

Supporting Older People CIO



Annual Report

For the year to 31st March 2023

Community House
46-50 East Parade
Harrogate
HG1 5RR

Tel: 01423 531490
Email: sop.harrogate@gmail.com
www.supportingolderpeople.org.uk

Charity No. 1155682

Contents

Welcome from the Chair	3
Introduction from the Director	5
SOP Activities	7
Case Study	11
Risk Management	12
Public Benefit	12
Future Plans and Possibilities	13
Administrative Information	15
Financial Review	16
Examiner's Report	20

Welcome from the Chair



The year 22/23 was a milestone for Supporting Older people as it was our 40th year, and we celebrated! I hope you were able to join us in some of the events.

This year has again been a challenge but in different ways, maintaining funding in the challenging charity sector and difficult economic environment was and continues to be key component of our work. As I mentioned in my last Chairmans report in 21/22 we needed to prepare and plan for the end of the NYCC Wellbeing and Prevention contract, which was a significant source of funding for us. The team achieved this transition and achieved it through working in effective partnerships. In 22/23 we worked in partnership with Harrogate Town Foundation, Age UK North Yorkshire and Darlington. We were awarded the North Yorkshire Council grant for Harrogate to support people to Stay Healthy Independent and Connected. This started in April 23 so we are looking forward to reporting on that success in the next Annual Report. Continuing on the partnerships theme we also worked with Nidderdale Plus on pilot projects to help alleviate loneliness in rural areas, a area of work close to our hearts.

Our fundraising group has achieved great things this year under the stewardship of our trustee Martin Taylor, with a major fundraising event with the Ball for our 40th Anniversary. My thanks go to the fundraising team for a fantastic achievement.

Our thanks go to all our funders and colleagues at NYCC for their continued support to help us keep SOP thriving for the benefit of our beneficiaries. The SOP team go above and beyond to provide a comprehensive range of activities, as well as our befriending service. Demand continues to grow for all of our activities- meeting that demand is down to the hard work and dedication of the SOP team and of course our wonderful volunteers.

I, on behalf of the Trustees would like to massive thank you to all our volunteers without whom we simply would not be able to do what we do. Lastly a huge thank you from both myself personally and on behalf of the Trustees to the exceptional team we have in Kate, Julia, and Lorna- who through difficult and changing times do keep the show on the road with enthusiasm and expertise.

Julie Barlow



Chairman

Introduction from the Director



Reading this year's annual report, at the end of our 40th anniversary year, I am incredibly proud of everything our small charity has achieved in a difficult economic climate when demand for our services is rising. Financially, we had a strong year culminating in being awarded the only North Yorkshire Council grant for Harrogate to support people to Stay Healthy, Independent and Connected commencing on 1st April 2023. We have formed a partnership with Harrogate Town Community Foundation and Age UK North Yorkshire and Darlington and are looking forward to reporting on the first year of activity in our 2023-24 report. I would like to take this opportunity to thank North Yorkshire Council for their support and faith in us.

Partnerships have been so important to us in 2022-23 and we were thrilled to work with Nidderdale Plus to pilot an outings programme in the dale to alleviate rural isolation. As I write this introduction, we are at the halfway stage and you can read about our progress in this report.

You can see the case studies and reports on our befriending and activities, which this year have gone from strength to strength, including our brand-new Cinema Club and Friendship Group. Demand for our activities and befriending service continues to grow and it is vital that we are able to diversify our funding sources in light of increased competition for grants. To this end, our small fundraising team pulled out all the stops organising our "Fabulous at 40!" ball in July. It was the first time we had attempted such a large event, so we were delighted that it was a huge success, attended by 100 people and raising over £7,300, which for a small charity like SOP was a great result.





We were able to use a grant from the Two Ridings Foundation to buy new laptops for all our team, helping us to work more efficiently and effectively and we are very grateful.

We are continuing to raise our profile via social and local media, memberships of local networking groups and Chamber of Commerce. These have resulted in more businesses supporting us via fundraising initiatives and by giving staff time as part of their Corporate Social Responsibility to volunteer by driving our members to events. This enables more older people to come to our events and makes an enormous difference to us.

I would like to take this opportunity to thank our chair, Julie Barlow and all our trustees for their vision, guidance and support. They make steering a small charity through sometimes challenging times much less of a burden. We would also 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 welcome Laura Crossley to the team in her role as Coordinator of the Nidderdale Outings' Project and thank my wonderful colleagues, Julia Lightfoot and Lorna Daniel, for their continued dedication, commitment and innovation which place us in a strong position to meet the challenges ahead and make Supporting Older People such a wonderful place to work.

Here's to the next 40 years!

Supporting Older People's Activities

Two new activities
launched this year:

Cinema Club

Harlow Friendship Group

We currently have 242
clients.

Easter and Christmas
gifts delivered to all our
clients homes.

We have 75 clients
who have
requested us to
contact them about
Tea & Talk, with an
average monthly
attendance of 45.

We currently have 115
volunteers. Visiting
124 clients.

Taking an average of
one hour a week over
a yearly period our
befrienders give 5980
volunteering hours per
year. Using the Living
Wage this would
amount to £62,311 per
year.

HOME VISITING

We have wonderful team of 115 volunteers visiting 124 members of Supporting Older People. Taking an average of one hour a week over a yearly period our volunteers give an impressive 5980 hours of volunteering per year. Using the Living Wage as guidance this would amount to £62,311.60.

We have referrals from the Living Well Team, Occupational Therapy, the Red Cross, Home from Hospital, NYCC, doctors, family and self-referrals.

In order to ensure a good match our Befriending Manager meets with all referrals and volunteers, this helps to get to know the person, their hobbies and interests and where they live. We ask for two references from our Befrienders and a DBS check.

Our Befriending Manager prides herself on making good matches which lead to long and fulfilling friendship between the client and the befriender.

TEA & TALK

We have approximately 55 members who attend Tea and Talk on a regular basis with another 20 or so who attend at least two sessions during the year. The event is held on the second Tuesday of month at the Crown Hotel in Harrogate.

There has been entertainment from Harrogate Ukes and Side by Side, talks by the Masons and the police and a game of Boccia organized by Later Life Hub.

We took Tea and Talk on Tour to the Cuttings, an extra care housing charity. We had delicious homemade cake and entertainment.

To celebrate the Queen's Jubilee in June we hired Follifoot Village Hall and the team at Supporting Older People produced an afternoon tea for 60 people with entertainment from a very patriotic Karen Clegg.

Unfortunately Harrogate Volkswagen were taken over and we lost their support with the transport. We will always be very grateful to Kevin Howe and his team for supporting our charity. We were delighted when Financial Force's Harrogate offices offered to help with transport. They provide between three and five cars per month. Without their invaluable help with could not manage this event.

We had a meeting with Gary Nash from 4Life Wealth Management who was very keen on becoming involved with Supporting Older People. Part of their involvement was to provide lifts to the Tea and Talk event. They often volunteer two cars per month and again we are so grateful for their help.

DINING OUT CLUB

The attendance at Dining Out Club continues to grow with around 15 to 20 people attending each event. We aim to book local, independent restaurants to help the community. Everyone says that there is a real joy in eating together and enjoying each other's company over lovely food.



OUTINGS

A lot of time and thought goes into providing a full and varied outings programme for the year. Trips this year include Bridlington, Helmsley, Masham market, Harewood, an emotional trip to Eden Camp and pot painting in Knaresborough.

We offer a trip a month. We are delighted to work with the Happy Wanderers transport service who provide the bus and a driver for the trip. Our trips are so popular we often need two buses.



MOVEMENT & MUSIC

This year saw the retirement of Carol the instructor. Carol had been with the group for many years and we wish her every happiness in her future endeavours. We were very lucky to introduce Mandy Tennant to the group. As with everything new, Mandy has put her flair and expertise into the group and everyone is enjoying the new exercise routines. The group has 20 members who attend each week. The group is run by wonderful volunteers who dedicate their time on a weekly basis – without their input the group would not run and we so appreciate them.

FRIENDSHIP GROUP

We were approached by Pat from the Harlow Friendship Group who was looking for another group to take over the running. Supporting Older People felt the group would be excellent under the SOP banner and agreed to take over. Lorna, the administrator at SOP runs the group which entails booking guest speakers or an act, taking the money and making the refreshments. We have up to 30 members who attend the group each week.



CINEMA CLUB

In March 2023 we launched our Cinema Club. Our survey showed that some clients would like to meet up to go to the cinema in a group. We now meet on the third Wednesday of the month to join the Silver Screen film showing.

EXTRA ACTIVITIES

With financial support from Harrogate Brigantes Rotary Club we arranged an Easter egg delivery to each of our members. Everyone received an egg and a bunch of daffodils to brighten their Easter. Our wonderful volunteers helped with the delivery of over 320 gifts. Full Circle Funerals raised funds for Supporting Older People to thank our volunteers with an event at Horticap in Harrogate. There was a wonderful buffet for 40 guests. We were invited to present SOP to the AFC workshops. This is an event run by Harrogate Town Community Foundation where local charities present what they do to local sixth form schools and colleges. We were lucky to be the chosen charity and the team arranged plant pot painting for a group of 15 members and presented us with a cheque for over £200.

As usual Christmas was full of fun at Supporting Older People with parties for all our activity groups and finalizing in our big Christmas party at Oakdale Golf Club. 60 members were served a two course Christmas lunch with all the trimmings, entertainment from the Duchy Belles and a visit from Santa and his elf.



Case Study

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

CASE STUDY

How volunteering can make such a difference

William came to Supporting Older People as a referral from the Living Well Team. He was feeling isolated and lonely with lack of family contact and limited time with friends. William had many interests including creative writing and working on a screen play.

He had become agoraphobic and unable to venture out. He had two small dogs who were limited to runs in the garden.

Ernest was introduced to William as his home visitor. Ernest had already been a home visitor with SOP but his client had passed away and he felt ready to start visiting someone again. On first meeting they realised they had a lot in common and chatted away easily.

William was enjoying the visits but he was still unable to leave the house. He discussed this situation with Ernest who said he would support him to get out and about.

With the support of Ernest William ventured out for a short walk with his dogs. He felt fantastic and that he had achieved something he felt would never happen.

With Ernest's solid support William now has regular trips to Lidl and Aldi where they share their love of wine, food and the middle aisle!

The power of friendship

We all feel slightly vulnerable attending new events alone even more so when you are older, perhaps just lost your partner or have not been out and about for a while. At Supporting Older People we totally understand what a big step it is to join a new group. We pride ourselves on being there to greet and make sure anyone new is introduced to other members of SOP.

What we have found is that members are making friends and getting together to enjoy social times together. Fabulous friendships have formed. Individuals are meeting up to enjoy coffee, meals out, day trips and even holidays together. A member of SOP said "I felt so lonely before joining but now I have a lovely circle of friends to chat to and enjoy their company".

Friendships are so important and having someone to call on to tell them about your day can make such a difference.

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.

We are looking forward to the second half our outings project pilot with Nidderdale Plus and hope then to support them to develop a befriending offering for older people who are lonely and isolated in the Dale.

At the time of writing, our new partnership “Together in Harrogate”, with Age UK North Yorkshire and Darlington (Age UK NY&D) and Harrogate Town Community Foundation (HTCF). This three year “Staying Healthy, Independent and Connected” project will enable us to provide more support for older and vulnerable people in Harrogate. HTCF will offer a range of activities to support physical and mental wellbeing and Age UK NY&D will recruit an Information and Advice Worker to support people to fill in forms and offer help with welfare benefits, care, housing, local services and utilities. We hope to strengthen the voluntary sector in Harrogate by inviting other groups to join “Together in Harrogate” and eventually apply for larger funding pots.

During the next twelve months we will update our strategic plan to ensure that it reflects the continued increased demand for our services 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 future. Our small fundraising team is planning a second fundraising dinner “Even More Fabulous at 41!” in July and we aim to hold three larger scale fundraising events each year and would welcome partnering with other charities and organisations to do this. As part of our strategic plan we will continue to ensure full cost recovery for all our activities and aim to attract more in-kind support, as well as funding and skills from the local business community. It is imperative that we continue to raise our profile via the local press and social media to aid local funding and sponsorship opportunities

To reflect the growing numbers of older people living in Knaresborough being referred to us, we aim to start a monthly Dining Out Club in the town in October 2023. This will give people living in the town their own local activity rather than always travelling into Harrogate. This will be combined with a volunteer befriender recruitment campaign in Knaresborough.

We aim to restart volunteer information and training events at least twice a year and explore ways to improve our communication with them. To this end, we will send out a volunteers' survey early in 2024 following a client survey in the second quarter of 2023. We have been invited to apply for the King's Award for Volunteering and will do this in 2024 to give us time to prepare.

As we expand our services and support more people, we need a more efficient way of recording what we are doing. We will therefore spend time this year exploring Customer Resource Management (CRM) systems and purchasing the best one for our needs. Two members of our trustee board will be retiring at our 2023 AGM. We therefore hope to recruit people with HR, public sector and business expertise to replace them.

NIDDERDALE PLUS PARTNERSHIP

During the first half of the year we talked with our friends at Nidderdale Plus about the rural isolation in the Dale, compounded by the difficulties in accessing public transport. We agreed that it would be fantastic if we could combine their knowledge of the Dale and the fact that they own a minibus with our Befriending and Activities' Manager's expertise in running an outings' programme. We made a joint application to the Community Transport Association and were awarded a grant which has enabled SOP to recruit Laura Crossley as Outings' Coordinator for a year and support her to develop a monthly programme of outings plus weekly trips to the shops and markets in Skipton and Ripon. So far the outings have been fully subscribed and we did a joint trip for a Christmas lunch at the Hawthorn in Yeadon, which everyone loved. In next year's report we will be able to share the outcomes of this pilot but so far the signs are that it is very successful and will continue after the pilot.



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	Co-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 Millington

Bankers

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

Financial Review

Funding during the 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 were also thrilled to receive a substantial grant from the Postcode Neighbourhood Trust and several grants from the Two Ridings Community Foundation.

In addition, Supporting Older People received income from donations from numerous individuals and organisations, together with charges for some group activities. Our Fundraising Group, chaired by our trustee Martin Taylor, organised a highly successful 40th anniversary ball and a number of our supporters raised money doing the Nidderdale Walk.

We are extremely grateful to all the organisations and individuals whose generosity has enabled us to carry out our work in 2022-23

Overview

Following the Covid-19 related challenges of the past few years, the 2022/2023 financial year started off with a great deal of optimism; SOP was back at its pre-Covid operational level, with face-to-face befriending and social events taking place, a number of large grant applications in the pipeline, and a bank balance in line with the reserves policy.

It also presented a challenge and a number of unknowns – the end of the NYCC H&RCVS Wellbeing funding, uncertainty around grant funding in future, a number of new activities, and economic uncertainties.

However, I am pleased to say that SOP has weathered these uncertainties and ends the year in an excellent financial position thanks to the hard work Kate and the Team, our volunteers, and my fellow Trustees.

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

Whilst the Charity has had an excellent year from a funding perspective (certainly the best year since I have been involved with SOP), the picture painted by the numbers is somewhat misleading. A new local authority grant of £45,000 was agreed and entered into during the year. Despite the new grant commencing from 1st April 2023, the funds were received on 30th March 2023. Furthermore, an element of amount received from NYCC included amounts that were to be distributed to the partners in the grant. Due to the accounting basis used, this must all been recognised during the current financial year. We have therefore in effect front loaded income in

respect of the coming year, plus recognised an amount which isn't actually due to the Charity in the current accounts meaning the results aren't as good as the accounts indicate.

Ignoring the above though, it has still been a very successful year from a grant perspective. The Charity received more than £63k in other grants, of which £50k was restricted funding and £13k unrestricted. These amounts include the final £11k of the NYCC H&RCVS Wellbeing funding, £13k from the Community Transport Association in partnership with Nidderdale Plus, £12.5k from the Two Ridings Community Foundation across two funds for various purposes, as well as several others.

Away from grant funding, the charity received over £29k in gifts and donations. Notable amounts include over £19k from Postcode Neighbourhood Trust, £1,500 from the Mayor of Harrogate's Fund, and many smaller donations.

In addition to those highlighted above, our activities were also funded by donations and grants from:

Allen Lane Foundation	Postcode Neighbourhood Trust
Brelms Trust	Nidderdale Plus
Financial Force (Certinia)	Rotary Club of Harrogate
Foyle Foundation	The Yorkshire Charity
Home Instead	Mayor of Harrogate's fund
Linden Charitable Trust	West Riding Fund
Masonic Charitable Trust	Woodlands Methodist Church
Groundwork UK	Yorkshire Building Society
Harrogate Round Table	The Local Lotto for the Harrogate District
Freemasons of Yorkshire West Riding through West Riding Masonic Charities Ltd.	

Finally, over £20k was generated from charitable activities. This amount includes the income generated from the various paid for activities the charity provides (Tea and Talk, Music and Movement, Friendship Group etc), as well as the very successful SOP "Fabulous at Forty" Ball that took place over summer, which raised over £10k, and amounts raised for the Nidderdale Walk.

Expenditure

The Charity continues to operate on a very lean basis. Despite this, costs have increased by circa £29k from the prior year. There are several reasons for this increase:

- the largest contributor being an increase in employment costs. These costs remain by far the largest element of expenditure, with costs increasing during the year due to a cost of living salary increase, and an additional member of staff being temporarily taken on to support with the activities taking place in Nidderdale.
- 2022-2023 was the first year in a number of years where a full calendar of activities have taken place, and accordingly costs have increase comparatively. Additionally, 2022-23 also includes the cost of the ball.
- finally, as we're all aware, the general inflationary environment has led to numerous supplier price increases.

It is worth mentioning that all befriending activities organised by the Charity operate thanks to the fantastic contributions of our many volunteers; without you, SOP would not be what it is today.

Financial position and future

Looking at the overall position, the Charity had an operating surplus of £57,694 for the full year. If we disregard the £45k of income in respect of the 2023/2024 NYCC funding, this represents an actual surplus of nearly £13k, and is a fantastic result. As at 31 March 2023, cash sat at £94,150, representing roughly 1 year of operating expenditure.

However, care must be taken to ensure that these funds remain, and I am pleased to say the 2023-2024 is off to a good start, with income and expenditure roughly in line with budget.

STATEMENT OF FINANCIAL ACTIVITIES		YEAR ENDED 31 MARCH 2023		
		Unrestricted	Restricted	Total
INCOME		£	£	£
	Donations and grants	24,025	113,434	137,459
	Income from charitable activities	20,465	-	20,465
	Investment income	229	-	229
	Total income	44,719	113,434	158,153
EXPENDITURE				
	Charitable activities	32,421	68,037	100,458
	NET INCOME/(EXPENDITURE) FOR THE YEAR	12,298	45,396	57,694
	FUND BALANCES AT 31st MARCH 2022	36,456	-	36,456
	FUND BALANCES AT 31st MARCH 2023	48,754	45,396	94,150
BALANCE SHEET		YEAR ENDED 31 MARCH 2023		
		Unrestricted	Restricted	Total
NET ASSETS		£	£	£
	Cash, bank and building society deposits	48,754	45,396	94,150
	TOTAL NET ASSETS	48,754	45,396	94,150
FUNDS				
	Unrestricted	48,754	45,396	94,150
	TOTAL FUNDS	48,754	45,396	94,150

Related party transactions

During the year, the charity incurred £732 (2022: £732) of costs from XI Comms Limited, a company partially owned by one of the Trustees, in respect of telephony services.



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 2023

**Charity no
(if any)**

1155682

Set out on pages

19 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 2023.

**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

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:



Date:

31 January 2024

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
Email: team@supportingolderpeople.org.uk
www.supportingolderpeople.org.uk

Charity No. 1155682



www.facebook.com/SupportingOlderPeople



@HarrogateSop