact our existing volunteers to ensure that they are receiving the support they need and aim to hold a thank you event during the year for them, as well as restarting regular information and training events.

In response to requests from members, we will research the feasibility of starting a cinema club for people who do not wish to go to the cinema alone and look for opportunities to link with and signpost to other community activities in Harrogate and other parts of the district.

We have received funding from the Two Ridings' Community Foundation to update our IT systems and aim to do this during 2023. This will improve our efficiency and ensure we are GDPR compliant.

We will continue to ensure full cost recovery for all our activities and continue to run our own fundraising events to supplement our grant income. As part of our strategic plan we aim to attract in-kind support, together with funding and skills from the local business community via networking.

Finally, we are celebrating our 40th anniversary in style in 2022-23!



## Administrative Information

### Legal and Administrative Information:

Charity Name:	Supporting Older People CIO
Charity Registration Number	1155682
Principal Address	Community House 46 – 50 East Parade Harrogate HG1 5RR

### Trustees:

Supporting Older People CIO is a charitable incorporated organisation registered with the Charity Commission on February 6th 2014 and governed by its constitution of December 3rd 2013. The control and governance of the charity are the responsibility of its trustees.

Julie Barlow	Chair
Teresa Stearn	Vice Chair
James Houseman	Treasurer
Jackie Ashton	
Trevor Chapman	
Martin Taylor	
Jenny Huddleston	

The trustees are responsible for keeping proper accounting records, which disclose with reasonable accuracy at any time the financial position of the charity, and for the preparation of accounts for each financial year, which give a true and fair view of the state of affairs of the association and of its income and expenditure for that period. 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 and for reviewing the risks to which the charity is exposed and the mitigation of these.

**Director** Kate Rogata

**Examiner** Claire E Millington

### Bankers

Lloyds Bank PLC  
8 -11 Cambridge Crescent  
Harrogate  
HG1 1PQ

# Financial Review

## Change of Treasurer

Having been a volunteer at the charity, I joined the board of trustee 12 months ago following Ian Shay's stepping down. Ian provided a fantastic support to SOP, and his financial experience helped steer that charity through some challenging times. I owe Ian a personal thank you for his guidance with my handover.

In terms of my experience, I am a chartered accountant with 10 years post qualification experience. I have worked in a number of roles, both in industry and with large accounting firms. I've been looking to 'give something back' for a number of years, and when the request came around for a replacement Treasurer with SOP, it seemed like the perfect opportunity. I am very much looking forward to the future and continuing to work with the fantastic team.

## Accounting basis

As a small charity (defined as one with gross income of less than £250,000), the financial statements have been prepared on a receipts and payments basis, in line with the previous year.

## Funding during the year

The year began with continued uncertainty due to the ongoing impact of the Covid-19 pandemic, and the impact of lockdowns on the charity's operations. Fortunately, during the year, lockdowns and social distancing measures were completely relaxed, meaning SOP could return to its pre-Covid operational activities, with a return to face-to-face befriending and social events.

Funding presented a challenge through the year – due to the impact of Covid, fundraising activities were decreased, leading to some volatility in cash. However, I am pleased to say that thanks to the hard work of the team, several large additional grants and donations were secured.

Of the £72,642 of donations and grants received during the year, £25,000 were restricted grants provided by Harrogate & District Community Action (H&DCA) (as part of their Wellbeing and Prevention contract with North Yorkshire County Council) and the Two Ridings Community Foundation.

The remaining £47,642 of funding came from grants and gifts from the private sector, charitable trusts, and private individuals, and we are extremely grateful for the generosity demonstrated here; without this funding, the charity would not have been able to carry out its work during the financial year.

The main source of funding for the core activities of Supporting Older People was the Wellbeing and Prevention contract with North Yorkshire County Council. We also received a substantial grant from NYCC Stronger Communities and several grants from the Two Ridings Community Foundation.



Our activities were also funded by:

52 Lives	Albert Hunt Trust
Arnold Clark Community Fund	Asda Foundation
Blackrock UK via Benevity	Charities' Trust
Co-op Local Community Fund	George A Moore Foundation
Harlow Lodge 4404 – Mrs Hinchley's Bequest	Harrogate Bowling Club
Harrogate Round Table	Home Instead Harrogate
Liz and Terry Bramall Foundation	Meadowside School
NatWest Harrogate	Rotary Club of Harrogate Brigantes
Stonebridge Homes	Techbuyer
The Brelms Trust	The Linden Charity
The Local Fund	Vertu Volkswagen Harrogate

In addition, Supporting Older People received income from donations from numerous individuals and from charges for some group activities and our Fundraising Group, chaired by our trustee Martin Taylor, has recommenced event planning.

We are extremely grateful to all the organisations and individuals whose generosity has enabled us to carry out our work in 2021-22

### **Expenditure**

The charity operates on a very lean basis, with a small team of 3 part-time members of staff working out of a single office, rented from H&DCA at a subsidised rate. As a result, overheads are kept to a minimum, with over 75% of the costs relating to staff costs.

Despite a continued focus on minimising expenditure throughout the year, overheads have increased compared to the previous year.

Befriending activities organised by the charity operate thanks to the fantastic unpaid contributions that our many volunteers; without them, SOP would not be what it is today.

### **Financial position and future**

During the year, income exceeded expenditure by £2,216, meaning as at 31 March 2022, cash at bank was at £36,456. This represents enough to fund operational costs for roughly six months.

I am pleased to say that 2022/23 is off to a great start, with cash reserves increasing to considerably more than 2021/22's closing balance, thanks to fundraising activities and donations received.

# The Figures

## STATEMENT OF FINANCIAL ACTIVITIES

### INCOME

Donations and grants
Income from charitable activities
Investment income
<b>Total income</b>

### EXPENDITURE

Charitable activities
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### NET INCOME/(EXPENDITURE) FOR THE YEAR

FUND BALANCES AT 31st MARCH 2021

FUND BALANCES AT 31st MARCH 2022

## YEAR ENDED 31 MARCH 2022

Unrestricted	Restricted	Total
£	£	£
45,752	29,600	75,352
1,107	-	1,107
-	-	-
46,858	29,600	76,458
-	-	-
46,642	27,600	74,242
<b>216</b>	<b>2,000</b>	<b>2,216</b>
34,240	-	34,240
<b>34,456</b>	<b>2,000</b>	<b>36,456</b>

## BALANCE SHEET

### NET ASSETS

Cash, bank and building society deposits
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### TOTAL NET ASSETS

### FUNDS

Unrestricted
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### TOTAL FUNDS


## YEAR ENDED 31 MARCH 2022

Unrestricted	Restricted	Total
£	£	£
34,456	2,000	36,456
<b>34,456</b>	<b>2,000</b>	<b>36,456</b>
34,456	2,000	36,456
<b>34,456</b>	<b>2,000</b>	<b>36,456</b>

## Related party transactions

During the year, the charity incurred £732 (2021: £213) of costs from XI Comms Limited, a company partially owned by one of the Trustees, in respect of telephony services.

James Houseman

  
James Houseman (Jan 27, 2023 17:08 GMT)

Treasurer, November 2022





# The Examiners Report



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Independent examiner's report on the  
accounts

## Section A

## Independent Examiner's Report

**Report to the trustees/  
members of**

Charity Name

Supporting Older People CIO

**On accounts for the year  
ended**

31 March 2022

**Charity no  
(if any)**

1155682

**Set out on pages**

14 to 16 of the Annual Report

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 March 2022.

**Responsibilities and basis of  
report**

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.


## Independent examiner's statement

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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

Signed:

  
[claire millington \(Jan 27, 2023 17:13 GMT\)](#)

Date:

Jan 27, 2023

Name:

Claire E Millington

Relevant professional  
qualification(s) or body (if  
any):

BA

CA (ICAS)

Address:

The Coach House

OL14 6HA

*Section B*

*Disclosure*

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**

No matters that the examiner deems are disclosable.



Community House  
46-50 East Parade  
Harrogate  
HG1 5RR

Tel: 01423 531490  
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[www.supportingolderpeople.org.uk](http://www.supportingolderpeople.org.uk)

Charity No. 1155682



[www.facebook.com/SupportingOlderPeople](https://www.facebook.com/SupportingOlderPeople)



@HarrogateSop










# Annual Report 2022 for signature

Final Audit Report

2023-01-27

Created:	2023-01-27
By:	James Houseman (james.houseman@bhp.co.uk)
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-  Agreement completed.  
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