

Home Instead Charities UK

England & Wales · Charity number 1156700

Details

Other names	THE HOME INSTEAD SENIOR CARE BRING JOY FOUNDATION, THE HOME INSTEAD SENIOR CARE UK FOUNDATION
Status	Registered
Legal form	CIO
Registered	2014-04-15
Register	View on the Charity Commission register

Contact

Address	Walnut Tree Farm Northwich Road Lower Stretton Warrington WA4 4PG
Phone	01925730273
Email	penny.hamer@homeinstead.co.uk
Website	www.bringjoyfoundation.org

Activities

Objects: THE OBJECTS OF THE CIO ARE TO FURTHER SUCH CHARITABLE PURPOSES FOR THE BENEFIT OF THE ELDERLY (AS ARE RECOGNISED UNDER THE LAWS OF ENGLISH AS WALES) AS THE TRUSTEES SEE FIT FROM TIME TO TIME AND IN PARTICULAR BUT NOT EXCLUSIVELY THROUGH THE MAKING OF GRANTS.

Activities: To provide grants for local communities for local activities for the elderly throughout the UK

Classification

- **How:** Makes Grants To Organisations
- **What:** The Advancement Of Health Or Saving Of Lives, Economic/community Development/employment, Other Charitable Purposes
- **Who:** Elderly/old People, Other Charities Or Voluntary Bodies

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£47,278	£47,641	-	-
2024-12-31	£79,838	£54,167	-	-
2023-12-31	£68,302	£68,201	-	-
2022-12-31	£105,067	£58,114	-	-
2021-12-31	£48,882	£60,156	-	-

Trustees

Name	Role	Appointed
Clare Jefferies		2020-09-18
Diana Susan Stephenson		2020-05-29
Victoria Massey		2024-05-14

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 01	Month 01	Year 2024		Day 31	Month 12	Year 2024

Section A

Reference and administration details

Charity name

Home Instead Charities UK

Other names charity is known by

Registered charity number (if any)

1156700

Charity's principal address

Unit 2 Walnut Business Centre

Lower Stretton

Warrington

Postcode

WA4 4PG

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Martin Jones	Chair		
2	Victoria Massey		16 th June 2024 - present	
3				
4				
5				
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11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
Diana Stephenson	

Luke Norbury	Resigned 23 rd October 2024
Clare Jefferies	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Penelope Hamer

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

CONSTITUTION

How the charity is constituted
(eg. trust, association, company)

CHARITABLE INCORPORATED ORGANISATION

Trustee selection methods
(eg. appointed by, elected by)

BY APPOINTMENT

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Luke Norbury resigned from his position as Trustee on 23rd October 2024.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The objectives of the charity are to further such charitable purposes for the benefit of the elderly (as are recognised under the laws of England, Wales and Scotland) as the trustees see fit from time to time and in particular but not exclusively through making of grants.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Following the launch of our Companionship Cafes in 2022/2023 the charity is now operating 23 cafes supporting more than 500 individuals on a regular basis across the UK. Enrichment activities such as arts and crafts, singing, films, reminiscence, sporting and mobility exercises, and quizzes take place as well as regular social groups where ageing adults meet and chat over a cup of tea and cake.

Our Talk Tech café model has seen huge success getting ageing adults savvy and confident using technology devices.

In addition to the companionship/Talk Tech cafes the charity has awarded 57 grants to grass roots community groups in 2024 totalling £23,807 and benefiting 3,471 ageing adults across the UK.

Awards included:

Blaenavon Over 50s Forum, Northern Ireland: £440

To run events for the elderly coming up to Christmas for elderly people in the community and to provide them with a warm hub and refreshments during the cost-of-living crisis.

20 seniors were supported.

Embells cic community support project, Gateshead: £500

To run a free weekly community lunch service bringing those who are most valuable and isolated together to enjoy a free 3 course hot meal and to host a friendship group each month in partnership with Age UK Gateshead with a range of activities and talks.

100 seniors were supported over a 12 month period.

String of Hearts CIC, Manchester: £500

String of Hearts is a community arts organisation which connects older adults through music, to reduce isolation and improve wellbeing in later life. Based in Sale, Greater Manchester, and support 500 people each year across Trafford and Wythenshawe who are isolated and living with long-term conditions. The group runs five core groups, a music phone calls service supporting those who are housebound, and sessions in sheltered housing & mental health settings.

Through this grant, free transport was provided to enable isolated older adults to access groups in Broomwood, Sale West and Brooklands. At the sessions, older adults will take part in singing, playing percussion, discussing their lives & memories, and writing songs with String of Hearts musicians.

MHA Communities Saltash, Cornwall: £700

MHA Communities Cornwall supports older people to live later life well, providing social opportunities to prevent isolation & loneliness. The group provides support to 161 members, via social groups, day trips, befriending, signposting, newsletters & online activities. Within Saltash, 2 memory cafés and 2 music for good sessions, partnered with the NHS. The aim of the project is to promote wellbeing in members living with Dementia, providing opportunities to feel a sense of belonging & improve self-esteem.

Statutory Declaration

Re: Confirmation of Compliance with Charity Commission Guidance on Public Benefit

We, the undersigned, being trustees of Home Instead Charities (hereinafter referred to as "the Charity"), hereby declare and confirm the following:

1. **Awareness of Public Benefit Requirement:** We acknowledge our responsibility to ensure that the activities of the Charity provide a public benefit, as per the requirements set out in the Charities Act 2011.
2. **Review of Charity Commission Guidance:** We confirm that we have had regard to the guidance issued by the Charity Commission on public benefit. This includes the following key documents:
 - "Charities and Public Benefit" (PB1)
 - "The Advancement of Education for the Public Benefit" (PB2)
 - "The Prevention or Relief of Poverty for the Public Benefit" (PB3)
 - Any other relevant guidance provided by the Charity Commission.
3. **Application of Guidance in Decision-Making:** We have duly considered this guidance in all our decision-making processes to ensure that the activities, operations, and purposes of the Charity align with the principles of providing public benefit. Specifically:
 - Our programs and initiatives are designed to serve a broad section of the public, without undue restriction.
 - We prioritize transparency and accountability in our operations to demonstrate how our activities contribute to public benefit.
 - We regularly review and assess the impact of our work to ensure it continues to meet the public benefit criteria set by the Charity Commission.

4. **Documentation and Reporting:** We maintain accurate records and documentation of our adherence to the public benefit requirement. This includes:
- Minutes of trustee meetings where public benefit considerations are discussed.
 - Annual reports detailing how our activities provide public benefit.
 - Impact assessments and evaluations demonstrating the outcomes of our work.
5. **Ongoing Commitment:** We commit to ongoing education and awareness regarding public benefit requirements among trustees and staff of the Charity. We will continue to review and implement any updates to the Charity Commission's guidance to ensure continuous compliance.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year**Successes and challenges**

2024 was the charity's 10th anniversary and saw a huge uplift in fundraising from the Home Instead network of local franchise offices with more than 50% of the charity's income coming from the Home Instead Network.

Our two main events, Carols at the Cathedral and the Home Instead Annual Golf Day continued to perform well generating £17, 242.60.

Fundraising and Operations Manager of the charity commenced her maternity leave at the end of February leaving a capacity gap within the team which meant the charity was unable to actively source or secure an increase to our external funding to run our companionship cafes.

The charity operated 23 companionship cafes regularly throughout the year benefiting more than 500 ageing adults on a regular basis.

The charity awarded 57 grants to local community groups benefiting 3,471 individuals

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trustees agreed that no more than 3 months operating costs be held in reserves. As the salary costs of the two full time employees are borne by Home Instead, this equates to approx. £25,000 to be held in reserve.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Income

1. Our largest donation to date from an individual was received in January 2024 from an individual who donated 1% of his business resale to the charity. With Gift aid this saw a total donation of £12,184
2. Home Instead Local offices raised £43,108
3. Events raised £17,242
4. Trusts and Foundations £14,035
5. Lottery £4,344.80
6. Corporate donations generated £1,105

Expenditure

7. Companionship Cafes expenditure of £7,763
8. Campaigns £3,754
9. Events Expenditure £3,368
10. Grants £23,807

Section F

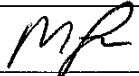
Other optional information

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	MARTIN JONES	VICTORIA MASSEY
Position (eg Secretary, Chair, etc)	Chair	Trustee
Date	23/6/25.	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Home Instead Charities UK

1156700

Receipts and payments accounts

CC16a

For the period
from

01/01/2024

To

31/12/2024

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Events	9,457	-	-	9,457	8,974
General Donations	11,131	-	-	11,131	8,126
Just Giving	10,047	-	-	10,047	960
Campaigns	-	-	-	-	504
Gift Aid	3,335	-	-	3,335	143
In Memorium and Tribute	-	-	-	-	324
Lottery	4,345	-	-	4,345	3,059
National Office	-	-	-	-	2,800
Sporting Challenge	-	-	-	-	678
Other Revenue	-	-	-	-	1,512
Local Offices	18,595	-	-	18,595	11,679
Corporate Donations	1,105	-	-	1,105	638
Conference	-	-	-	-	-
Trusts and Foundations	14,036	-	-	14,036	18,690
Carols	7,787	-	-	7,787	10,215
	-	-	-	-	-
Sub total (Gross income for AR)	79,838	-	-	79,838	68,302
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	79,838	-	-	79,838	68,302
A3 Payments					
Independent examiner fees	945	-	-	945	900
Bank fees	136	-	-	136	95
Campaigns Expenditure	3,755	-	-	3,755	2,199
Events Expenditure	3,369	-	-	3,369	4,721
General Expenses	5,536	-	-	5,536	5,900
Grant Expenditure	23,807	-	-	23,807	33,857
Insurance	851	-	-	851	883
IT Software & Consumables	6,177	-	-	6,177	18,032
Postage	641	-	-	641	221
Staff Training	275	-	-	275	-
Printing	569	-	-	569	-
Stripe Fees	95	-	-	95	-
Subscriptions	248	-	-	248	1,255
Companionship Café	7,764	-	-	7,764	-
Subsistence	-	-	-	-	138
Sub total	54,167	-	-	54,167	68,201

A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	54,167	-	-	54,167	68,201
Net of receipts/(payments)	25,671	-	-	25,671	101
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	104,023			104,023	103,922
Cash funds this year end	129,694	-	-	129,694	104,023

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank account Total cash funds (agree balances with receipts and payments account(s))	129,694 - - - 129,694 OK	- - - - - OK	- - - - - OK
B2 Other monetary assets	Details	- - - - - - -	- - - - - - -	- - - - - - -
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional) - - - - -	Current value (optional) - - - - -
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional) - - - - - -	Current value (optional) - - - - - -
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional) - - - - -	When due (optional)
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	



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**

Home Instead Charities UK

**On accounts for the year
ended**

31 December 2024

**Charity no
(if any)**

1156700

Set out on pages

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

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do 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 order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

18 July 2025

Name:

Mrs D D Lea

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

FCA, FCCA

Address:

DJH Chester Limited, Chester House, Lloyd Drive, Ellesmere Port, Cheshire CH65 9HQ

Accounts



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name

Home Instead Senior Care Charities UK

**On accounts for the year
ended**

31 DECEMBER 2023

**Charity no
(if any)**

1156700

Set out on pages

Donated to the charity, with a view to the charity

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2023.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do 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 order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

26 Sept 2024

Name:

MRS D D LEA

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

FCA, FCCA

Address:

CHESTER HOUSE, LLOYD DRIVE, ELLESMERE PORT

CHESHIRE

CH65 9HQ

Section B

Disclosure

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

Accounts



Trustees' Annual Report for the period

Period start date				Period end date			
Day	Month	Year		Day	Month	Year	
01	01	22		31	12	22	

Section A

Reference and administration details

Charity name

Home Instead Charities UK

Other names charity is known by

Registered charity number (if any) 1156700

Charity's principal address

Unit 2 Walnut Business Centre

Lower Stretton

Warrington

Postcode

WA4 4PG

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Martin Jones	Chair		
2	Luke Norbury			
3	Clare Jefferies			
4	Ruth Brown			
5	Diana Stephenson			
6				
7				
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12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
Lori Hogan	Resigned 9 th February 2022
Roger Baumgart	Resigned 30 th March 2022

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Penelope Fleur Hamer

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document
(eg. trust deed, constitution)

CONSTITUTION

How the charity is constituted
(eg. trust, association, company)

CHARITABLE INCORPORATED ORGANISATION

Trustee selection methods
(eg. appointed by, elected by)

BY APPOINTMENT

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Luke Norbury completed Trustee Roles and Responsibilities training in October 2022.

The Charity commenced in a 'Commercial Participator Agreements' with RHM Telecomms; Able Label clothing brand and JMW Solicitors.

In addition to the grant making programme the charity currently operates it was decided that the charity would commence operating a small number of companionship cafes in the local community to make a more meaningful impact on the lives of ageing adults. The process of planning for these activities began in this financial year with funding secured from outside sources including the charity's first award from an external grant making trust, The Access Foundation, to provide an element of technology to these activities. The operation of the cafes will commence in February/March 2023.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The objectives of the charity are to further such charitable purposes for the benefit of the elderly (as are recognised under the laws of England, Wales and Scotland) as the trustees see fit from time to time and in particular but not exclusively through making of grants.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

43 grants were awarded to community groups totalling £41,086.88.

10,790 ageing adults were supported through the provision of grants to local community groups.

18 Activities to reduce Social Isolation and Loneliness.

13 Activities to improve well-being.

15 Social activities.

1 communications grant to support a community of deaf ageing adults.

2 grants to provide accessible transport for community groups.

Withington Assist £1499.88

Withington Assist runs a monthly film club for over 65s living locally who miss going to the cinema but no longer feel comfortable going into town into the large venues. The activity is also good for people who would really like to socialise with others but are a bit shy/like to have a clear activity bringing people together rather than a coffee morning which can be a bit daunting. Participants found that sitting back and watching a film in a group really helped to take their mind of things that might be going on in their lives, such as health problems, bereavement, having more time to fill due to retirement or reduced mobility etc.

Volunteers help to run the session, giving out popcorn in the interval and making sure everyone feels welcomed and comfortable.

Leaf Creative CIC £1,500

Have started the UK's first ever Steel Pan Troupe, using socialisation, rhythm work and an intergenerational approach to tackle isolations and loneliness, and improve the wellbeing of participants. It is aimed at people over 50, some of whom are living with dementia, carers and families. The group is a family friendly, dementia friendly, carer friendly activity, where age groups can mix and take part in tropical themed activities.

Foundry Healthcare Lewes Patient Social Group £500

Operating 4 drop in groups per week for over 55 year olds providing activities and/or events such as art therapy, arm chair yoga, breathing techniques and music therapy to help with the mental wellbeing of the group participants and also to encourage others to join to prevent social isolation.

Crossroads Braintree and Chelmsford £690

To fund a Christmas party for people with disabilities that struggle to socialise, to prevent them becoming isolated and lonely. A two course Christmas dinner, with tea and mince pies for later with activities and entertainment including a singer.

Barrmill Jolly Beggars Burns Club £500

To fund a trip to Carlisle, stopping off at Moffat for morning coffee. This trip will benefit 57 members, all aged 70+ many of whom live in rural areas around Beith and consequently suffer from loneliness and social isolation.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

The charity was lucky enough to recruit volunteers to carry out specific tasks that benefited the day to day operation of the charity and helped to streamline process and drive income generation.

Rob Howard, chartered accountant, volunteered for two days to build a bespoke finance reporting sheet to enable the charity to segment income and expenditure more easily to facilitate the reporting of results to Trustees. This saved the charity £1,000.

Steven Gaskell, photographer, took some event photographs during the charity's golf day that generated income from sales and saved the charity the costs of hiring a photographer for the day. In total the charity benefited by £380.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

- Q3 of FY 22 saw the charity achieve its best quarter performance ever;
- Best performing Year on Year results;
- Each quarter in 2022 performed better than the previous year;
- Increased portfolio of activities;
- First ever Trusts and Foundations income; Access Foundation £43,750
- Planning the delivery of own services in 2023 with the launch of Companionship / Tech cafes;
- Carols at Manchester Cathedral was a huge success with £11,000 being generated for the charity;
- London Landmarks half marathon was the charity's most successful fundraising event generating more than £20,000.

Section E

Financial review

Brief statement of the charity's policy on reserves

The charity is to hold no more than 3 months operating costs in reserves with the exception of income that is ring fenced for direct service provision i.e. Companionship Cafes and the Access Foundation income.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

In April 2022 19 people participated in the London Landmark half marathon and generated more that £20,000 in fundraising for the charity. This is the charity's most successful fundraising activity.

The Queens Jubilee saw income of £7,000 generated from a number of street parties held by Home Instead Local Offices.

The charity secured its first income from Trusts and Foundations to run a number of companionship cafes in the local community with the aim of connecting older adults to technology to enrich their lives and help with day-to-day tasks such as online shopping, accessing online NHS health services and keeping in touch with family and friends. In total £43,650 was received from The Access Foundation.

Section F

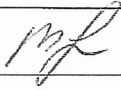
Other optional information

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Martin Jones MBE	
Position (eg Secretary, Chair, etc)	Chair	
Date	6 th March 2023	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Home Instead Charities UK

1156700

Receipts and payments accounts

CC16a

For the period
from

01/01/2022

To

31/12/2022

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Events	64	-	-	64	16,885
General Donations	75	-	-	75	15,758
Just Giving	317	-	-	317	11,016
Other revenue	-	-	-	-	5,223
Gift Aid	2,072	-	-	2,072	-
National Office	3,005	-	-	3,005	-
Sporting Challenge	1,056	-	-	1,056	-
Local Offices	36,588	-	-	36,588	-
Golf Day	5,537	-	-	5,537	-
Corporate Donations	1,363	-	-	1,363	-
Bring Joy Bake	2,548	-	-	2,548	-
Trusts and Foundations	44,750	-	-	44,750	-
Carols	7,693	-	-	7,693	-
	-	-	-	-	-
Sub total (Gross income for AR)	105,067	-	-	105,067	48,882
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	105,067	-	-	105,067	48,882
A3 Payments					
Direct Expenses	-	-	-	-	179
Advertising	-	-	-	-	(250)
Audit and Accountancy fees	1,141	-	-	1,141	1,049
Bank fees	60	-	-	60	-
Campaigns Expenditure	-	-	-	-	144
Events Expenditure	6,106	-	-	6,106	6,327
General Expenses	5,001	-	-	5,001	3,880
Grant Expenditure	41,087	-	-	41,087	44,801
Insurance	-	-	-	-	673
IT Software & Consumables	3,804	-	-	3,804	2,806
Staff Training	199	-	-	199	-
Subscriptions	717	-	-	717	548
	-	-	-	-	-
Sub total	58,114	-	-	58,114	60,156
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	58,114	-	-	58,114	60,156
Net of receipts/(payments)	46,953	-	-	46,953	11,274
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	56,969	-	-	56,969	68,243
Cash funds this year end	103,922	-	-	103,922	56,969

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds	Restricted funds	Endowment funds
------------	---------	-----------------------	---------------------	--------------------

B1 Cash funds

	to nearest £	to nearest £	to nearest £
Bank account	103,922		-
	-	-	-
	-	-	-
Total cash funds	103,922	-	-

(agree balances with receipts and payments account(s))

OK

OK

OK

B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	
		-	
		-	
		-	
		-	

Signed by one or two trustees on behalf of all the trustees

Signature

Print Name

Date of approval



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name

Home Instead Senior Care Charities UK

On accounts for the year
ended

31 DECEMBER 2022

Charity no
(if any)

1156700

Set out on pages

(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 31/12/2022.

Responsibilities and
basis of report

As the charity trustees of the Trust, 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 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do 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 order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

22 March 2023

Name:

MRS D D LEA

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

FCA, FCCA

Address:

CHESTER HOUSE, LLOYD DRIVE, ELLESMERE PORT

CHESHIRE

CH65 9HQ

Section B

Disclosure

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

Accounts



Trustees' Annual Report for the period

Period start date				Period end date			
From	Day	Month	Year	To	Day	Month	Year
	01	01	21		31	12	21

Section A Reference and administration details

Charity name

HOME INSTEAD CHARITIES UK

Other names charity is known by

Registered charity number (if any) 1156700

Charity's principal address

Unit 2 Walnut Business Centre

Lower Stretton

Warrington

Postcode

WA4 4PG

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Martin Jones	Chair		
2	Luke Norbury			
3	Clare Jefferies			
4	Ruth Brown			
5	Diana Stephenson			
6	Lori Hogan			
7	Roger Baumgart			
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

--

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	CONSTITUTION
How the charity is constituted (eg. trust, association, company)	CHARITABLE INCORPORATED ORGANISATION
Trustee selection methods (eg. appointed by, elected by)	BY APPOINTMENT

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

--

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The objectives of the charity are to further such charitable purposes for the benefit of the elderly (as are recognised under the laws of England, Wales and Scotland) as the trustees see fit from time to time and in particular but not exclusively through making of grants.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Park view project is a digital inclusion project based in North Tyneside the project aimed to close the gap between social inclusion and digital inclusion and collaborate with community partners and social care agencies to highlight the reality for many not online and how a culture of dependence can result. In total £420 was awarded.

West Kirby Rotary Club's Natterjack's project provides the opportunity for older people who have suffered social isolation and loneliness during the pandemic to sit chat and enjoy hot drink and snack in convivial company. In total £500 was awarded benefiting 500 ageing adults.

Hope house were awarded £400 to support older people at risk of loneliness or isolation. The project funded a community garden to bring people together to share skills, recognised value in each other and finding ways to share skills. A celebration day was the opportunity for over 55 to share their wealth of experience with the younger generation through gardening tips on caring and nurturing something as a team. The project supported 50 people across a social isolation and loneliness prevention project.

Deepness dementia is a small group located in Stornoway on the Isle of Lewis. The small group supports 15 people across a number of social activities and a 500 pound grant was awarded to provide food, drink and refreshments and craft activities during sessions which support people living on the island with dementia and their carers.

Leyland community network were awarded £500 to fund arts and crafts sessions, physical movement sessions and social afternoon tea groups. The funding allowed them to purchase large amount of items, equipment and products needed to run the community volunteer led groups. In total 75 ageing adults were supported.

Bam community group operate a Bromsgrove urban rural transport project known affectionately as Burt Bus. BURT is a local minibus service which enables older vulnerable people in less mobile areas of Bromsgrove to get out and about and to do daily exercise classes and befriending groups. A grant of £1000 provided support BURT to ensure that older people in Bromsgrove who been shielding in 2020 and 2021 start to get out and about and rejoin local clubs. In total 263 ageing adults were supported.

Kilcooley women centre what awarded 500 pounds to support a digital services project to assist those experiencing digital poverty or exclusion and mentored those who needed assistance navigating apps like zoom and Facebook. Webinar sessions on the following topics were provided: Cooking Clubs, therapeutic gardening, yoga, mindfulness sessions and art clubs. In total 60 seniors were supported.

Additional details of objectives and activities (Optional Information)

You **may choose** to include further **statements**, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The first 6 months of the year were difficult as the country was still in a COVID-19 lockdown situation with planned activities for the summer cancelled due to a period of full lock down issued by the Government.

COVID-19 was still impacting on the fundraising capability of the charity through as the charity's planned Christmas Carol concert in December at Manchester Cathedral was cancelled due to the surge of the new omicron variant.

Despite this, the fundraising income of the charity has grown significantly due to a planned programme of activities throughout the year and a comprehensive fundraising strategy that was introduced in January 2021.

The focus of the fundraising manager was to drive fundraising from within the Home Instead network of local offices. This coupled with the strategy and operation plan meant the charity achieved its best year in terms of income generation and grant distribution.

The most significant change in 2021 was to the name of the charity. The Trustees embarked on a journey of identifying the charities strengths, weaknesses, opportunities and threats and made the decision to re name the charity Home Instead Charities UK to reflect the global nature of the work the charity was undertaking with sister charities in US, Canada and Australia. The move would also prove influential in the charities fundraising capabilities within the Home Instead network and is credited with the significant increase in fundraising and engagement from this target audience.

Section E Financial review

Brief statement of the charity's policy on reserves

The Trustees have agreed to hold 3 months operating costs in reserves.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

MJ

Full name(s)

MARTIN JONES

Position (eg Secretary, Chair, etc)

Chair

Date

2.10.22



CHARITY COMMISSION
FOR ENGLAND AND WALES

Home Instead Charities UK

1156700

Receipts and payments accounts

CC16a

For the period
from

01/01/2021

To

31/12/2021

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Events	16,885	-	-	16,885	5,652
General Donations	15,758	-	-	15,758	2,176
Just Giving	11,016	-	-	11,016	-
Other revenue	5,223	-	-	5,223	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	48,882	-	-	48,882	7,827
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	48,882	-	-	48,882	7,827
A3 Payments					
Direct Expenses	179	-	-	179	-
Advertising	(260)	-	-	260	-
Audit and Accountancy fees	1,049	-	-	1,049	966
Campaigns Expenditure	144	-	-	144	3,150
Events Expenditure	6,327	-	-	6,327	3,741
General Expenses	3,880	-	-	3,880	128
Grant Expenditure	44,801	-	-	44,801	5,515
Insurance	673	-	-	673	-
IT Software & Consumables	2,806	-	-	2,806	302
Subscriptions	548	-	-	548	-
	-	-	-	-	-
Sub total	60,156	-	-	60,156	13,802
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	60,156	-	-	60,156	13,802
Net of receipts/(payments)	(11,274)	-	-	11,274	5,976
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	68,243	-	-	68,243	74,218
Cash funds this year end	56,969	-	-	56,969	68,243

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank account	56,969		-
		-	-	-
		-	-	-
	Total cash funds	56,969	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

HOME INSTEAD CHARITIES UK

**On accounts for the year
ended**

31 DECEMBER 2022

**Charity no
(if any)**

1156700

Set out on pages

(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 31/12/2021.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, 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 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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do 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 order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

Name:

MRS D D LEA

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

FCA, FCCA

Address:

CHESTER HOUSE, LLOYD DRIVE, ELLESMERE PORT
CHESHIRE
CH65 9HQ

Section B

Disclosure

Only complete if the examiner needs to highlight 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.