

YORK BLIND & PARTIALLY SIGHTED SOCIETY

England & Wales · Charity number 1159188

Details

Other names	MYSIGHT YORK, YBPSS
Status	Registered
Legal form	CIO
Registered	2014-11-13
Register	View on the Charity Commission register

Contact

Address	My Sight York Ground Floor 84-86 Walmgate York YO1 9TL
Phone	01904636269
Email	hello@mysightyork.org
Website	www.mysightyork.org

Activities

Objects: TO RELIEVE THE CHARITABLE NEEDS OF PEOPLE WHO ARE BLIND, PARTIALLY SIGHTED OR VISUALLY IMPAIRED WHO ARE PRIMARILY RESIDENT WITHIN THE CITY OF YORK BY THE PROVISION OF SERVICES, ADVICE AND SUPPORT AS THE TRUSTEES SHALL DETERMINE.

Activities: The aim of York Blind & Partially Sighted Society (MySight York) is to advocate and provide services to enable people who are blind or partially sighted achieve independence and live well with sight loss. We provide an Equipment and Information Centre, a Befriending Service, an Eye Clinic service, activities, outreach to anyone struggling with sight loss in the York area.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body, Other Charitable Activities
- **What:** General Charitable Purposes, Disability
- **Who:** Children/young People, Elderly/old People, People With Disabilities, The General Public/mankind

Geography

- City Of York
- East Riding Of Yorkshire
- North Yorkshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£463,521	£408,645	-	-
2024-03-31	£357,251	£357,546	-	-
2023-03-31	£285,314	£385,083	-	-
2022-03-31	£287,703	£326,247	-	-
2021-03-31	£561,412	£371,837	£291,767	14

Trustees

Name	Role	Appointed
Andrea Glover Mrs	Chair	2023-08-16
Annette Gamston		2019-10-22
Caroline Clifford		2023-07-18
Dr Bethan O'Leary		2025-02-26
Iain Mitchell		2023-12-06
Lisa Willcox		2024-05-22
Major David Michael Crouch		2023-05-23

Linked charities

- YORK BLIND AND PARTIALLY SIGHTED SOCIETY (1159188-1)

YORK BLIND & PARTIALLY SIGHTED SOCIETY

England & Wales - Charity number 1159188

Accounts

Registered Charity Number: 1159188

York Blind & Partially Sighted Society CIO

Operating as MySight York

Independently Examined

Trustees' Report and Financial Statements

For the Year Ended 31 March 2025

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION

Charity Name

York Blind & Partially Sighted Society

Charity Number

1159188

(Linked Charity 508914 York Blind and Partially Sighted Society)

Trustees

The following Trustees have held office since 1 April 2024: -

John Sole	Chair
Annette Gamston	
Eleanor Tew	Resigned 14 November 2024
Caroline Clifford	
Major David Michael Crouch	
Andrea Glover	
Iain Mitchell	
Julie Richardson	Resigned 3 October 2024
Lisa Wilcox	
Martin Fawcett	Resigned 3 October 2024
Nicola Walker	Resigned 22 May 2024
Dr Bethan O'Leary	Appointed 26 February 2025

Chief Executive

Scott Jobson

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION (Cont.)

Principal Address and Address for General Enquiries

Ground Floor
84-86 Walmgate,
York
YO1 9TL
Tel: 01904 636269
www.MySightYork.org

Independent Examiner

Jessica Lawrence FCA
Azets Audit Services Limited
12 King Street
Leeds
LS1 2HL

Bankers

Unity Bank plc
9 Brindley Place
Birmingham
B1 2HB

Natwest
250 Bishopsgate
London
EC2M 4AA

Virgin Money
Jubilee House
Newcastle-upon-Tyne
NE3 4PL

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

Chairman's Report

Dear Members, Partners, and Supporters,

This past year has been one of consolidation planning and preparing for the future with the golden thread of sustainability to ensure MySight York is here to support people with visual impairments in York now and the future.

The beginning of the year raised the opportunity to tender for York City Council Sensory contract that supports people with a Visual Impairments and or a Hearing Impairment. Although this was considered in the context that MySight delivers complementary Visual Impairment services at the time of need and free to recipients.

The contract would not have been financially viable to tender for and highlighted the restriction on MySight constitution and its enactment.

All involved with the decommissioning of the old premises and finding and setting up the new premises have gone beyond normal human effort. During this time setting up the new service delivery point at The Community Stadium (as a pilot) and managing working from home and delivering services during the extended transition period that was thwart with legal processes.

Although the account balance at the end of the year is positive and restricted funding has been secured for 2025 -2026 along with a reduction in operation costs, the Trustees are mindful that we operate in a very volatile world where both RNIB and Guide Dogs have reduced staffing to balance their books to match income. We cannot be complacent.

To this end a new strategy has been developed to take MySight York to 2028 and beyond clearly stating Our Ambitions to:

- **Empower and equip local people with sight loss to make confident choices about their lives.**
- **Amplify the voices** of blind and partially sighted people, ensuring their lived experiences shape services and policies.
- **Champion inclusivity and accessibility** to remove barriers and create a sight-inclusive society.
- Embed the **Eye Care Support Pathway** into MySight York's services, ensuring better access to information, emotional support, and practical resources at all stages of a person's sight loss journey.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

Chairman's Report (Cont.)

- **Strengthen MySight York** as a resilient and effective organisation, ensuring long-term sustainability.

Looking forward to 2025 -2026 the Trustees and staff will be working on delivering the strategy including consulting on the MySight York Constitution. Sustainable income generation and a programme of engagement on how MySight York can continue to develop and deliver what is needed, when it is needed and free at the point of delivery.

All this is only possible by your continued support and generosity as we do not receive any government or local authority funding.

Thank you for your continued support.

Sincerely,

John Sole
Chairman
MySight York

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

The Trustees have prepared these Financial Statements in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) as detailed in the accounting policies.

Reference & Administrative Details

The Charity information on pages 1 and 2 forms part of this report.

Constitution

York Blind & Partially Sighted Society (the “Charity”) was registered as a CIO on 13 November 2014, number 1159188, succeeding York Blind and Partially Sighted Society (number 508914) which is now a linked Charity. On 1 April 2015, the activities and assets of York Blind and Partially Sighted Society were transferred across to the new CIO which commenced activities on that date.

The Trustees have taken advantage of the Charity Commission concession to link charities which have a common Trustee board allowing preparation of one set of financial statements for both charities.

Our Objectives and Activities

In planning the activities of the organisation, the Trustees have due regard to their duty to meet the Charity Commission’s requirements about public benefit. The Trustees ensure that the objective and aims of the organisation are carried out through its activities for the public benefit and details its achievements and activities in this report.

The object of the Charity is:

- To promote the welfare of people who are blind, partially sighted or substantially and permanently disabled by defective vision.

The aims are: -

- To provide a range of services designed to meet the needs of visually impaired people including an Equipment and Information Centre and Outreach facilities.
- To promote the needs of visually impaired people to statutory and voluntary organisations.
- To maintain an up to date record of visually impaired people, whilst ensuring compliance with the GDPR and ePrivacy regulations.
- Any other activities deemed to be desirable to further the welfare of visually impaired people.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

The Society's Mission is to "advocate, develop and provide services and facilities which enable people who are blind or partially sighted achieve independence with dignity, in all aspects of life and sectors of Society".

Our services are available to any visually impaired person in York and surrounding areas, plus his/her supporters and professional staff. Free membership of MySight York is available automatically to anyone registered blind/severely sight impaired or partially sighted/sight impaired, and to any visually impaired person in need of services.

It should be noted that services are provided free of charge generally. As our member/user base increases, there is an added burden around cost, which we need to fund.

We receive no Government funding and we are enormously reliant on our own fundraising activities, in a market which is becoming ever more competitive to secure funding. Legacies and donations are vitally important to ensure continued sustainability of MySight York and as we have seen over the past 3 years, when these are not as frequent or substantial we can face difficulties. It will vitally important that we can continue to raise our profile to meet these objectives.

A continued focus of both staff and Trustees will be on how we continue to provide the services in an efficient manner; how we can control our costs and optimise our income streams and where best to do this from.

Chief Executive's Introduction – Scott Jobson

It is with pride and gratitude that I present this year's Annual Report, marking a period of meaningful progress, courageous decisions, and renewed purpose for MySight York.

In 2024 - 2025, we strengthened our foundations, expanded our reach, and took bold steps to ensure that blind and partially sighted people across York continue to receive high-quality, compassionate, and practical support - free at the point of need.

I'd like to echo our Chair, John Sole, in acknowledging the year as one of strategic consolidation, thoughtful reflection, and forward planning. Our shared vision remains clear: to be a sustainable, responsive, and inclusive organisation that delivers for our community not just today, but for the long term.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

One of the key decisions this year was our choice not to tender for the City of York Council's dual sensory contract. While a difficult call, it led to important internal reflection, particularly around the limits of our current constitution. As a result, we have launched a wide-ranging consultation with our members and stakeholders, aimed at modernising our governance and increasing our agility and resilience for the future.

We also relocated our city centre base to Walmgate, a more accessible and flexible premises that supports a better service experience for all. This major move was handled with professionalism, creativity, and deep care, thank you to our staff, volunteers and supporters who made it possible.

Alongside our move, we launched one of our most exciting new services: the Community Stadium Sight Support Service. Based at York Community Stadium Eye Clinic, this initiative represents a major step forward in extending our reach. It now forms a core part of our new "triangle of support," together with York Hospital and our Walmgate office.

The stadium pilot enables us to explore how to meet people at a critical moment in their sight loss journey, when they most need emotional and practical support. It gives us valuable insights into when and where people prefer to engage with us. These lessons are now shaping our future approach, ensuring we meet people where they need us most, in ways that are accessible, timely, and sustainable.

Throughout the year, demand for our services has been high and we have responded with energy, compassion, and professionalism. Our Equipment and Information Centre remains a leading hub of personalised advice and hands-on technology support. Our befriending service continues to offer vital social connection for those who need it most. Our wide range of groups and activities brings people together, offering peer support, learning opportunities, creative exploration, and a strong sense of community. And through awareness training, we are helping York become a more inclusive and sight-loss-aware city.

We also continued to deliver our Community Connect Project, funded by the National Lottery. This initiative has enabled powerful collaborations and creative activities that are helping to reimagine York as a truly Sight Loss Friendly City.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

Thanks to strong financial stewardship and the generous backing of our supporters, we ended the year in surplus. Restricted funding is in place to protect key services through 2025 - 2026, but we remain acutely aware of the challenges ahead and the need for continued investment in this life-changing work.

Our new strategy for 2025 - 2028 will focus on five core ambitions:

- Support people with sight loss to live independently and with confidence, by providing timely, personalised advice, tools, and emotional support.
- Ensure the voices of blind and partially sighted people are heard and valued, shaping not only our services but also local policy and decision-making.
- Promote greater accessibility and inclusion across York, working with partners to remove barriers and raise awareness through training and advocacy.
- Embed sight loss support throughout every stage of the eye care journey, by fully aligning with the Eye Care Support Pathway and joining up health, social care, and community services.
- Secure a strong, sustainable future for MySight York, with resilient finances, empowered staff and volunteers, and a clear vision for growth and innovation.

To everyone who makes this work possible: our staff, volunteers, members, funders and partners - thank you. I would also like to extend special thanks to our Chair and Trustees, whose leadership, expertise and vision have helped shape a clear path forward...one grounded in community, inclusion, and resilience.

To those considering working with or supporting us: we invite you to join us. We are proud of what we've achieved, and even more excited for what comes next.

Together, we are building a more inclusive York and ensuring that no one faces sight loss alone.

Financial Review

The Society sets an annual budget that is approved by the Trustees prior to the start of the financial year. Our full year income of £463,521 exceeded our expenditure of £408,645 in this financial year. This produced a final result delivering a £54,876 surplus. In comparison, the 2023/24 financial year had full year income of £357,251 which was exceeded by expenditure of £357,546. This produced a final result of a £295 deficit.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

Financial Review Cont.

Our recent levels of income can be further analysed as follows:

	2024/25	2023/24	2022/23
Local authority / CCG funding	29,836	28,415	25,832
Donations, trusts, community fundraising	141,850	129,836	106,773
Legacies	165,690	20,344	70,043
Equipment sales	5,332	8,992	10,853
Lottery projects	119,764	138,523	46,000
TPT projects	-	29,675	24,787
Other	1,049	1,466	1,026
Total	463,521	357,251	285,314

The reduction in community fundraising and other income during 2022/23 continued to reflect the impact of Covid-19.

Legacy funding has continued to enable the Society to deliver the services its users value so highly and our thanks go to members' estates for their continued support.

Reserves policy and going concern

Free reserves of £25,096 were held at 31 March 2025 (2024: £42,676). Free reserves exclude those reserves which are restricted, designated, or which can only be realised by disposing of fixed assets held for Charity use.

The charity has opted to remove the designated Building Fund going forward.

The policy of the Executive Committee is that the Society should retain free reserves covering 3 to 4 months' operating expenditure.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

Key Management Remuneration

The pay policy of staff is based on the NJC scales with progression where appropriate. Annual increases are normally in line with the national agreement and subject to affordability at the time. New staff salaries are approved by the Executive Committee and are considered after external benchmarking of the post.

Structure, Governance and Management

We pride ourselves on being a user led organisation, admitting as members anyone who is registered blind or partially sighted living with sight loss and in need of services.

The Charity is managed by an Executive Committee (Board of Trustees) of at least 8, but no more than 15 members. In accordance with the constitution, every effort is made to ensure that many Trustees are visually impaired people. All Trustees are required to retire at the Charity's annual general meeting but can offer themselves for re-election. New Trustees are either elected at the Annual General Meeting or co-opted by the board for the period to the next Annual General Meeting. New Trustees participate in induction training and an annual programme of Trustee training is organised by the Honorary Secretary and staff.

The Executive Committee meets bi-monthly, with additional meetings as and when required. A between meeting report is issued to Trustees by the Chief Executive. Day to day management of the organisation is delegated to the Chief Executive.

Plans

YBPSS Business Plan sets the future strategy of the organisation, based on Best Practice guidance nationally and local needs. The Trustees thereby wish to:

- deliver the activities identified in our Business Plan;
- continue to provide, develop and enhance the current range of core services and activities;
- consolidate and further develop fundraising activities so we will not be reliant on legacies;
- improve training and development of staff, trustees and volunteers.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

STAFF

The Society and the excellent services it provides at the various locations can continue only because of its staff who support all our members throughout all our activities. Once again, our thanks to them all for their contribution over the past year, which has again been challenging. I therefore wish to thank personally all current staff and those who contributed during the year.

Current staff

Scott Jobson	Chief Executive
Barbara Fairs	Deputy Chief Executive
Deborah Wheller	Sight Support Service Manager
Catherine Bamford	Befriending Manager
Helen Flett	Eye Clinic Liaison Officer
Vicky Smith	Community Involvement Officer
Louise Railton	Community Engagement Officer
Lydia Wrightson	Community Connector
Bex Wood	Sight Support Adviser
Karen Dransfield	Sight Support Adviser

This report was approved by the Trustees on.....^{15/10/2025} and signed on its behalf by:

John p Sole

.....
J Sole (Chair)

Andrea Glover

.....
Andrea Glover (Vice Chair)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and UK Accounting Standards (UK Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the Charity and of the incoming resources and application of resources of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provision of the trust deed. 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.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the UK governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

I report to the Trustees on my examination of the accounts of the York Blind & Partially Sighted Society CIO for the year ended 31 March 2025.

This report is made solely to the Charity's Trustees, as a body, in accordance with Section 145 of the Charities Act 2011. My independent examination work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an Independent Examiner's Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body, for my independent examination work, for this report, or for the opinions I have formed.

Responsibilities and basis of report

As the Charity 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do 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.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO**

Independent Examiner's Statement (Cont)

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.

Jessica Lawrence

16/10/2025

.....

Jesscia Lawrence FCA
Azets Audit Services Limited
12 King Street
Leeds
LS1 2HL

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2025

	Note	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2025 Total £	2024 Total £
Income from:						
Donations, grants and legacies	2	221,229	-	176,568	397,797	295,864
Other trading activities	2	17,497	-	-	17,497	9,450
Investment income	2	799	-	-	799	657
Income from charitable activities	2	6,262	-	41,166	47,428	51,280
Total income		245,787	-	217,734	463,521	357,251
Expenditure on:						
Expenditure on raising funds	3	1,268	-	-	1,268	4,260
Expenditure on charitable activities	3	262,099	-	145,278	407,377	353,286
Total expenditure		263,367	-	145,278	408,645	357,546
Net income/(expenditure) for year		(17,580)	-	72,456	54,876	(295)
Transfers between funds		-	-	-	-	-
Net Movement in funds		(17,580)	-	72,456	54,876	(295)
Balances at 1 April 2024		42,676	-	110,483	153,159	153,454
Balances at 31 March 2025	10	25,096	-	182,939	208,035	153,159

The notes on pages 17 to 34 form part of these financial statements. All of the Charity's operations are continuing.

A fully detailed Statement of Financial Activities for the year ended 31 March 2024 is shown at note 13.

**YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO
BALANCE SHEET AS AT 31 MARCH 2025**

	Note	2025 £	2024 £
FIXED ASSETS			
IT Equipment	6	1,537	-
CURRENT ASSETS			
Stock		9,554	10,447
Debtors	7	28,480	42,058
Cash in bank and in hand		183,538	124,706
		221,572	177,211
LIABILITIES: Amounts falling due within one year			
Creditors and accruals	8	(15,074)	(24,052)
NET CURRENT ASSETS		206,498	153,159
TOTAL ASSETS LESS CURRENT LIABILITIES		208,035	153,159

REPRESENTED BY:

FUNDS

Unrestricted	9	25,096	42,676
Designated – building fund	9	-	-
Restricted	10	182,939	110,483
	11	208,035	153,159

The financial statements were approved by the Trustees on ^{15/10/2025}..... and signed on its behalf by:

John p Sole

.....
J Sole (Chair)

Andrea Glover

.....
Andrea Glover (Vice Chair)

Charity Registration No: 1159188

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

1. Accounting Policies

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

Charity Information

York Blind & Partially Sighted Society is registered as a Charitable Incorporated Organisation under the Charities Act 2011. The address for general enquiries is York Blind and Partially Sighted Society, Ground Floor, 84-86 Walmgate, York, YO1 9TL.

Accounting Convention

The financial statements have been prepared on a going concern basis in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) ("Charities SORP (FRS102)"), the Financial Reporting Standard applicable in the UK and Ireland ("FRS 102"), and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair' view. This departure has involved following Charities SORP (FRS 102) rather than Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

The financial statements are prepared in sterling which is the functional currency of the charity.

York Blind & Partially Sighted Society meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at cost or transaction value unless otherwise stated in the relevant accounting policy notes.

Going Concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the company has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

1. Accounting Policies (Cont)

Income

Income is recognised in full in the Statement of Financial Activities (“SoFA”) in the year in which it is receivable. For subscriptions and rental income this is in the year in which it is receivable and for ticket sales and meeting suppers this is in the year in which the event occurs. Deferred income represents grants received specifically for future accounting periods.

Expenditure

Expenditure is included in the SoFA on an accrual’s basis inclusive of any VAT that cannot be recovered and has been classified under headings that aggregate all costs related to the category.

All direct costs have been allocated across the functional categories of resources expended in the SoFA. Where costs cannot be directly attributed to headings, they have been apportioned on a basis consistent with the use of the resources.

The costs of generating funds relate to expenditure directly attributable to fundraising.

Costs of charitable activities include those costs incurred by the Charity in the delivery of its activities and services. Costs relating to an activity are allocated directly.

Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources.

Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

IT Equipment	25% Straight Line
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Tangible fixed assets costing more than £1,000 are capitalised.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

1. Accounting Policies (Cont.)

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is credited or charged to the statement of financial activities.

Pensions

The Charity operates a defined contribution scheme for employees. Contributions are charged as an expense to the SoFA in the period in which they fall due.

Staff costs

The costs of short-term employee benefits are recognised as a liability and an expense where settlement of obligations does not fall within the same period.

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Operating lease agreements

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lessor are charged against income on a straight-line basis over the period of the lease.

Stock

Stock is valued at the lower of cost and net realisable value.

Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

The Charity has only financial assets and liabilities of a kind that qualify as basic financial instruments in accordance with section 11 of FRS 102. Basic financial instruments are initially recognised at transaction value and are subsequently measured at their settlement value.

Cash at bank and in hand

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity held for working capital.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

1. Accounting Policies (Cont)

Debtors

Other debtors are recognised at the settlement amount due. Prepayments are valued at the amount prepaid.

Financial assets, other than those held at fair value through profit and loss, are assessed for indicators of impairment at each reporting end date.

Financial assets are impaired where there is objective evidence that, as a result of one or more events that occurred after the initial recognition of the financial asset, the estimated future cash flows have been affected. The impairment loss is recognised in the income and expenditure account.

Creditors, loans and provisions

Creditors, loans and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors, loans and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Financial liabilities

Financial liabilities are only derecognised when, and only when, the Charity's obligations are discharged, cancelled or they expire.

Amounts recognised as provisions are best estimates of the consideration required to settle the present obligation at the reporting end date, taking into account the risks and uncertainties surrounding the obligation.

Fund accounting

Unrestricted funds are funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity.

Designated funds are funds set aside by the Trustees out of unrestricted general funds for specific future purposes.

Restricted funds are funds which can be used only for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

1. Accounting Policies (Cont)

Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

The Trustees are of the opinion that there are no estimates and assumptions which have a material impact on the carrying amounts of assets and liabilities.

Legacies

Legacies are recognised as income when probate has been granted, the charity has established its entitlement to the funds and where sufficient information is available to allow it to measure its entitlement.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

2. INCOME

Year ended 31 March 2025	Unrestricted Funds	Restricted Funds	2025 Total Funds
	£	£	£
Grants			
NHS Humber and North Yorkshire Integrated Care Board:			
Equipment and Information Centre	-	12,140	12,140
Lottery Project	-	119,764	119,764
Other	-	44,664	44,664
Grant support	-	176,568	176,568
Donations	55,539	-	55,539
Legacies	165,690	-	165,690
Donations and legacies	221,229	-	221,229
Total donations, grants and legacies	221,229	176,568	397,797

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

2. INCOME (Cont.)

Year ended 31 March 2025 (Cont.)	Unrestricted Funds	Restricted Funds	2025 Total Funds
	£	£	£
Other trading activities:			
Community fundraising	14,287	-	14,287
Income from work	3,210	-	3,210
Total trading activities	17,497	-	17,497
Investment income			
Bank interest	799	-	799
Income from charitable activities:			
Hospital Eye Clinic Service			
NHS Humber and North Yorkshire Integrated Care Board			
	-	11,330	11,330
York Hospital	-	29,836	29,836
Sales of equipment and aids	5,332	-	5,332
Social and group activities	680	-	680
Sundry income	250	-	250
Total income from charitable activities	6,262	41,166	47,428
Total income	245,787	217,734	463,521

During the year donations of £1,680 (2024: £1,659) were received from Trustees of the Society.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

2. INCOME (Cont.)

Year ended 31 March 2024	Unrestricted Funds	Restricted Funds	2024 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	14,140	14,140
Lottery Project	-	138,523	138,523
Other	-	3,550	3,550
TPT Project	-	29,675	29,675
Grant support	-	185,888	185,888
Donations	89,632	-	89,632
Legacies	20,344	-	20,344
Donations and legacies	109,976	-	109,976
Total donations, grants and legacies	109,976	185,888	295,864
Other trading activities:			
Community fundraising	4,510	-	4,510
Income from work	4,940	-	4,940
Total trading activities	9,450	-	9,450
Investment income			
Bank interest	657	-	657

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED MARCH 2025

2. INCOME (Cont.)

Year ended 31 March 2024 (Cont.)	Unrestricted Funds	Restricted Funds	2024 Total Funds
	£	£	£
Income from charitable activities:			
NHS Humber and North Yorkshire Integrated Care Board	-	11,330	11,330
York Hospital	-	28,415	28,415
Sales of equipment and aids	8,992	-	8,992
Social and group activities	1,734	-	1,734
Sundry income	809	-	809
Total income from charitable activities	11,535	39,745	51,280
Total income	131,618	225,633	357,251

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

3. EXPENDITURE

Year ended 31 March 2025	Unrestricted Funds	Restricted Funds	2025 Total Funds
	£	£	£
Other	1,268	-	1,268
Total expenditure on raising funds	1,268	-	1,268
Expenditure on charitable activities			
Salaries (Note 4)	186,848	107,369	294,217
Rent, rates and service charges	10,359	-	10,359
Cost of equipment sold	9,505	-	9,505
Depreciation	172	-	172
Professional fees	10,271	-	10,271
Independent Examination	1,750	-	1,750
Lottery funding - overheads	-	34,308	34,308
Staff IT	3,196	-	3,196
Insurance	2,588	-	2,588
Consultancy	120	-	120
Maintenance	14,163	-	14,163
Stationery and photocopying	1,189	-	1,189
Sundry expenses	1,742	-	1,742
Postage	412	-	412
Bank charges	643	-	643
Newsletter	3,192	-	3,192
Phone	1,656	-	1,656
Social activities	72	-	72
Benenden Funding	-	3,300	3,300
Other costs	14,221	301	14,522
Total expenditure on charitable activities	262,099	145,278	407,377
Total expenditure	263,367	145,278	408,645

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

3. EXPENDITURE (Cont.)

Year ended 31 March 2024	Unrestricted Funds	Restricted Funds	2024 Total Funds
	£	£	£
Other	4,260	-	4,260
Total expenditure on raising funds	4,260	-	4,260
Expenditure on charitable activities			
Salaries (Note 4)	133,238	120,859	253,827
Rent, rates and service charges	16,728	-	16,728
Cost of equipment sold	5,708	-	5,708
Professional fees	7,585	-	7,585
Independent Examination	2,400	-	2,400
Lottery funding: overheads	-	48,198	48,198
Staff IT	1,700	-	1,700
Insurance	1,514	-	1,514
Consultancy	1,596	500	2,096
Maintenance	1,375	-	1,375
Stationery and photocopying	1,094	-	1,094
Sundry expenses	2,001	-	2,001
Postage	303	-	303
Bank charges	936	-	936
Newsletter	2,107	-	2,107
Phone	1,065	-	1,065
Social activities	159	-	159
TPT funding - overheads	-	198	198
Other costs	4,278	14	4,292
Total expenditure on charitable activities	183,787	169,499	353,286
Total expenditure	188,047	169,499	357,546

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

4. STAFF COSTS

	2025 £	2024 £
Total staff costs comprise:		
Gross salaries	265,182	230,312
Employer's national insurance	20,270	16,233
Pension contributions	8,765	7,283
	<u>294,217</u>	<u>253,827</u>
Average number of employees	9.4	9.6

No employee received remuneration more than £60,000 in either year.

Key management personnel comprise 1 individual (2024: 1 individual) whose aggregate remuneration and benefits totalled £53,089 (2024: £49,131).

5. TRUSTEES AND RELATED PARTY TRANSACTIONS

No Trustee or any person connected with him or her received any remuneration, expenses or benefits during the year (2024: no Trustee).

No Trustee, or anyone connected with a Trustee, has a material interest in any of the Charity's transactions.

There were no other related party transactions in either the current or prior year.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

6. TANGIBLE FIXED ASSETS

	IT Equipment £	Total £
Cost		
At 1 April 2024	-	-
Additions	1,709	1,709
At 31 March 2025	<u>1,709</u>	<u>1,709</u>
Depreciation and impairment		
At 1 April 2024	-	-
Depreciation charged in year	172	172
At 31 March 2025	<u>172</u>	<u>172</u>
Carrying amount		
At 31 March 2025	<u>1,537</u>	<u>1,537</u>
At 31 March 2024	<u>-</u>	<u>-</u>

7. DEBTORS

	2025 £	2024 £
Trade debtors	-	25
Other debtors	28,480	42,033
	<u>28,480</u>	<u>42,058</u>

8. CREDITORS

	2025 £	2024 £
Trade creditors	5,556	10,258
Other creditors	9,518	13,794
	<u>15,074</u>	<u>24,052</u>

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

9. UNRESTRICTED FUNDS

As at 31 March 2025	Balance 1 April 2024 £	Income £	Expenditure £	Transfer £	Balance 31 March 2025 £
Unrestricted funds					
General funds	42,676	245,787	(263,367)	-	25,096
Designated funds					
Building fund	-	-	-	-	-
	42,676	245,787	(263,367)	-	25,096

As at 31 March 2024	Balance 1 April 2023 £	Income £	Expenditure £	Transfer £	Balance 31 March 2024 £
Unrestricted funds					
General funds	34,105	131,618	(188,047)	65,000	42,676
Designated funds					
Building fund	65,000	-	-	(65,000)	-
	99,105	131,618	(188,047)	-	42,676

Designated Building Fund

The purpose of the Building Fund was to enable the Charity to acquire its own premises at some time in the future.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

10. RESTRICTED FUNDS

As at 31 March 2025

	Balance 1 April 2024 £	Income £	Expenditure £	Transfer £	Balance 31 March 2025 £
Eye Clinic Services	63,976	29,836	(30,145)	-	63,667
Lottery Fund	(1,347)	119,764	(111,833)	-	6,584
TPT Fund	18,334	-	-	-	18,834
Other	29,020	68,134	(3,300)	-	93,854
Total	110,483	217,734	(145,278)	-	182,939

Eye Clinic Information and Support Services

These services provide practical and emotional support to patients with a diagnosis of permanent sight loss. They operate from within the Eye Clinic Outpatients Department at York and Scarborough Hospitals and other locations commutable from York. The staff members (Eye Clinic Liaison Officers) also work with Hospital staff on issues of service delivery for blind and partially sighted patients.

Lottery Fund

The Fund was originally conceived to support our members to access activities in their own communities, however, the pandemic meant this became impossible to facilitate. The Fund kindly agreed to divert the funding to the Keeping in Touch project and online activity groups, to ensure visually impaired people were supported and had regular telephone contact, and were still able to engage socially despite the lockdowns and social distancing made necessary by Covid-19.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

10. RESTRICTED FUNDS (Cont)

TPT Fund

The Thomas Pocklington Trust Fund was conceived to provide funding for a visually impaired intern, a children's project, and an employment advisor.

As at 31 March 2024

	Balances 1 April 2023	Income	Expenditure	Transfer	Balances 31 March 2024
	£	£	£	£	£
Eye Clinic Services	64,331	28,415	(28,770)	-	63,976
Lottery Fund	(12,982)	138,523	(126,888)	-	(1,347)
Other	-	29,020	-	-	29,020
TPT Fund	3,000	29,675	(13,841)	-	18,832
Total	54,349	225,633	(169,499)	-	110,483

11. ANALYSIS OF NET ASSETS BETWEEN FUNDS

As at 31 March 2025	Restricted Funds	Designated Funds	Unrestricted Funds	2025 Total Funds
	£	£	£	£
Tangible assets	-	-	1,537	1,537
Current assets	182,939	-	38,633	221,572
Current liabilities	-	-	(15,074)	(15,074)
	182,939	-	25,096	208,035

As at 31 March 2024	Restricted Funds	Designated Funds	Unrestricted Funds	2024 Total Funds
	£	£	£	£
Current assets	110,483	-	66,728	177,211
Current liabilities	-	-	(24,052)	(24,052)
	110,483	-	42,676	153,159

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

12. LEASE COMMITMENTS

Total commitments under non-cancellable operating leases are as follows:

	Land and buildings	
	2025	2025
	£	£
Due within one year	17,500	13,538
Due between two and five years	32,083	-
Due over five years	-	-
	49,583	13,538

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED
31 MARCH 2025

13. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH
2024

	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2024 Total £
Income from:				
Donations and legacies	109,976	-	185,888	295,864
Other trading activities	9,450	-	-	9,450
Investment income	657	-	-	657
Income from charitable activities	11,535	-	39,745	51,280
Total income	131,618	-	225,633	357,251
Expenditure on:				
Expenditure on raising funds	4,260	-	-	4,260
Expenditure on charitable activities	183,787	-	169,499	353,286
Total expenditure	188,047	-	169,499	357,546
Net Movement for year	(56,429)	-	56,134	(295)
Transfers between funds	65,000	(65,000)	-	-
Balances at 1 April 2023	34,105	65,000	54,349	153,454
Balances At 31 March 2024	42,676	-	110,483	153,159

YORK BLIND & PARTIALLY SIGHTED SOCIETY

England & Wales - Charity number 1159188

Accounts

Registered Charity Number: 1159188

York Blind & Partially Sighted Society CIO

Operating as MySight York

Independently Examined

Trustees' Report and Financial Statements

For the Year Ended 31 March 2024

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION

Charity Name

York Blind & Partially Sighted Society

Charity Number

1159188

Trustees

The following Trustees have held office since 1 April 2023: -

John Sole	Chair
Martin Fawcett	
Annette Gamston	
Eleanor Tew	
Caroline Clifford	Appointed 18 July 2023
Major David Michael Crouch	Appointed 23 May 2023
Andrea Glover	Appointed 16 August 2023
Iain Mitchell	Appointed 6 December 2023
Julie Richardson	Appointed 21 February 2024
Lisa Wilcox	Appointed 22 May 2024
Barbara Capaldi	Resigned 18 October 2023
David Gawthorpe	Resigned 18 October 2023
Nicola Walker	Resigned 22 May 2024

Chief Executive

Scott Jobson

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION (Cont.)

Principal Address and Address for General Enquiries

14 Merchants Place
Merchantgate
York
YO1 9TU
Tel: 01904 636269
www.MySightYork.org

Independent Examiner

Alan Sidebottom FCA
Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9GZ

Bankers

Unity Bank plc
9 Brindley Place
Birmingham
B1 2HB

HSBC
13 Parliament Street
York
YO1 8XS

Virgin Money
Jubilee House
Newcastle-upon-Tyne
NE3 4PL

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Chairman's Report

Dear Members, Partners, and Supporters,

It is with great pleasure that I present the Chairman's Report for MySight York for the financial year ended 31 March 2024. This past year has been a testament to our resilience, adaptability, and unwavering commitment to supporting people with visual impairments in York.

Navigating Challenges and Embracing Opportunities

This financial year has been a challenging one. We started with the knowledge that we could not survive another year based on using reserves to balance the books, and closure of MySight York was a real possibility. The financial challenges have been exacerbated by the cost of living crisis, impacting our income from donations while increasing the demand for our services. Despite these obstacles, our team has worked miracles in continuing to deliver high-quality services and secure further charitable funding.

In response to these challenges, we have undertaken several strategic initiatives to ensure our sustainability and effectiveness:

1. **Financial Management and Fundraising:**

- Our successful bid to the National Lottery Fund secured £310,000 over three years, commenced on April 2024, to develop awareness training based on four key themes.
- The support from our emergency appeal over the Christmas period, along with new secured funding and a significant legacy, means that we end the year with sufficient funds to continue our vital work.
- Expenditure has been carefully managed, including negotiations with the landlord of our city centre offices to ensure value for money and reviewing services to avoid delivering statutory funded services without receiving appropriate funding.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Chairman's Report (Cont.)

2. **Service Adaptation and Enhancement:**

- We have sustained and expanded our core services, adapting to the evolving needs of our members. This includes the continuation of our “Keeping in Touch” and “Home Connections” programs, which have been crucial in maintaining contact and support for our members.
- Our Talking Space counselling service has been successfully reinstated, supported by four dedicated volunteer counsellors.

3. **Staff and Volunteer Support:**

- Recognising the importance of our team, we have reviewed and improved staff contracts, linking salaries to pay scales to ensure equity and acknowledging the vital contributions of our staff.
- Our volunteers continue to be an invaluable asset, and we have seen encouraging signs of volunteer participation, which has allowed us to continue vital services.

Achievements and Collaborations

This year, MySight York has accomplished several significant milestones:

- **New Projects and Partnerships:** We were selected by the Thomas Pocklington Trust to deliver a Yorkshire-wide project aimed at supporting visually impaired individuals into employment or training.
- **Board Development:** We have refreshed our Board of Trustees with new members, bringing in a wealth of experience and skills to strengthen our governance.
- **Community Engagement:** Our CEO, Scott Jobson, has actively connected with the York VCSE Assembly and the new Integrated Care Board, as well as being the Regional Chair of Visionary, ensuring MySight York remains integrated with key community health initiatives.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Chairman's Report (Cont.)

Integration of Consultant's Findings

We commissioned an independent consultant to support our business planning and future direction which provided invaluable insights and recommendations guiding our strategic planning:

1. **Service Review:** We have updated our service review to ensure a clear understanding of the usage, costs, and funding for each service. This has helped us align our services with the **Eye Care Support Pathway** and focus on sustainability.
2. **Premises:** Discussions with our landlord about exiting our current lease are ongoing, with plans to move to a more cost-effective city centre location that meets our service delivery needs. We are also exploring opportunities at the York Community Stadium.
3. **Fundraising:** A formal fundraising plan has been developed, focusing on trusts, foundations, legacies, and community fundraising. This includes a legacy strategy to secure long-term funding.
4. **Structure and Staffing:** We are reviewing staff roles and responsibilities to ensure effective service delivery and considering the introduction of a part-time administrative role to alleviate workload pressures.
5. **Financial Planning:** We have implemented better financial reporting and management practices to support informed decision-making and long-term planning.

Core Services and Forward Vision

Our commitment to being a user-led organisation remains unwavering. We continue to pride ourselves on providing tailored support and advocating for the needs and voices of our members. Our core services include:

1. An Equipment and Information Centre or Sight Support Hub, in the city centre, offering practical and emotional support.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Chairman's Report (Cont.)

2. A Befriending Service that fosters social engagement and community involvement.
3. An Eye Clinic Liaison Officer and Support Service (ECLO) at York Hospital Eye Clinic, assisting those newly diagnosed with sight loss.
4. A variety of peer support, leisure, and learning activities designed to enhance confidence, well-being, and independence.

Future Outlook

Looking forward with confidence, the work of MySight York will continue to meet the needs of blind and partially sighted people. The next year will be one of consolidation and planning for the medium term. We aim to expand our delivery sites, engage with additional funders, and continue our relationship with existing ones. We will be reviewing our constitution to ensure it meets MySight York's needs and allows for future development. Additionally, we will develop a new strategy encompassing Service Delivery, Income Generation, Premises, and People (Staff & Volunteers).

In conclusion, it has been a challenging but hugely successful year, and I want to extend my personal thanks to all our staff for their commitment and resourcefulness, and to all our volunteers, including my fellow Trustees. Special thanks all our generous sponsors, donors, and members who have remembered us with legacies. Your support is invaluable in enabling us to provide excellent services to our community.

Thank you for your continued support.

Sincerely,

John Sole

John Sole
Chairman
MySight York

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

The Trustees have prepared these Financial Statements in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) as detailed in the accounting policies.

Reference & Administrative Details

The Charity information on pages 1 and 2 forms part of this report.

Constitution

York Blind & Partially Sighted Society (the “Charity”) was registered as a CIO on 13 November 2014, number 1159188, succeeding York Blind and Partially Sighted Society (number 508914) which is now a linked Charity. On 1 April 2015, the activities and assets of York Blind and Partially Sighted Society were transferred across to the new CIO which commenced activities on that date.

The Trustees have taken advantage of the Charity Commission concession to link charities which have a common Trustee board allowing preparation of one set of financial statements for both charities.

Our Objectives and Activities

In planning the activities of the organisation, the Trustees have due regard to their duty to meet the Charity Commission’s requirements about public benefit. The Trustees ensure that the objective and aims of the organisation are carried out through its activities for the public benefit and details its achievements and activities in this report.

The object of the Charity is:

- To promote the welfare of people who are blind, partially sighted or substantially and permanently disabled by defective vision.

The aims are: -

- To provide a range of services designed to meet the needs of visually impaired people including an Equipment and Information Centre and Outreach facilities.
- To promote the needs of visually impaired people to statutory and voluntary organisations.
- To maintain an up to date record of visually impaired people, whilst ensuring compliance with the GDPR and ePrivacy regulations.
- Any other activities deemed to be desirable to further the welfare of visually impaired people.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

The Society's Mission is to "advocate, develop and provide services and facilities which enable people who are blind or partially sighted achieve independence with dignity, in all aspects of life and sectors of Society".

Our services are available to any visually impaired person in York and surrounding areas, plus his/her supporters and professional staff. Free membership of MySight York is available automatically to anyone registered blind/severely sight impaired or partially sighted/sight impaired, and to any visually impaired person in need of services.

We have almost 1,700 people (members) on our database, a significant increase in the past 3 years. Much of the increase comes from members outside of our core region, coming to us when their local services retrenched or closed over the past few years.

It should be noted that services are provided free of charge generally. As our member/user base increases, there is an added burden around cost, which we need to fund.

We receive no Government funding and we are enormously reliant on our own fundraising activities, in a market which is becoming ever more competitive to secure funding. Legacies and donations are vitally important to ensure continued sustainability of MySight York and as we have seen over the past 3 years, when these are not as frequent or substantial we can face difficulties. It will vitally important that we can continue to raise our profile to meet these objectives.

A continued focus of both staff and Trustees will be on how we continue to provide the services in an efficient manner; how we can control our costs and optimise our income streams and where best to do this from.

Achievements and performance

1. Achievements

2023-2024 marked another significant chapter for MySight York as we continued to expand our reach and enhance our services amidst ongoing funding challenges. Despite the persistent hurdles, we remained steadfast in our commitment to support our members, adapting our operations to meet evolving needs.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

The demand for our services continued to rise however, securing funding remained a critical concern, guiding our strategic priorities.

We established a strategic business plan to focus on developing our key priorities for a sustainable future grounded in shared values. Our strategy blends the best of traditional methods with innovative approaches to ensure comprehensive support.

We were pleased to start a new Community Connect Project funded via The National Lottery Reaching Communities Fund. This 3 year project is dedicated to transforming York into a more inclusive and accessible community.

We commenced a pilot Employment Support Project funded through Thomas Pocklington Trust, assisting visually impaired people to overcome employment barriers by providing specialist advice and support.

We were nominated, and won, the prestigious Visionary Award, in the Children and Young People category. By partnering with Explore York Libraries, Toy Like Me and York Specialist Teaching Team we developed specialist sensory sacks which contained themed stories, tactile books and items/props that bring books to life through all the senses.

Our biggest achievement however was turning a large deficit in 2022 – 2023 into a break-even position by year end 2024. This was a huge undertaking demonstrating determination, belief and commitment, from staff and supporters alike.

2. Performance

Equipment and Information Centre

Our Equipment and Information Centre remains a cornerstone of our efforts to facilitate accessibility, inclusion, and empowerment. By offering assistive technology, educational support, and communication tools, we help blind and partially sighted people overcome barriers, enhance independence, and engage more fully in life.

Between April 2023 and March 2024, we received 1,700 visits to our city centre office, reflecting the demand for our services. Our Equipment and Information Centre responded to 786 direct enquiries and sent 30 pieces of specialist

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

equipment through our Home Connections service.

- “I have seen things I haven’t been able to see anywhere else and I wanted to experience them for myself”
- “You helped me explore lighting – I found the right one. You helped me to explore clocks which talk – I found the right one that works for me. You introduced me to talking books, they have been a lifeline, so enjoyable too”
- “The Echo Dot has been a lifeline. She had always resisted Talking Books” – son of a client who had been given an Alexa Echo Dot by MySight York.
- “This is the first time I have been able to talk about my sight without it focusing on the medical, for so long”
- “I thought my reading days were over but you’ve shown so many different ways to continue”

ECLO (Eye Clinic Liaison Officer) York Hospital Trust

Our ECLO at York Hospital continues to provide essential support to people with sight loss, helping them navigate the healthcare system and access appropriate services. This year, the ECLO supported 574 individual patients and handled 1,744 overall contacts. Additionally, 205 Certificates of Vision Impairment (CVI) were issued, and 745 onward referrals were made to support organisations.

- “It all seems to have happened for me since speaking with Helen and Deb. In the last couple of months, the world has opened up for me from being in a very dark place. Thank you so much”
- “Thank you so much, we have not had anything like this before, it is so helpful to have someone to talk to. Without it we would not know what was available”
- “Thank you for taking so much time with us, you have explained everything to us really clearly”
- “Thank you, I feel better being able to talk things through with you. I feel so embarrassed by it all, but I have told you things that I won’t even tell my sister”
- “I enjoy coming to see you, if I don’t see my daughter, you are the only person I see”
- “Thank you, you have been tremendous, you have given us so much time, information, reassurance, and positivity. You have given us the chance to discuss and explain the difficulties we have which has helped us to put things into context”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Befriending Service

Our befriending service continued to provide crucial social support through face-to-face and telephone interactions. Thirty-two clients received regular face-to-face visits, with 330 home visits completed by volunteers. Additionally, 396 telephone sessions were hosted, accumulating in 832 hours of total befriending activity. Twenty-six dedicated volunteers participated in this service.

- “Having a volunteer helper can make such a difference to a person isolated at home. I know. I look forward to our weekly get-togethers”
- “My volunteer is a very good person to do this job, she is very chatty, a lot to say. Lovely lady. Thank you for the service”
- “These calls put me in touch with MySight and helped me when I first came to York. MySight has made a great difference to my life. I would not have known about it if I hadn't been receiving calls from the MySight York volunteer”
- “My visits are really good, brilliant. The volunteer has made a lot of difference. She reads books to me, I get to read books that I wouldn't have done and she makes them very interesting”

Groups and Activities

Our groups and activities play a vital role in fostering an inclusive community and providing peer support. Over the year, we hosted 308 group sessions with a total of 1,539 attendances. These sessions, which included telephone and hybrid groups, reached 41 individuals, with a total of 17,051 minutes of engagement delivered.

- “I really needed that today, we all had such a giggle and played dominoes”
- “I attended the NVDA Basic Training and found it really useful”
- “I am a really nervous person. As soon as I come through the doors a calmness comes over me”
- “The whole project from start to finish was spectacular. The sensory walks were marvelous, particularly around York Minster. We were given the opportunity to touch/feel and surroundings were described to us. The Braille bestiary was fantastic – feeling and listening to the finished product”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Communications

Our quarterly newsletter remains a key platform for keeping members informed and connected. We currently send out over 1,600 newsletters in various accessible formats, including Braille, CD, email, large print, and USB. This year, we distributed 4,192 large print newsletters, 788 by email, 220 by CD, and 176 in MP3 format. They are also available on our website and through our Alexa skill!

- “Amazing, informative newsletter. Thanks to everyone”
- “What a brilliant newsletter. Very informative with a wide range of topics. Really liked the information about the members of the committee, very helpful to have more than a name. Found Scott’s piece also really informative. Well done to team, in particular well done Barbara”
- “Thanks, I’ve started listening to talking books on Alexa and loving them. Where would we be without you, another successful idea”
- “I love my newsletter. I look forward to receiving it, it really is the best”

Transcription Service

We continued to provide a transcription service principally used by York and Scarborough NHS Trust, to ensure patients within the trust receive information in their chosen format, thus meeting the accessible health standard.

We also assisted local businesses and educational establishments to create accessible documents, such as Braille, audio or large print materials.

Community Connect Project

The Community Connect Project, funded by the National Lottery Reaching Communities Fund, began in April 2023 to make York a more “sight loss friendly city.” It aims to enhance accessibility in sports, arts, IT, and children’s activities. Key achievements include establishing a VI Tennis club, collaborating with the National Railway Museum, and holding successful events like “Let’s Get Active.” The project directly involves three staff members and several volunteers, and last year impacted 432 individuals through 19 events.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Employment Project

The employment project is part of a broader initiative to support blind and partially sighted people in Yorkshire and Humber in gaining meaningful employment. Funded by the Thomas Pocklington Trust, it is called the “Works For Me” programme. It is designed to assist visually impaired job seekers by providing tailored support such as CV advice, interview practice, support sessions, and action plans.

The programme has assisted three blind and partially sighted people into full-time employment.

Talking Space (Counselling)

Our Counselling Service is a supportive and therapeutic service providing emotional and psychological support to people affected by sight loss. Last year, Talking Space offered professional counselling to 20 people, helping to cope with the emotional impact of sight loss. This can include dealing with feelings of grief, anxiety, and depression, as well as building resilience and developing coping strategies.

- “[my relative’s] confidence has improved, the service has made such a difference to them...and me”

Fundraising and Income Generation

Fundraising continues to be essential to our ability to deliver services. We have a strong reputation with funders and are financially stable in the short term, thanks to recent successes in securing funding. However, we face significant challenges, including financial pressures and the need for sustainable premises. By implementing the recommendations outlined in our new business plan, we aim to ensure the long-term viability and effectiveness of our services, continuing to support visually impaired people across York.

We are deeply grateful for the continued support from our donors and funders, which is crucial for our operations and the positive impact we have on the lives of people with sight loss.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Looking Forward

As we move into the next year, our focus will be on leveraging our strengths and adapting to new opportunities. We aim to enhance our service delivery through multi-site access, increase community engagement, and secure sustainable funding to support our mission. Together, we can build a more inclusive and supportive environment for everyone living with sight loss.

Financial Review

The Society sets an annual budget that is approved by the Trustees prior to the start of the financial year. Our full year income of £357,251 was exceeded in this financial year by our expenditure of £357,546. This produced a final result delivering a £295 deficit.

Our income and expenditure can be summarised:

- Income has increased in the year, this largely relates to lottery projects and donations.
- Costs decreased in the year to £357k from £385k in 2022/23.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Our recent levels of income can be further analysed as follows:

	2023/24	2022/23	2021/22
Local authority / CCG funding	28,415	25,832	24,975
Donations, trusts, community fundraising	129,836	106,773	117,205
Legacies	20,344	70,043	34,196
Equipment sales	8,992	10,853	11,937
Lottery projects	138,523	46,000	98,701
TPT projects	29,675	24,787	-
Other	1,466	1,026	689
Total	357,251	285,314	287,703

The reduction in community fundraising and other income during 2022/23 continued to reflect the impact of Covid-19.

Legacy funding has continued to enable the Society to deliver the services its users value so highly and our thanks go to members' estates for their continued support.

Reserves policy and going concern

Free reserves of £43k were held at 31 March 2024. Free reserves exclude those reserves which are restricted, designated, or which can only be realised by disposing of fixed assets held for Charity use.

The charity has opted to remove the designated Building Fund going forward.

The policy of the Executive Committee is that the Society should retain free reserves covering 3 to 4 months' operating expenditure.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

Key Management Remuneration

The pay policy of staff is based on the NJC scales with progression where appropriate. Annual increases are normally in line with the national agreement and subject to affordability at the time. New staff salaries are approved by the Executive Committee and are considered after external benchmarking of the post.

Structure, Governance and Management

We pride ourselves on being a user led organisation, admitting as members anyone who is registered blind or partially sighted living with sight loss and in need of services.

The Charity is managed by an Executive Committee (Board of Trustees) of at least 8, but no more than 15 members. In accordance with the constitution, every effort is made to ensure that many Trustees are visually impaired people. All Trustees are required to retire at the Charity's annual general meeting but can offer themselves for re-election. New Trustees are either elected at the Annual General Meeting or co-opted by the board for the period to the next Annual General Meeting. New Trustees participate in induction training and an annual programme of Trustee training is organised by the Honorary Secretary and staff.

The Executive Committee meets bi-monthly, with additional meetings as and when required. A between meeting report is issued to Trustees by the Chief Executive. Day to day management of the organisation is delegated to the Chief Executive.

Plans

YBPSS Business Plan sets the future strategy of the organisation, based on Best Practice guidance nationally and local needs. The Trustees thereby wish to:

- deliver the activities identified in our Business Plan;
- continue to provide, develop and enhance the current range of core services and activities;
- consolidate and further develop fundraising activities so we will not be reliant on legacies;
- improve training and development of staff, trustees and volunteers.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

STAFF

The Society and the excellent services it provides at the various locations can continue only because of its staff who support all our members throughout all our activities. Once again, our thanks to them all for their contribution over the past year, which has again been challenging. I therefore wish to thank personally all current staff and those who contributed during the year.

Current staff

Scott Jobson	Chief Executive
Barbara Fairs	Deputy Chief Executive
Deborah Wheller	Sight Support Service Manager
Catherine Bamford	Befriending Manager
Helen Flett	Eye Clinic Liaison Officer
Vicky Smith	Community Involvement Officer
Louise Railton	Community Engagement Officer
Lydia Wrightson	Community Connector

This report was approved by the Trustees on.....^{28/08/2024}..... and signed on its behalf by:

John Sole

.....
J Sole (Chair)

Andrea Glover

.....
Andrea Glover (Vice Chair)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and UK Accounting Standards (UK Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the Charity and of the incoming resources and application of resources of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provision of the trust deed. 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.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the UK governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

I report to the Trustees on my examination of the accounts of the York Blind & Partially Sighted Society CIO for the year ended 31 March 2024.

This report is made solely to the Charity's Trustees, as a body, in accordance with Section 145 of the Charities Act 2011. My independent examination work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an Independent Examiner's Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body, for my independent examination work, for this report, or for the opinions I have formed.

Responsibilities and basis of report

As the Charity 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do 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.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO**

Independent Examiner's Statement (Cont)

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.

Alan Sidebottom

.....

Alan Sidebottom FCA

Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9GZ

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2024

	Note	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2024 Total £	2023 Total £
Income from:						
Donations, grants and legacies	2	109,976	-	185,888	295,864	226,559
Other trading activities	2	9,450	-	-	9,450	8,832
Investment income	2	657	-	-	657	227
Income from charitable activities	2	11,535	-	39,745	51,280	49,696
Total income		131,618	-	225,633	357,251	285,314
Expenditure on:						
Expenditure on raising funds	3	4,260	-	-	4,260	4,251
Expenditure on charitable activities	3	183,787	-	169,499	353,286	380,832
Total expenditure		188,047	-	169,499	357,546	385,083
Net income/(expenditure) for year		(56,429)	-	56,134	(295)	(99,769)
Transfers between funds		65,000	(65,000)	-	-	-
Net Movement in funds		8,571	(65,000)	56,134	(295)	(99,769)
Balances at 1 April 2023		34,105	65,000	54,349	153,454	253,222
Balances at 31 March 2024	10	42,676	-	110,483	153,159	153,454

The notes on pages 23 to 39 form part of these financial statements. All of the Charity's operations are continuing.

A fully detailed Statement of Financial Activities for the year ended 31 March 2023 is shown at note 12.

**YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO
BALANCE SHEET AS AT 31 MARCH 2024**

	Note	2024 £	2023 £
CURRENT ASSETS			
Stock		10,447	9,456
Debtors	6	42,058	46,360
Cash in bank and in hand		124,706	131,309
		177,211	187,125
LIABILITIES: Amounts falling due within one year			
Creditors and accruals	7	(24,052)	(33,671)
NET CURRENT ASSETS			
		153,159	153,454
TOTAL ASSETS LESS CURRENT LIABILITIES			
	10	153,159	153,454

REPRESENTED BY:

FUNDS

Unrestricted	8	42,676	34,105
Designated – building fund	8	-	65,000
Restricted	9	110,483	54,349
	10	153,159	153,454

The financial statements were approved by the Trustees on ^{28/08/2024}..... and signed on its behalf by:

John Sole

.....
J Sole (Chair)

Andrea Glover

.....
Andrea Glover (Vice Chair)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

1. Accounting Policies

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

Charity Information

York Blind & Partially Sighted Society is registered as a Charitable Incorporated Organisation under the Charities Act 2011. The address for general enquiries is York Blind and Partially Sighted Society, 14 Merchants Place, Merchantgate, York, YO1 9TU.

Accounting Convention

The financial statements have been prepared on a going concern basis in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) ("Charities SORP (FRS102)"), the Financial Reporting Standard applicable in the UK and Ireland ("FRS 102"), and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair' view. This departure has involved following Charities SORP (FRS 102) rather than Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

The financial statements are prepared in sterling which is the functional currency of the charity.

York Blind & Partially Sighted Society meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at cost or transaction value unless otherwise stated in the relevant accounting policy notes.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

1. Accounting Policies (Cont)

Going Concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the company has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

Income

Income is recognised in full in the Statement of Financial Activities ("SoFA") in the year in which it is receivable. For subscriptions and rental income this is in the year in which it is receivable and for ticket sales and meeting suppers this is in the year in which the event occurs. Deferred income represents grants received specifically for future accounting periods.

Expenditure

Expenditure is included in the SoFA on an accrual's basis inclusive of any VAT that cannot be recovered and has been classified under headings that aggregate all costs related to the category.

All direct costs have been allocated across the functional categories of resources expended in the SoFA. Where costs cannot be directly attributed to headings, they have been apportioned on a basis consistent with the use of the resources.

The costs of generating funds relate to expenditure directly attributable to fundraising.

Costs of charitable activities include those costs incurred by the Charity in the delivery of its activities and services. Costs relating to an activity are allocated directly.

Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources.

Pensions

The Charity operates a defined contribution scheme for employees. Contributions are charged as an expense to the SoFA in the period in which they fall due.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

1. Accounting Policies (Cont.)

Staff costs

The costs of short-term employee benefits are recognised as a liability and an expense where settlement of obligations does not fall within the same period.

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Operating lease agreements

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lessor are charged against income on a straight-line basis over the period of the lease.

Stock

Stock is valued at the lower of cost and net realisable value.

Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

The Charity has only financial assets and liabilities of a kind that qualify as basic financial instruments in accordance with section 11 of FRS 102. Basic financial instruments are initially recognised at transaction value and are subsequently measured at their settlement value.

Cash at bank and in hand

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity held for working capital.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

1. Accounting Policies (Cont)

Debtors

Other debtors are recognised at the settlement amount due. Prepayments are valued at the amount prepaid.

Financial assets, other than those held at fair value through profit and loss, are assessed for indicators of impairment at each reporting end date.

Financial assets are impaired where there is objective evidence that, as a result of one or more events that occurred after the initial recognition of the financial asset, the estimated future cash flows have been affected. The impairment loss is recognised in the income and expenditure account.

Creditors, loans and provisions

Creditors, loans and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors, loans and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Financial liabilities

Financial liabilities are only derecognised when, and only when, the Charity's obligations are discharged, cancelled or they expire.

Amounts recognised as provisions are best estimates of the consideration required to settle the present obligation at the reporting end date, taking into account the risks and uncertainties surrounding the obligation.

Fund accounting

Unrestricted funds are funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity.

Designated funds are funds set aside by the Trustees out of unrestricted general funds for specific future purposes.

Restricted funds are funds which can be used only for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

1. Accounting Policies (Cont)

Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

The Trustees are of the opinion that there are no estimates and assumptions which have a material impact on the carrying amounts of assets and liabilities.

Legacies

Legacies are recognised as income when probate has been granted, the charity has established its entitlement to the funds and where sufficient information is available to allow it to measure its entitlement.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

2. INCOME

Year ended 31 March 2024	Unrestricted Funds	Restricted Funds	2024 Total Funds
	£	£	£
Grants			
NHS Humber and North Yorkshire Integrated Care Board:			
Equipment and Information Centre	-	14,140	14,140
Lottery Project	-	138,523	138,523
Other	-	3,550	3,550
TPT Project	-	29,675	29,675
Grant support	-	185,888	185,888
Donations	89,632	-	89,632
Legacies	20,344	-	20,344
Donations and legacies	109,976	-	109,976
Total donations, grants and legacies	109,976	185,888	295,864

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

2. INCOME (Cont.)

Year ended 31 March 2024 (Cont.)	Unrestricted Funds	Restricted Funds	2024 Total Funds
	£	£	£
Other trading activities:			
Community fundraising	4,510	-	4,510
Income from work	4,940	-	4,940
Total trading activities	9,450	-	9,450
Investment income			
Bank interest	657	-	657
Income from charitable activities:			
Hospital Eye Clinic Service			
NHS Humber and North Yorkshire Integrated Care Board			
	-	11,330	11,330
York Hospital	-	28,415	28,415
Sales of equipment and aids	8,992	-	8,992
Social and group activities	1,734	-	1,734
Sundry income	809	-	809
Total income from charitable activities	11,535	39,745	51,280
Total income	131,618	225,633	357,251

During the year donations of £1,659 (2023: £1,644) were received from Trustees of the Society.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

2. INCOME (Cont.)

Year ended 31 March 2023	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	12,140	12,140
Lottery Project	-	25,300	25,300
Postcode Lottery	-	20,700	20,700
TPT Project	-	24,787	24,787
Grant support	-	82,927	82,927
Donations	73,589	-	73,589
Legacies	70,043	-	70,043
Donations and legacies	143,632	-	143,632
Total donations, grants and legacies	143,632	82,927	226,559
Other trading activities:			
Community fundraising	3,138	-	3,138
Income from work	5,694	-	5,694
Total trading activities	8,832	-	8,832
Investment income			
Bank interest	227	-	227

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED MARCH 2024

2. INCOME (Cont.)

Year ended 31 March 2023 (Cont.)	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Income from charitable activities:			
NHS Humber and North Yorkshire Integrated Care Board	-	11,330	11,330
York Hospital	-	25,832	25,832
Sales of equipment and aids	10,853	-	10,853
Social and group activities	882	-	882
Sundry income	799	-	799
Total income from charitable activities	12,534	37,162	49,696
Total income	165,225	120,089	285,314

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

3. EXPENDITURE

Year ended 31 March 2024	Unrestricted Funds	Restricted Funds	2024 Total Funds
	£	£	£
Other	4,260	-	4,260
Total expenditure on raising funds	4,260	-	4,260
Expenditure on charitable activities			
Salaries (Note 4)	133,238	120,589	253,827
Rent, rates and service charges	16,728	-	16,728
Cost of equipment sold	5,708	-	5,708
Professional fees	7,585	-	7,585
Independent Examination	2,400	-	2,400
Lottery funding - overheads	-	48,198	48,198
Staff IT	1,700	-	1,700
Insurance	1,514	-	1,514
Consultancy	1,596	500	2,096
Maintenance	1,375	-	1,375
Stationery and photocopying	1,094	-	1,094
Sundry expenses	2,001	-	2,001
Postage	303	-	303
Bank charges	936	-	936
Newsletter	2,107	-	2,107
Phone	1,065	-	1,065
Social activities	159	-	159
TPT funding - overheads	-	198	198
Other costs	4,278	14	4,292
Total expenditure on charitable activities	183,787	169,499	353,286
Total expenditure	188,047	169,499	357,546

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

3. EXPENDITURE (Cont.)

Year ended 31 March 2023	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Other	4,251	-	4,251
Total expenditure on raising funds	4,251	-	4,251

Expenditure on charitable activities

Salaries (Note 4)	155,274	63,092	218,366
Rent, rates and service charges	58,700	-	58,700
Cost of equipment sold	6,738	-	6,738
Professional fees	11,061	-	11,061
Independent Examination	2,200	-	2,200
Lottery funding: overheads	-	27,292	27,292
Printed material	-	403	403
Lottery funding: equipment	-	6,074	6,074
Staff It	3,975	-	3,975
Insurance	1,520	-	1,520
Consultancy	1,540	872	2,412
Maintenance	1,930	-	1,930
Stationery and photocopying	1,021	33	1,054
Sundry expenses	1,966	-	1,966
Postage	1,299	5	1,304
Bank charges	914	-	914
Newsletter	2,831	-	2,831
Phone	2,707	-	2,707
All aboard planning	462	-	462
Social activities	182	-	182
TPT funding - overheads	-	11,420	11,420
Other costs	13,501	3,820	17,321
Total expenditure on charitable activities	267,821	113,011	380,832
Total expenditure	272,072	113,011	385,083

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

4. STAFF COSTS

	2024	2023
	£	£
Total staff costs comprise:		
Gross salaries	230,312	197,969
Employer's national insurance	16,223	13,915
Pension contributions	7,283	6,482
	253,827	218,366

Average number of employees 9.6 9.7

No employee received remuneration more than £60,000 in either year.

Key management personnel comprise 1 individual (2023: 1 individual) whose aggregate remuneration and benefits totalled £49,131 (2023: £46,216).

5. TRUSTEES AND RELATED PARTY TRANSACTIONS

No Trustee or any person connected with him or her received any remuneration, expenses or benefits during the year (2023: no Trustee).

No Trustee, or anyone connected with a Trustee, has a material interest in any of the Charity's transactions.

There were no other related party transactions in either the current or prior year.

6. DEBTORS

	2024	2023
	£	£
Trade debtors	25	1,622
Other debtors	42,033	44,738
	42,058	46,360

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

7. CREDITORS

	2024	2023
	£	£
Trade creditors	10,258	8,023
Other creditors	13,794	25,648
	24,052	33,671

8. UNRESTRICTED FUNDS

As at 31 March 2024	Balance 1 April 2023	Income	Expenditure	Transfer	Balance 31 March 2024
	£	£	£	£	£
Unrestricted funds					
General funds	34,105	131,618	(188,047)	65,000	42,676
Designated funds					
Building fund	65,000	-	-	(65,000)	-
	99,105	131,618	(188,047)	-	42,676

As at 31 March 2023	Balance 1 April 2022	Income	Expenditure	Transfer	Balance 31 March 2023
	£	£	£	£	£
Unrestricted funds					
General funds	40,952	165,225	(272,072)	100,000	34,105
Designated funds					
Building fund	165,000	-	-	(100,000)	65,000
	205,952	165,225	(272,072)	-	99,105

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

8. UNRESTRICTED FUNDS (Cont.)

Designated Building Fund

The purpose of the Building Fund was to enable the Charity to acquire its own premises at some time in the future.

9. RESTRICTED FUNDS

As at 31 March 2024

	Balance 1 April 2023 £	Income £	Expenditure £	Transfer £	Balance 31 March 2024 £
Eye Clinic Services	64,331	28,415	(28,770)	-	63,976
Lottery Fund	(12,982)	138,523	(126,888)	-	(1,347)
TPT Fund	3,000	29,675	(13,841)	-	18,834
Other	-	29,020	-	-	29,020
Total	54,349	225,633	(169,499)	-	110,483

Eye Clinic Information and Support Services

These services provide practical and emotional support to patients with a diagnosis of permanent sight loss. They operate from within the Eye Clinic Outpatients Department at York and Scarborough Hospitals and other locations commutable from York. The staff members (Eye Clinic Liaison Officers) also work with Hospital staff on issues of service delivery for blind and partially sighted patients.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

9. RESTRICTED FUNDS (Cont)

Lottery Fund

The Fund was originally conceived to support our members to access activities in their own communities, however, the pandemic meant this became impossible to facilitate. The Fund kindly agreed to divert the funding to the Keeping in Touch project and online activity groups, to ensure visually impaired people were supported and had regular telephone contact, and were still able to engage socially despite the lockdowns and social distancing made necessary by Covid-19.

TPT Fund

The Thomas Pocklington Trust Fund was conceived to provide funding for a visually impaired intern, a children's project, and an employment advisor.

As at 31 March 2023

	Balances 1 April 2022 £	Income £	Expenditure £	Transfer £	Balances 31 March 2023 £
Eye Clinic Services	40,900	49,302	(25,871)	-	64,331
Lottery Fund	6,371	46,000	(65,353)	-	(12,982)
TPT Fund	-	24,787	(21,787)	-	3,000
Total	47,271	120,089	(113,011)	-	54,349

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2024

10. ANALYSIS OF NET ASSETS BETWEEN FUNDS

As at 31 March 2024	Restricted Funds	Designated Funds	Unrestricted Funds	2024 Total Funds
	£	£	£	£
Current assets	110,483	-	66,728	177,211
Current liabilities	-	-	(24,052)	(31,533)
	110,483	-	42,676	153,159

As at 31 March 2023	Restricted Funds	Designated Funds	Unrestricted Funds	2023 Total Funds
	£	£	£	£
Current assets	54,349	65,000	67,776	187,125
Current liabilities	-	-	(33,671)	(33,671)
	54,349	65,000	34,105	153,454

11. LEASE COMMITMENTS

Total commitments under non-cancellable operating leases are as follows:

	Land and buildings	
	2024	2023
	£	£
Due within one year	13,538	49,875
Due between two and five years	-	228,000
Due over five years	-	78,375
	13,538	356,250

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

**NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED
31 MARCH 2024**

**12. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH
2023**

	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2023 Total £
Income from:				
Donations and legacies	143,632	-	82,927	226,559
Other trading activities	8,832	-	-	8,832
Investment income	227	-	-	227
Income from charitable activities	12,534	-	37,162	49,696
Total income	165,225	-	120,089	285,314
Expenditure on:				
Expenditure on raising funds	4,251	-	-	4,251
Expenditure on charitable activities	267,821	-	113,011	380,832
Total expenditure	272,072	-	113,011	385,083
Net Movement for year	(106,847)	-	7,078	(99,769)
Transfers between funds	100,000	(100,000)	-	-
Balances at 1 April 2021	40,952	165,000	47,271	253,223
Balances At 31 March 2022	34,105	65,000	54,349	153,454

YORK BLIND & PARTIALLY SIGHTED SOCIETY

England & Wales - Charity number 1159188

Accounts

Registered Charity Number: 1159188

York Blind & Partially Sighted Society CIO

Operating as MySight York

Independently Examined

Trustees' Report and Financial Statements

For the Year Ended 31 March 2023

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION

Charity Name

York Blind & Partially Sighted Society

Charity Number

1159188

(Linked Charity 508914 York Blind and Partially Sighted Society)

Trustees

The following Trustees have held office since 1 April 2022: -

Martin Fawcett	Chair
Jean Haywood	Resigned 18 October 2022
Eleanor Tew	
Marc Taylor	Resigned 5 September 2022
Paul Broadberry	Resigned 30 January 2023
Annette Gamston	
Barbara Capaldi	
David Gawthorpe	
Nicola Walker	Appointed 20 March 2023
John Sole	Appointed 30 January 2023, Treasurer

Chief Executive

Scott Jobson

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION (Cont.)

Principal Address and Address for General Enquiries

14 Merchants Place
Merchantgate
York
YO1 9TU
Tel: 01904 636269
www.MySightYork.org

Independent Examiner

Alan Sidebottom FCA
Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9GZ

Bankers

Unity Bank plc
9 Brindley Place
Birmingham
B1 2HB

HSBC
13 Parliament Street
York
YO1 8XS

Virgin Money
Jubilee House
Newcastle-upon-Tyne
NE3 4PL

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Chairman's Report

The past few years have been particularly challenging for many organisations in the charitable sector. In response to Covid challenges we have seen many of the larger national charities restructuring their whole service offering, with some withdrawing from their premises and moving to remote working as a result of the cost and income challenges that face the sector and the whole country at the moment.

For MySight York, the situation is very similar.

The financial challenges the Charity faces continue and are exacerbated by the cost of living crisis that we are all experiencing. This will continue to mean, as we said last year, that we have to work harder for every pound we receive and continue to be as reliant on legacies as we have ever been. Our staff and volunteers remain vital to our ongoing success and achievement as much as ever.

The cost of living crisis, has impacted MySight York from at least 2 perspectives. There has been an understandable reduction in income from donations and legacies at the same time as demand for our services grows.

Just as importantly, as a responsible organisation that puts the welfare of its staff high on its agenda, we have reviewed pay and made some significant changes to contracts. We value the contribution all of our staff make enormously.

Whilst the year has been challenging, the Trustees have witnessed and supported significant change and success at MySight York:

- MySight York has made a successful bid to the National Lottery Fund for £310k over 3 years to develop awareness training based on 4 themes, commencing in April.
- Maintaining our services throughout and adapting to changing needs whilst similar organisations closed their doors.
- Reverting back to face-to-face AGM, held on 18th October 2022, and face to face Board meetings in the office.
- Our CEO, Scott Jobson is now a member of the York VCSE Assembly, connecting with the new Integrated Care Board (replacing the Clinical Commissioning Group).
- Undertaken a review of staff contracts, linking salaries to payscales ensuring equity.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Chairman's Report (Cont.)

In addition, there were a host of further commendable achievements during the year including:

- Recruiting and training new staff members.
- Continuing “Keeping in Touch” and “Home Connections” for our members.
- MySight York has been selected by Thomas Pocklington to deliver a £52k, Yorkshire wide project to support visually impaired people into employment or training.
- Recommencing the Talking Space counselling service with two volunteer counsellors.

Thanks go to CEO Scott Jobson and all the staff, who have continued to do an excellent job in challenging circumstances. Thanks must also be extended to all staff and volunteers who have endured a tough and challenging few years.

The Board of Trustees has been under review in the past year, with a significant recruitment drive undertaken to refresh the make-up of the Board and bring new skills. Through the year Jean Haywood resigned as Honorary Secretary after lengthy service, as did Marc Taylor and Paul Broadberry. However, we welcomed two new Trustees to the Board in John Sole and Nicola Walker. Outside this financial year under review (and into the next) we have also recruited two further Trustees adding to the structure and composition of the Board.

As we say every year, we pride ourselves on being a user led organisation, in touch with the needs of our members and enabling them to have a say in the running of our organisation, and a voice in service provision in York.

Our continued aim is to offer four core services:

- An Equipment and Information Centre at our premises in Merchantgate, York, providing individually tailored practical and emotional support and promoting independence and well-being.
- A Befriending Service providing 1-1 support that provides friendship, social opportunities and engagement in activities in the community.
- An Early Intervention, Information and Support Service (ECLO) at York Hospital Eye Clinic helping people with a newly diagnosed sight loss.
- A range of peer support, leisure and learning activities to increase people's

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Chairman's Report (Cont.)

confidence, well-being and independence, particularly in their local community.

Some of our forward aims will remain unchanged:

- maintain the level of core services that we currently provide, ensuring service users' needs and voice are at the heart of what we do.
- generate an increasing amount of non-statutory funding by a mixture of internal and external fundraising.
- ensure that we have the correct mix and skills from all staff and trustees and conform to the Charity Commission code.
- be responsive to a rapidly changing environment and requirement for service.

However, we must now look at doing this through a lens of sustainability. Through the past 3 years MySight York has come under considerable pressure financially and must respond accordingly, continually reviewing the services that we offer, the income that we can generate and the ongoing costs that we incur.

I would conclude by reiterating the thanks to all our staff, our volunteers, the Trustees, the National Lottery Fund, the Vale of York Clinical Commissioning Group, York Hospital Trust, the Thomas Pocklington Trust and multiple other grants and Trusts, all our generous sponsors, supporter and donors, in particular those members who have remembered us with legacies. Between them, they enable the Society to continue to provide such an excellent service.

Martin Fawcett

Martin Fawcett (Chair)

22/10/2023
..... 2023

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

The Trustees have prepared these Financial Statements in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) as detailed in the accounting policies.

Reference and administrative details

The Charity information on pages 1 and 2 forms part of this report.

Constitution

York Blind & Partially Sighted Society (the “Charity”) was registered as a CIO on 13 November 2014, number 1159188, succeeding York Blind and Partially Sighted Society (number 508914) which is now a linked Charity. On 1 April 2015, the activity and assets of York Blind and Partially Sighted Society were transferred across to the new CIO which commenced activities on that date.

The Trustees have taken advantage of the Charity Commission concession to link charities which have a common Trustee board allowing preparation of one set of financial statements for both charities.

Our Objectives and Activities

In planning the activities of the organisation, the Trustees have due regard to their duty to meet the Charity Commission’s requirements about public benefit. The Trustees ensure that the objective and aims of the organisation are carried out through its activities for the public benefit and details its achievements and activities in this report.

The object of the Charity is:

- To promote the welfare of people who are blind, partially sighted or substantially and permanently disabled by defective vision.

The aims are:

- To provide a range of services designed to meet the needs of visually impaired people including an Equipment and Information Centre and Outreach facilities.
- To promote the needs of visually impaired people to statutory and voluntary organisations.
- To maintain an up to date record of visually impaired people, whilst ensuring compliance with the GDPR and ePrivacy regulations.
- Any other activities deemed to be desirable to further the welfare of visually impaired people.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

The Society's Mission is to "advocate, develop and provide services and facilities which enable people who are blind or partially sighted achieve independence with dignity, in all aspects of life and sectors of Society".

Our services are available to any visually impaired person in York and surrounding areas, plus his/her supporters and professional staff. Free membership of MySight York is available automatically to anyone registered blind/severely sight impaired or partially sighted/sight impaired, and to any visually impaired person in need of services.

We have almost 1,700 people (members) on our database, a significant increase in the past 3 years. Much of the increase comes from members outside of our core region, coming to us when their local services retrenched or closed over the past few years.

It should be noted that services are provided free of charge generally. As our member/user base increases, there is an added burden around cost, which we need to fund.

We receive no Government funding and we are enormously reliant on our own fundraising activities, in a market which is becoming ever more competitive to secure funding. Legacies and donations are vitally important to ensure continued sustainability of MySight York and as we have seen over the past 3 years, when these are not as frequent or substantial, we can face difficulties. It will vitally important that we can continue to raise our profile to meet these objectives.

A continued focus of both staff and Trustees will be on how we continue to provide the services in an efficient manner; how we can control our costs and optimise our income streams and where best to do this from.

Achievements and Performance

1. Achievements

2022/23 was a significant year for our charity as we continued to expand our reach and enhance our services. Despite the seemingly never-ending list of challenges, we remained committed to supporting our members and adapting our operations to ensure we deliver what our members need and want.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

The demand for our services continued to rise, whilst the ability to attend and engage was made easier.

However, funding remained a constant concern, which focused our priorities.

During the year we were successful in our application to The National Lottery Reaching Communities Fund. The funding is over three years and will support the Community Connect Project. One of the main ambitions is to build a city where people with sight loss can be active and involved in their community, by forging new and lasting collaborations in areas including:

- Sports, health and wellbeing;
- Arts, crafts and humanities;
- Accessing information and communication technology; and
- Children and young people's activities

Next year will see us deliver on this project as well as the new Employment Support Project. Visually impaired people often face barriers when seeking employment. However, with the support of a specialist adviser, people with sight loss (across Yorkshire) can access a wider range of employment opportunities. We are now able to assist with job training, CV writing, linking with training providers, action plans and support sessions, job applications and interviews practice.

2. Performance

Equipment and Information Centre

Our equipment and information service plays a crucial role in facilitating accessibility, inclusion, and empowerment; via our second professionally qualified and experienced Eye Care Liaison Officer. By providing assistive technology, educational support, communication tools, and resources, it enables visually impaired people to overcome barriers, enhance independence, and participate more fully in various aspects of life, throughout their sight loss journey.

"I think you provide a unique service here...in the way that MySight York offers services."

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

“I really appreciate the reading lamp and the two magnifiers. The folder of reading material is very interesting and helpful too. It was really good to meet you and I am very pleased with the aids you provided me with.”

“Thank you for transforming the way I manage. It is wonderful the difference I have experienced.”

The equipment and information service provides numerous benefits and support to enhance the daily lives of those living with sight loss.

By providing Access to Assistive Technology, such as screen readers, magnifiers, audio books, braille displays, screen readers, tactile products (among others) visually impaired people are able to achieve a greater independence and quality of life. Indeed, by utilising these tools, people living with sight loss can access information, communicate, navigate their surroundings, and perform daily living tasks, more effectively; enabling them to stay connected with friends, family, and the broader community.

There were over 2,000 visits to the Equipment and Information centre with:

- 875 - Number of unique beneficiaries supported through E&I
- 114 – Number of items sent/delivered to door via the continuing Home Connections offer.

ECLO (Eye Clinic Liaison Officer) York Hospital Trust

MySight York continues to lead the work based in York Hospital’s Eye Clinic via our professional ECLO who provided support and assistance to individuals with sight loss or visual impairments. Our ECLO plays a crucial role in helping patients navigate the healthcare system, understand their eye conditions, and access appropriate services and support.

This role is more important than ever before with the number of people needing the service continuing to grow.

“Thank you, this has been brilliant. It is the first time anyone has talked to me about how I am feeling and the emotional impact. Just giving me time to think about my sight and being able to articulate how it affects me has been so helpful.”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

“The whole appointment has been very informative; we are new to this and were hoping you could give us some information which you have.”

“Thank you Helen for taking the time to listen to me today, you have been really helpful following that (issue with letters in an accessible format) up for me today. I am really pleased that you took the time to follow things up for me.”

“Dear Helen, My grateful thanks for safe and swift receipt of the copy of my letter. I have not seen this letter before now and would certainly have responded much earlier if I had. Many thanks to you for all your rapid help in tracking down this little mystery and to Deb at MySight York for her introduction. Your help will help me to catch up with some of the 12 months lost time.”

- 566 - Individual patients supported
- 1,500 - Contacts
- 174 - CVI registrations
- 668 - Referrals to organisations

Befriending Service

Our befriending services (telephone and face to face) continued to provide a crucial support system that enhances social connections, emotional well-being, and overall quality of life. They play a significant role in fostering inclusivity, promoting independence, and empowering people with visual impairments to lead connected lives.

We invested in new software that enhanced our offer making befriending calls easier, safer and more accessible for people with sight loss and the volunteers who support it.

“I really enjoy my chats with my volunteer. I look forward to each one.”

“I think the calls fulfil a need for (my client) to express herself and know that she is being heard but not judged. I am sometimes able to offer reassurance or give a different perspective. She would prefer not to be reliant on kind neighbours.”

“Having regular structured phone calls/quizzes helped to keep me focused. The last two years have gone by in a blur and there were weeks in a row when I had no idea what day of the week it was or when anything was going to change. Having these calls helped to keep me grounded and to focus on others rather than just myself and my own situation.”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

- 44 - clients receiving regular contact via the befriending service
- 1,172 - hours of befriending telephone calls
- 814 - calls made
- 346 - number of home visits
- 32 - number of dedicated volunteers

Groups and Activities

Peer support groups, training sessions, workshops, and social events foster a sense of community, offer a platform for sharing experiences, and provide emotional support for people living with sight loss.

- 1,590 – number of attendances at group sessions
- 287 – number of groups
- 443 – number of clients attended

Groups include:

- Exercise class
- Audio book group
- Discussion group
- Technology support group
- 121 Tech support
- Access group
- A support group for people who experience visual hallucinations
- Quiz group
- Piano tuition
- Support with MySight (*3 groups)
- Boccia
- Tennis
- Board Games
- Knit and Natter
- Chair exercise
- Walking group
- One-off event groups

“MySight York organised an activity yesterday, it was a trip to Heslington Hall. I have never felt so relaxed as I did for such a long time. Everyone was so caring and friendly, we had a truly wonderful time. We went on the bus with Vicky and came back by bus, it was in line with York University.”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

“You have been my lifeline to books.”

“Can I say how much I enjoyed the discussion group today...it was great.”

“So helpful, nothing is too much trouble. Esme’s Room was so supportive.”

Communications

Our newsletter continues to be our number one platform to provide accessible and relevant information. It keeps members informed, connected, and engaged.

We have continued to grow our online presence – we have over 1,800 followers on Facebook and Twitter (combined). However, we have now added LinkedIn to our social media reach, adding an additional 276 followers (businesses, organisations and individuals).

Our quarterly Newsletter is distributed to over 1,600 people in an accessible format, to clients, volunteers and organisations.

- 1048 clients – large print
- 197 clients – email (screen reader accessible)
- 55 clients – CD
- 44 clients – MP3 format
- 5 clients – Braille

We regularly receive wholly positive feedback:

“Your newsletter is so helpful, so informative. I return to it again and again. I came in after reading, and knew you’d have something to help me.”

“Amazing, informative newsletter. Thanks to everyone.”

“Just wanted to call to say how much I enjoyed the newsletter, it was really interesting and full of helpful information.”

Transcription Service

We continued to provide a transcription service principally used by York and Scarborough NHS Trust, to ensure patients within the trust receive information in their chosen format, thus meeting the accessible health standard.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

We also assisted local businesses and educational establishments to create accessible documents, such as Braille, audio or large print materials.

Talking Space (Counselling)

We were delighted to recommence this service following the impact of Covid. This specialist Counselling Service (Talking Space) proved to be extremely beneficial for people with sight loss, providing emotional support, coping strategies, and a safe space to express their feelings and concerns. Our aim is to continue to grow the service to meet the rising demand from our membership.

Fundraising and Income Generation

We continue to be reliant on donations from individuals and trusts to enable us to continue to provide services. Fundraising is crucial to our ability to deliver essential services, raise awareness, offer support, connect and build communities, and empower people with visual impairments.

Last year has again presented ongoing challenges for fundraising (with trusts and grants returning less than forecast) however 2023/24 will likely see a return to typical levels as trusts recover their Covid overspend.

The support of donors, trusts and the lottery however, will again be crucial in the next 12 months.

We are extremely grateful to all our funders, supporters and donors who value our work and the impact we have on the lives of people living with sight loss.

Financial Review

The Society sets an annual budget that is approved by the Trustees prior to the start of the financial year. Our full year income of £285,314 was exceeded in this financial year by our expenditure of £385,083. This produced a final result delivering a £99,769 deficit.

Our income and expenditure can be summarised:

- Income was largely consistent with the previous year across legacies, donations and other activities.
- Costs increased in the year to £385k from £326k in 2021/22.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Our recent levels of income can be further analysed as follows:

	2022/23	2021/22
Local authority / CCG funding	25,832	24,975
Donations, trusts, community fundraising	106,773	117,205
Legacies	70,043	34,196
Equipment sales	10,853	11,937
Lottery projects	46,000	98,701
TPT projects	24,787	-
Other	1,026	689
Total	285,314	287,703

The reduction in community fundraising and other income during 2022/23 continued to reflect the impact of Covid-19, which extended through significant periods of the financial year.

Legacy funding has continued to enable the Society to deliver the services its users value so highly and our thanks go to members' estates for their continued support.

Reserves policy and going concern

Free reserves of £34k were held at 31 March 2023. Free reserves exclude those reserves which are restricted, designated, or which can only be realised by disposing of fixed assets held for Charity use.

The Building Fund of £65k is a designated fund, which is set aside to ensure the organisation has, and will have in future, appropriate premises from which to operate (see note 8).

The policy of the Executive Committee is that the Society should retain free reserves covering 3 to 4 months' operating expenditure.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

Key Management Remuneration

The pay policy of staff is based on the NJC scales with progression where appropriate. Annual increases are normally in line with the national agreement and subject to affordability at the time. New staff salaries are approved by the Executive Committee and are considered after external benchmarking of the post.

Structure, Governance and Management

We pride ourselves on being a user led organisation, admitting as members anyone who is registered blind or partially sighted living with sight loss and in need of services.

The Charity is managed by an Executive Committee (Board of Trustees) of at least 8, but no more than 15 members. In accordance with the constitution, every effort is made to ensure that many Trustees are visually impaired people. All Trustees are required to retire at the Charity's annual general meeting but can offer themselves for re-election. New Trustees are either elected at the Annual General Meeting or co-opted by the board for the period to the next Annual General Meeting. New Trustees participate in induction training and an annual programme of Trustee training is organised by the Honorary Secretary and staff.

The Executive Committee meets bi-monthly, with additional meetings as and when required. A between meeting report is issued to Trustees by the Chief Executive. Day to day management of the organisation is delegated to the Chief Executive.

Plans

YBPSS Business Plan sets the future strategy of the organisation, based on Best Practice guidance nationally and local needs. The Trustees thereby wish to:

- deliver the activities identified in our Business Plan;
- continue to provide, develop and enhance the current range of core services and activities;
- consolidate and further develop fundraising activities so we will not be reliant on legacies;
- improve training and development of staff, trustees and volunteers.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

STAFF

The Society and the excellent services it provides at the various locations can continue only because of its staff who support all our members throughout all our activities. Once again, our thanks to them all for their contribution over the past year, which has again been challenging. I therefore wish to thank personally all current staff and those who contributed during the year.

Current staff

Scott Jobson	Chief Executive
Barbara Fairs	Deputy Chief Executive
Deborah Wheller	Sight Support Service Manager
Catherine Bamford	Volunteer Manager
Jenny Allott	Fundraiser – Trusts and Grants
Helen Flett	Eye Clinic Liaison Officer
Carol Etherington	Volunteer & Befriending Assistant
Vicky Smith	Community Involvement Officer
Louise Railton	Community Fundraiser
Dom Tooze	Employment Adviser
Jade Puckering	Intern

This report was approved by the Trustees on 22/10/2023 and signed on its behalf by:

Martin Fawcett

.....
M Fawcett (Chair)

John Sole

.....
J Sole (Treasurer)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and UK Accounting Standards (UK Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the Charity and of the incoming resources and application of resources of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provision of the trust deed. 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.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the UK governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED

I report to the Trustees on my examination of the accounts of the York Blind & Partially Sighted Society for the year ended 31 March 2023.

This report is made solely to the Charity's Trustees, as a body, in accordance with Section 145 of the Charities Act 2011. My independent examination work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an Independent Examiner's Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body, for my independent examination work, for this report, or for the opinions I have formed.

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 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do 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.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
YORK BLIND & PARTIALLY SIGHTED (Cont)**

Independent Examiner's Statement (Cont)

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.

Alan Sidebottom

24/10/2023

.....

Alan Sidebottom FCA

Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9G

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2023

	Note	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2023 Total £	2022 Total £
Income from:						
Donations, grants and legacies	2	143,632	-	82,927	226,559	232,342
Other trading activities	2	8,832	-	-	8,832	6,618
Investment income	2	227	-	-	227	89
Income from charitable activities	2	12,534	-	37,162	49,696	48,654
Total income		165,225	-	120,089	285,314	287,703
Expenditure on:						
Expenditure on raising funds	3	4,251	-	-	4,251	14,286
Expenditure on charitable activities	3	267,821	-	113,011	380,832	311,961
Total expenditure		272,072	-	113,011	385,083	326,247
Net income/(expenditure) for year		(106,847)	-	7,078	(99,769)	(38,544)
Transfers between funds		100,000	(100,000)	-	-	-
Net Movement in funds		(6,847)	(100,000)	7,078	(99,769)	(38,544)
Balances at 1 April 2022		40,952	165,000	47,271	253,223	291,767
Balances at 31 March 2023	10	34,105	65,000	54,349	153,454	253,223

The notes on pages 22 to 38 form part of these financial statements. All of the Charity's operations are classed as continuing.

A fully detailed Statement of Financial Activities for the year ended 31 March 2022 is shown at note 13.

**YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO
BALANCE SHEET AS AT 31 MARCH 2023**

	Note	2023 £	2022 £
CURRENT ASSETS			
Stock		9,456	6,316
Debtors	6	46,360	31,818
Cash in bank and in hand		131,309	246,731
		187,125	284,865
LIABILITIES: Amounts falling due within one year			
Creditors and accruals	7	(33,671)	(31,642)
NET CURRENT ASSETS		153,454	253,223
TOTAL ASSETS LESS CURRENT LIABILITIES		153,454	253,223

REPRESENTED BY:

FUNDS

Unrestricted	8	34,105	40,952
Designated – building fund	8	65,000	165,000
Restricted	9	54,349	47,271
	10	153,454	253,223

The financial statements were approved by the Trustees on ^{22/10/2023}..... and signed on its behalf by:

Martin Fawcett

.....
M Fawcett - Chairman

John Sole

.....
J Sole - Treasurer

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

Charity Information

York Blind & Partially Sighted Society is registered as a Charitable Incorporated Organisation under the Charities Act 2011. The address for general enquiries is York Blind and Partially Sighted Society, 14 Merchants Place, Merchantgate, York, YO1 9TU.

Accounting Convention

The financial statements have been prepared on a going concern basis in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) ("Charities SORP (FRS102)"), the Financial Reporting Standard applicable in the UK and Ireland ("FRS 102"), and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair' view. This departure has involved following Charities SORP (FRS 102) rather than Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

The financial statements are prepared in sterling which is the functional currency of the charity.

York Blind & Partially Sighted Society meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at cost or transaction value unless otherwise stated in the relevant accounting policy notes.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont)

Going Concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the company has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

Income

Income is recognised in full in the Statement of Financial Activities ("SoFA") in the year in which it is receivable. For subscriptions and rental income this is in the year in which it is receivable and for ticket sales and meeting suppers this is in the year in which the event occurs. Deferred income represents grants received specifically for future accounting periods.

Expenditure

Expenditure is included in the SoFA on an accrual's basis inclusive of any VAT that cannot be recovered and has been classified under headings that aggregate all costs related to the category.

All direct costs have been allocated across the functional categories of resources expended in the SoFA. Where costs cannot be directly attributed to headings, they have been apportioned on a basis consistent with the use of the resources.

The costs of generating funds relate to expenditure directly attributable to fundraising.

Costs of charitable activities include those costs incurred by the Charity in the delivery of its activities and services. Costs relating to an activity are allocated directly.

Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources.

Pensions

The Charity operates a defined contribution scheme for employees. Contributions are charged as an expense to the SoFA in the period in which they fall due.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont.)

Staff costs

The costs of short-term employee benefits are recognised as a liability and an expense where settlement of obligations does not fall within the same period.

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Operating lease agreements

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lessor are charged against income on a straight-line basis over the period of the lease.

Stock

Stock is valued at the lower of cost and net realisable value.

Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

The Charity has only financial assets and liabilities of a kind that qualify as basic financial instruments in accordance with section 11 of FRS 102. Basic financial instruments are initially recognised at transaction value and are subsequently measured at their settlement value.

Cash at bank and in hand

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity held for working capital.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont)

Debtors

Other debtors are recognised at the settlement amount due. Prepayments are valued at the amount prepaid.

Financial assets, other than those held at fair value through profit and loss, are assessed for indicators of impairment at each reporting end date.

Financial assets are impaired where there is objective evidence that, as a result of one or more events that occurred after the initial recognition of the financial asset, the estimated future cash flows have been affected. The impairment loss is recognised in the income and expenditure account.

Creditors, loans and provisions

Creditors, loans and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors, loans and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Financial liabilities

Financial liabilities are only derecognised when, and only when, the Charity's obligations are discharged, cancelled or they expire.

Amounts recognised as provisions are best estimates of the consideration required to settle the present obligation at the reporting end date, taking into account the risks and uncertainties surrounding the obligation.

Fund accounting

Unrestricted funds are funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity.

Designated funds are funds set aside by the Trustees out of unrestricted general funds for specific future purposes.

Restricted funds are funds which can be used only for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont)

Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

The Trustees are of the opinion that there are no estimates and assumptions which have a material impact on the carrying amounts of assets and liabilities.

Legacies

Legacies are recognised as income when probate has been granted, the charity has established its entitlement to the funds and where sufficient information is available to allow it to measure its entitlement.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME

As at 31 March 2023	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	12,140	12,140
Lottery Project	-	25,300	25,300
Postcode Lottery	-	20,700	20,700
TPT Project	-	24,787	24,787
Grant support	-	82,927	82,927
Donations	73,589	-	73,589
Legacies	70,043	-	70,043
Donations and legacies	143,632	-	143,632
Total donations, grants and legacies	143,632	82,927	226,559

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME (Cont.)

As at 31 March 2023 Continued	Unrestricted Funds £	Restricted Funds £	2023 Total Funds £
Other trading activities:			
Community fundraising	3,138	-	3,138
Income from work	5,694	-	5,694
Total trading activities	8,832	-	8,832
Investment income			
Bank interest	227	-	227
Income from charitable activities:			
Hospital Eye Clinic Service			
Vale of York CCG	-	11,330	11,330
York Hospital	-	25,832	25,832
Sales of equipment and aids	10,853	-	10,853
Social and group activities	882	-	882
Sundry income	799	-	799
Total income from charitable activities	12,534	37,162	49,696
Total income	165,225	120,089	285,314

During the year donations of £1,644 (2022: £600) were received from Trustees of the Society.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME (Cont.)

As at 31 March 2022	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	11,937	11,937
Lottery Project	-	98,701	98,701
Other	600	-	600
Grant support	600	110,638	111,238
Donations and gift aid	86,908	-	86,908
Legacies	34,196	-	34,196
Donations and legacies	121,104	-	121,104
Total donations, grants and legacies	121,704	110,638	232,342
Other trading activities:			
Community fundraising	2,518	-	2,518
Income from work	1,600	2,500	4,100
Total trading activities	4,118	2,500	6,618
Investment income			
Bank interest	89	-	89

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED MARCH 2023

2. INCOME (Cont)

	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Income from charitable activities:			
Vale of York CCG	-	11,141	11,141
York Hospital	-	24,975	24,975
Sales of equipment and aids	12,256	-	12,256
Social and group activities	132	-	132
Sundry income	150	-	150
Total income from charitable activities	12,538	36,116	48,654
Total income	138,449	149,254	287,703

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

3. EXPENDITURE

As at 31 March 2023	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Other	4,251	-	4,251
Total expenditure on raising funds	4,251	-	4,251
Expenditure on charitable activities			
Salaries (Note 4)	155,274	63,092	218,366
Rent, rates and service charges	58,700	-	58,700
Cost of equipment sold	6,738	-	6,738
Professional fees	11,061	-	11,061
Independent Examination	2,200	-	2,200
Lottery funding - overheads	-	27,292	27,292
Printed material	-	403	403
Lottery funding - equipment	-	6,074	6,074
Staff IT	3,975	-	3,975
Insurance	1,520	-	1,520
Consultancy	1,540	872	2,412
Maintenance	1,930	-	1,930
Stationery and photocopying	1,021	33	1,054
Sundry expenses	1,966	-	1,966
Postage	1,299	5	1,304
Bank charges	914	-	914
Newsletter	2,831	-	2,831
Phone	2,707	-	2,707
All aboard planning	462	-	462
Social activities	182	-	182
TPT funding - overheads	-	11,420	11,420
Other costs	13,501	3,820	17,321
Total expenditure on charitable activities	267,821	113,011	380,832
Total expenditure	272,072	113,011	385,083

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

3. EXPENDITURE (Cont.)

As at 31 March 2022	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Salaries (Note 4)	13,225	-	13,225
Other	1,061	-	1,061
Total expenditure on raising funds	14,286	-	14,286

Expenditure on charitable activities

Salaries (Note 4)	83,444	119,953	203,397
Rent, rates and service charges	45,845	-	45,845
Cost of equipment sold	11,446	-	11,446
Professional fees	5,724	-	5,724
Independent Examination	2,000	-	2,000
Outreach premises	-	6,000	6,000
Lottery funding: overheads	4,511	666	5,177
Printed material	-	1,109	1,109
Lottery funding: equipment	-	473	473
Staff It	1,442	-	1,442
Insurance	1,445	-	1,445
Consultancy	1,479	-	1,479
Maintenance	4,729	-	4,729
Stationery and photocopying	1,160	-	1,160
Sundry expenses	1,120	-	1,120
Postage	990	-	990
CRMS	-	972	972
Bank charges	928	-	928
Newsletter	3,896	-	3,896
Phone	1,093	-	1,093
All aboard planning	3,018	-	3,018
Independent Examination	2,000	-	2,000
Other costs	4,488	2,030	6,518
Total expenditure on charitable activities	180,758	131,203	311,961

Total expenditure	195,044	131,203	326,247
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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

4. STAFF COSTS

	2023 £	2022 £
Total staff costs comprise:		
Gross salaries	197,969	199,384
Employer's national insurance	13,915	11,576
Pension contributions	6,482	5,662
	218,366	216,622
Average number of employees	9.7	9.3

No employee received remuneration more than £60,000 in either year.

Key management personnel comprise 1 individual (2022: 1 individual) whose aggregate remuneration and benefits totalled £46,216 (2022: £43,770).

5. TRUSTEES AND RELATED PARTY TRANSACTIONS

No Trustee or any person connected with him or her received any remuneration, expenses or benefits during the year (2022: no Trustee).

No Trustee, or anyone connected with a Trustee, has a material interest in any of the Charity's transactions.

6. DEBTORS

	2023 £	2022 £
Trade debtors	1,622	150
Other debtors	44,738	31,668
	46,360	31,818

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

7. CREDITORS

	2023 £	2022 £
Trade creditors	8,023	4,891
Other creditors	25,648	26,751
	33,671	31,642

8. UNRESTRICTED FUNDS

As at 31 March 2023	Balance 1 April 2022 £	Income £	Expenditure £	Transfer £	Balance 31 March 2023 £
Unrestricted funds					
General funds	40,952	165,225	(272,072)	100,000	34,105
Designated funds					
Building fund	165,000	-	-	(100,000)	65,000
	205,952	165,225	(272,072)	-	99,105

As at 31 March 2022	Balance 1 April 2021 £	Income £	Expenditure £	Transfer £	Balance 31 March 2022 £
Unrestricted funds					
General funds	97,547	138,449	(195,044)	-	40,952
Designated funds					
Building fund	165,000	-	-	-	165,000
	262,547	138,449	(195,044)	-	205,952

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

8. UNRESTRICTED FUNDS (Cont)

Designated Building Fund

The purpose of the Building Fund is to enable the Charity to acquire its own premises at some time in the future. The Trustees are aware of their liability in terms of the current and any future lease and feel it prudent that the Building Fund remains as a separate item.

9. RESTRICTED FUNDS

As at 31 March 2023

	Balances 1 April 2022 £	Income £	Expenditure £	Transfer £	Balances 31 March 2023 £
Eye Clinic Services	40,900	49,302	(25,871)	-	64,331
Lottery Fund	6,371	46,000	(65,353)	-	(12,982)
TPT Fund	-	24,787	(21,787)	-	3,000
Total	47,271	120,089	(113,11)	-	54,349

Eye Clinic Information and Support Services

These services provide practical and emotional support to patients with a diagnosis of permanent sight loss. They operate from within the Eye Clinic Outpatients Department at York and Scarborough Hospitals and other locations commutable from York. The staff members (Eye Clinic Liaison Officers) also work with Hospital staff on issues of service delivery for blind and partially sighted patients.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

9. RESTRICTED FUNDS (Cont)

Lottery & Postcode Lottery Fund

The Fund was originally conceived to support our members to access activities in their own communities, however, the pandemic meant this became impossible to facilitate. The Fund kindly agreed to divert the funding to the Keeping in Touch project and online activity groups, to ensure visually impaired people were supported and had regular telephone contact, and were still able to engage socially despite the lockdowns and social distancing made necessary by Covid-19.

TPT Fund

The Thomas Pocklington Trust Fund was conceived to provide funding for a visually impaired intern, a children's project, and an employment advisor.

As at 31 March 2022

	Balances 1 April 2021 £	Income £	Expenditure £	Transfer £	Balances 31 March 2022 £
Eye Clinic Services	25,731	50,553	(35,384)	-	40,900
Lottery Fund	3,489	98,701	(95,819)	-	6,371
Total	29,220	149,254	(131,203)	-	47,271

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

10. ANALYSIS OF NET ASSETS BETWEEN FUNDS

As at 31 March 2023	Restricted Funds	Designated Funds	Unrestricted Funds	2023 Total Funds
	£	£	£	£
Current assets	54,349	65,000	67,776	187,125
Current liabilities	-	-	(33,671)	(33,671)
	54,349	65,000	34,105	153,454

As at 31 March 2022	Restricted Funds	Designated Funds	Unrestricted Funds	2022 Total Funds
	£	£	£	£
Current assets	47,271	165,000	72,594	284,865
Current liabilities	-	-	(31,642)	(31,642)
	47,271	165,000	40,952	253,223

11. LEASE COMMITMENTS

Total commitments under non-cancellable operating leases are as follows:

	Land and buildings	
	2023	2022
	£	£
Due within one year	49,875	49,875
Due between two and five years	228,000	228,000
Due over five years	78,375	128,250
	356,250	406,125

12. CONTINGENT ASSETS

At 31 March 2023, the charity had been notified of its entitlement to 0 (2022: 1) residuary legacies with Probate granted. The charity received further information within the financial year in relation to an unpaid legacy, therefore a provision has been introduced to reflect this.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED
31 MARCH 2023

13. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH
2022

	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2022 Total £
Income from:				
Donations and legacies	121,704	-	110,638	232,342
Other trading activities	4,118	-	2,500	6,618
Investment income	89	-	-	89
Income from charitable activities	12,538	-	36,116	48,654
Total income	138,449	-	149,254	287,703
Expenditure on:				
Expenditure on raising funds	14,286	-	-	14,286
Expenditure on charitable activities	180,758	-	131,203	311,961
Total expenditure	195,044	-	131,203	326,247
Net Movement for year	(56,595)	-	18,051	(38,544)
Balances at 1 April 2021	97,547	165,000	29,220	291,767
Balances At 31 March 2022	40,952	165,000	47,271	253,223

YORK BLIND & PARTIALLY SIGHTED SOCIETY

England & Wales - Charity number 1159188

Accounts

Registered Charity Number: 1159188

York Blind & Partially Sighted Society CIO

Operating as MySight York

Independently Examined

Annual Trustees' Report and Financial Statements

For the Year Ended 31 March 2022

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION

Charity Name

York Blind & Partially Sighted Society

Charity Number

1159188

(Linked Charity 508914 York Blind and Partially Sighted Society)

Trustees

The following Trustees have held office since 1 April 2021: -

Martin Fawcett	Chair
Jean Haywood	Hon Secretary
Eleanor Tew	
Anna Baldwin	Resigned 31 st May 2021
Marc Taylor	
Mark Hudson	
Annette Gamston	
Paul Broadberry	
Aaron Holmes	Resigned 25 th February 2022
Barbara Capaldi	
David Gawthorpe	

Chief Executive

Scott Jobson

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION (Cont.)

Principal Address and Address for General Enquiries

14 Merchants Place,
Merchantgate,
York, YO1 9TU
Tel: 01904 636269
www.MySightYork.org

Independent Examiner

Laura Masheder FCA DChA
Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9GZ

Bankers

Unity Bank plc
9 Brindley Place
Birmingham
B1 2HB

HSBC
13 Parliament Street
York
YO1 8XS

Virgin Bank Ltd
46 Coney Street
York
YO1 9NQ

Secure Trust Bank
One Arlestone Way
Solihull
West Midlands
B90 4LH

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Chairman's Report

In last year's report we commented on how challenging the 12 months since March 2020 had been. After a brief period of respite in 2021, Covid restrictions hit once again and we returned to some challenging periods. It has clearly been an unprecedented 2 years and one which has to some degree changed the way we operate fundamentally. We have adopted and embedded new ways of working which will hopefully stand us in good stead for whatever comes our way. After the issues of the pandemic we are now facing new and evolving challenges which show themselves in different ways. The financial challenges the Charity faces continue and are exacerbated by the cost of living crisis that we are all experiencing. This will continue to mean that we have to work harder for every pound we receive and continue to be as reliant on legacies as we have ever been. Our staff and volunteers remain vital to our ongoing success and achievement as much as ever.

Over the year the Trustees witnessed and supported continued success and achievement in the management of MySight York:

- Continuing to manage the challenges of Covid 19 and the pandemic in our community.
- Maintaining our services throughout and adapting to changing needs whilst similar organisations closed their doors.
- Once again holding an AGM remotely via Zoom on 26th October.
- Developed and utilised enhanced risk management skills across staff and Trustees alike to deal with the unpredictable environment, including also utilising (briefly) the governments furlough scheme.

In addition, there were a host of further commendable achievements during the year including:

- Being safe and compliant across all the changes advice and guidance from Government and keeping our hybrid offering in place throughout.
- Enabling our services to be available to users of organisations who had not been able to continue such provision.
- Recruiting and training new staff members when some existing staff took the opportunity to follow different paths.
- Continuing "Keeping in Touch" and "Home Connections" for our members.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Chairman's Report (Cont.)

Thanks go to CEO, Scott Jobson who has continued to do an excellent job in challenging circumstances. Thanks also must be extended to all staff and volunteers who have endured a tough and challenging 2 years.

Around the Board of Trustees we undertook a review actions and have built an action plan to further supplement the make-up of the Board going forwards. Core to that is the recruitment of Visually Impaired Trustees. This has always been a key objective, but despite a number of attempts at advertising to recruit, this has not been successful. A special task-force has been set-up to look at this as a priority.

As we say every year, we pride ourselves on being a user led organisation, in touch with the needs of our members and enabling them to have a say in the running of our organisation, and a voice in service provision in York.

Now getting back to a more normal pattern of operating we aim to continue to offer four core services:

- An Equipment and Information Centre at our premises in Merchantgate, York, providing individually tailored practical and emotional support and promoting independence and well-being.
- A Volunteer home visiting service providing 1-1 support that enables people to do the things they want to do.
- An Early Intervention, Information and Support Services (ECLO) at York Hospital Eye Clinic helping people with a newly diagnosed sight loss.
- An expanded range of peer support, leisure and learning activities to increase people's confidence, well-being and independence, particularly in their local community.

Our forward aims continue to be:

1. Maintain the level of core services that we currently provide, ensuring service users' needs and voice are at the heart of what we do;
2. Generate an increasing amount of non-statutory funding by a mixture of internal and external fundraising;
3. Ensure that we have the correct mix and skills from all staff and trustees and conform to the Charity Commission code;
4. Be responsive to a rapidly changing environment and requirement for service, particularly following the impact of Covid-19.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Chairman's Report (Cont.)

I would conclude by reiterating the thanks to all our staff, our volunteers, the Trustees, the National Lottery Fund, the Vale of York Clinical Commissioning Group, York Hospital Trust, multiple grants and Trusts, legacies all our generous sponsors and in particular those members who have remembered us with legacies. Between them they enable the Society to continue to provide such an excellent service.

Martin Fawcett Chair

The Trustees have prepared these Financial Statements in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) as detailed in the accounting policies.

Reference & Administrative Details

The Charity information on pages 1 and 2 forms part of this report.

Constitution

York Blind & Partially Sighted Society (the "Charity") was registered as a CIO on 13 November 2014, number 1159188, succeeding York Blind and Partially Sighted Society (number 508914) which is now a linked Charity. On 1 April 2015, the activity and assets of York Blind and Partially Sighted Society were transferred across to the new CIO which commenced activities on that date.

The Trustees have taken advantage of the Charity Commission concession to link charities which have a common Trustee board allowing preparation of one set of financial statements for both charities.

Our Objectives and Activities

In planning the activities of the organisation, the Trustees have due regard to their duty to meet the Charity Commission's requirements about public benefit. The Trustees ensure that the objective and aims of the organisation are carried out through its activities for the public benefit and details its achievements and activities in this report.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

The object of the Charity is:

- To promote the welfare of people who are blind, partially sighted or substantially and permanently disabled by defective vision.

The aims are:

- To provide a range of services designed to meet the needs of visually impaired people including an Equipment and Information Centre and Outreach facilities.
- To promote the needs of visually impaired people to statutory and voluntary organisations.
- To maintain an up to date record of visually impaired people, whilst ensuring compliance with the GDPR and ePrivacy regulations.
- Any other activities deemed to be desirable to further the welfare of visually impaired people.

The Society's Mission is to "advocate, develop and provide services and facilities which enable people who are blind or partially sighted achieve independence with dignity, in all aspects of life and sectors of Society".

Our services are available to any visually impaired person in York and surrounding areas, plus his/her supporters and professional staff. Free membership of MySight York is available automatically to anyone registered blind/severely sight impaired or partially sighted/sight impaired, and to any visually impaired person in need of services.

We have almost 1,200 people (members) on our database.

Services are provided free of charge, apart from purchases from the Equipment Centre, and a small charge for some activities.

Achievements and performance

1. Achievements

Background/context:

2021/22 started in the same unprecedented vein as the year preceding it. Covid-19 was still the most influential challenge to our organisation. April 2021 witnessed charities follow the government roadmap for the gradual lifting of lockdown.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Wider social distancing measures continued to apply and the 'rule of six' still impacted our charitable operations.

However, following a winter 'Plan B' and an accelerated vaccination programme, the latter quarter of 2021/22 started to feel, more like normal. Groups began to meet face to face, appointments were increasingly made 'in person' and the desire for home visits grew.

And whilst there was a significant request to a traditional working model, the desire for online/telephone/digital/hybrid model, also prevailed within our membership. Largely due to the considerable ongoing implications of the pandemic, on blind and partially sighted people.

Whilst some of our members found ways to work around shopping slots and negotiating the socially distanced environment, social isolation and the need for contact remained a priority.

Simultaneously, our organisation found itself facing new challenges, such as unprecedented staff turnover. In 2021/22 MySight York had 5 new starters and 8 leavers, making the changeover of staff considerable on such a small team. Experienced the world over, it was estimated that up to 50% of the country's workforce was seeking a change in employment due to the ongoing experiences of the pandemic.

Community fundraising had not restarted, as the continuing move towards a cashless society made the role (in its historic form) unfeasible in the short term.

As with the previous year, ever-changing guidelines meant our plans had to again, be fluid, adaptable, responsive and reactive.

Adaptation:

For all of our services we continued to operate a 'hybrid model' as we found it to be both future and pandemic proof. That is to say, that we regularly alternated and blended how we operate: face to face, telephone, Zoom, small groups, larger venues etc.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

We worked on the understanding that another lockdown could happen at any moment, and if that happened, we could be operational immediately. That flexibility and fluidity is something we're very proud of.

Next year will see us continue to develop our key priorities for a new future based around shared values, a commitment to. A future that blends best of the old with the best of the new:

- To engage with people in their homes (and outside) via our befriending service, whilst continuing to offer a telephone 'keeping in touch' service.
- Continue to provide specialist equipment and information both face to face and digitally, whilst retaining the ability to deliver direct to peoples' homes.
- Continue to connect members together (face to face and digitally) and form supportive thematic groups, and drive societal change.
- Continue to provide Eye Clinic support, offering support and advice to patients from the point of diagnosis, via our Eye Clinic Liaison Officer at York hospital.

2. Performance

Equipment and Information Centre

Our Equipment and Information service allows people to discuss their sight needs, at their own pace, with a trained, specialist advisor. This service provides uniquely valuable support for clients' practical and emotional needs, throughout their sight loss journey.

"I will always support My Sight York and try to tell as many people as possible about the wonderful work you are all doing. My mother benefitted enormously from belonging to the MD group and the resources you offer and I will always be grateful to you all for that."

"during Covid when things must have been so difficult for you all, I felt there was always someone there to call on if necessary."

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Following on from the previous year, it was still evident that we needed to continue to support our clients no matter the pandemic environment, with ongoing advice, information and equipment to help manage the daily challenges of living with sight loss. We used our Home Connections service more sparingly as face to face appointments increased:

- 150 - Number of Home Connections clients supported
- 342 - Equipment items sent/delivered to door

Sight Support Service - delivered by the ECLO (Eye Clinic Liaison Officer) York Hospital Trust

The service delivered at York Teaching Hospital continued despite staff changes and essential training to provide information, guidance, onward referral and vital emotional support to patients.

Our organisation has maintained a permanent attendance in the clinic, whilst offering patients in-person and telephone appointments.

"I have always felt well supported especially over recent times when my health has not been too brilliant. The work you do is fantastic."

- **337 - Patients Supported**
- **254 - Referrals to external organisations**
- **214 - CVI registrations**

Befriending Service

The retention of our telephone befriending service was an essential component of our befriending service delivery, with a simple purpose: to pair potentially isolated blind and partially sighted people with volunteer befrienders for a regular friendly telephone call.

Whilst the demand for this reduced and increased with each lifted lockdown rule, feedback demonstrated that these calls reduce clients' feelings of isolation and maintain their sense of self-confidence. They also provide an opportunity to raise queries or concerns, which can either be dealt with directly by the volunteer or

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

referred to MySight York staff. Queries have included difficulties with daily tasks such as cooking or reading, fear of leaving the house, accessing essential shopping and banking.

“A friendly well run organisation with a very committed staff.”

“Being part of the Keeping in Touch has been brilliant. It’s just so good to have somebody to talk to. We’ve got past that awkward stage and we know each other that well now - it’s lovely.”

“I have learnt a lot more about the problems people with sight loss face and how, through their inbuilt determination, they have overcome/live with them – some of their experiences have been very amusing and we have had many a laugh together. I now have a greater appreciation of the problems partially sighted people have.” (KIT Volunteer)

“The satisfaction of providing external conversation to someone who feels rather insular.” (KIT Volunteer)

“I think the calls fulfil a need for (my client) to express herself and know that she is being heard but not judged. I am sometimes able to offer reassurance or give a different perspective. She would prefer not to be reliant on kind neighbours.” (KIT Volunteer)

- 68 - clients receiving regular contact via the befriending service
- 901 - hours of KIT conversation
- 1,926 - calls made
- 19 home visiting clients
- 209 - number of home visits
- 569 - hours of face to face befriending
- 39 dedicated volunteers

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Community Lottery Project

The pandemic continued to impact on our social and support groups. We adapted to continue to run groups face to face, online and via conference call, including:

- Exercise class
- Audio book group
- Discussion group
- Technology support
- Access group
- A support group for people who experience visual hallucinations
- A quiz
- Support with MySight (*3 groups)
- Boccia – in the community
- Chair exercise – in the community (and with dial in)
- Walking group

We also invested in new technology such as Owl Labs Pro, that enabled us to hold meetings face to face, over the telephone and digitally over a webcam; simultaneously. This has been an extremely successful way to ensure that members can connect together to have the peer support they need and the opportunity to share ideas and concerns with the people with lived experience.

“I hadn't met another young person with a visual impairment since losing my sight in the pandemic. Some of the stories told really resonated with me”.

“I enjoy getting out and meeting other people and developing my skills. Meeting new people which is very nice.”

“Feel like I can carry on with past hobbies. Feel like I can maintain skills I already had when using the computer.”

“I feel connected with people in a similar position. I feel very relaxed talk about problems.”

“I've lived here for 20 years, I've walked here but never truly knew the place until today”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Communications

We have continued to (despite lockdowns), send out a quarterly newsletter to all of our members, in different accessible formats.

We have continued to grow our online presence – we have over 1,600 followers on Facebook and Twitter (combined).

Our Communications are core to our service, enabling us to connect with our members and the wider community in a way that is engaging, timely and accessible.

Our quarterly Newsletter is distributed free of charge to all our members and key professional partners. It includes a mix of information and service updates, news, features and articles by service users. The feedback we receive is universally positive and shows what a vital resource this is:

“Well done again on such a brilliant newsletter.”

“I always look forward to your newsletter, sent in a format I can read.”

Fundraising and Income Generation

2021/22 saw a decrease in our income on the previous year, predominantly due to a large legacy donation in 2020/21.

It still shows however how reliant we remain on donations from individuals and trusts to enable us to continue to provide services.

The last year has presented ongoing challenges for fundraising (especially community and events) however 2022/23 is likely to see a small return to typical community and event fundraising activities, as the demand for it grows (from the community and members alike). Again, we ought to be cautious and embed a new future-proof model (such as contactless options and digital donations).

The support of donors and trusts however, will again be crucial in the next 12 months.

We are deeply grateful to all our funders, supporters and donors for enabling us not only to maintain existing services, but to build on those we have developed in response to our clients' needs during the pandemic.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Financial Review

The Society sets an annual budget that is approved by the Trustees prior to the start of the financial year. Our full year income of £287,703 was exceeded in this financial year by our expenditure of £326,247. This produced a final result delivering a £38,544 deficit.

Our income and expenditure can be summarised:

- Income was lower than the previous year across legacies and donations. The difference to this year's results is the impact of legacies received in 2020/21.
- Costs of £326k were lower than last year at £372k.

Our recent levels of income can be further analysed as follows:

	2021/22	2020/21	2019/20
Local authority / CCG funding	24,975	50,553	44,483
Donations, trusts, community fundraising	117,205	161,994	147,133
Legacies	34,196	251,404	56,187
Equipment sales	11,937	6,430	13,502
Lottery projects	98,701	89,401	87,539
Other	689	1,630	17,475
Total	287,703	561,412	366,319

The reduction in community fundraising and other income during 2021/22 continued to reflect the impact of Covid-19, which extended through significant periods of the financial year.

Whilst lower, legacy funding has continued to enable the Society to deliver the services its users value so highly and our thanks go to members' estates for their continued support.

Reserves policy and going concern

Free reserves of £41k were held at 31 March 2022. Free reserves exclude those reserves which are restricted, designated, or which can only be realised by disposing of fixed assets held for Charity use.

The Building Fund of £165k is a designated fund, which is set aside to ensure the organisation has, and will have in future, appropriate premises from which to operate (see note 8).

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

The policy of the Executive Committee is that the Society should retain free reserves for 3 to 4 months' operating expenditure. At the end of this year, the Society held around 1.5 months' operating expenditure in free reserves and in light of recent events and economic conditions, we will keep this position under constant review.

Key Management Remuneration

The pay policy of staff is based on the NJC scales with progression where appropriate. Annual increases are normally in line with the national agreement and subject to affordability at the time. New staff salaries are approved by the Executive Committee and are considered after external benchmarking of the post.

Structure, Governance and Management

We pride ourselves on being a user led organisation, admitting as members anyone who is registered blind or partially sighted living with sight loss and in need of services.

The Charity is managed by an Executive Committee (Board of Trustees) of at least 8, but no more than 15 members. In accordance with the constitution, every effort is made to ensure that many Trustees are visually impaired people. All Trustees are required to retire at the Charity's annual general meeting but can offer themselves for re-election. New Trustees are either elected at the Annual General Meeting or co-opted by the board for the period to the next Annual General Meeting. New Trustees participate in induction training and an annual programme of Trustee training is organised by the Honorary Secretary and staff.

The Executive Committee meets bi-monthly, with additional meetings as and when required. A between meeting report is issued to Trustees by the Chief Executive. Day to day management of the organisation is delegated to the Chief Executive.

Plans

YBPSS Business Plan sets the future strategy of the organisation, based on Best Practice guidance nationally and local needs. The Trustees thereby wish to:

- deliver the activities identified in our Business Plan;
- continue to provide, develop and enhance the current range of core services and activities;
- consolidate and further develop fundraising activities so we will not be reliant on legacies;
- improve training and development of staff, trustees and volunteers.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

Covid-19

As part of their assessment of the going concern basis of preparation, the Trustees have considered the impact of the COVID-19 pandemic on the charity's activities, staff and the wider economies in which it operates. It is the view of the Trustees that the events which have significantly impacted the charity are the direct result of Government and international policy in response to the pandemic and such policy only arose after the balance sheet date.

Staff

The Society and the excellent services it provides at the various locations can continue only because of its staff who support all our members throughout all our activities. Once again, our thanks to them all for their contribution over the past year, which has again been challenging. I therefore wish to thank personally all current staff and those who contributed during the year.

Current staff

Scott Jobson	Chief Executive
Barbara Fairs	Business Manager
Deborah Wheller	Sight Support Service Manager
Catherine Bamford	Volunteer Manager
Jenny Allott	Fundraiser – Trusts and Grants (started 15.11.2021)
Helen Flett	Eye Clinic Liaison Officer (started 01.11.2021)
Carol Etherington	Volunteer & Befriending Assistant (started 01.02.2022)
Vicky Smith	Community Involvement Officer (started 26.07.2021)
Marina Savva	Receptionist (started 05.07.2021 - left 21.03.2022)
Christian Waite	Activities and Volunteer Co-ordinator (left 30.04.2022)
Aneta Sunara	Team Administrator (left 31.05.2021)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

- Caroline Robertson Training and Engagement Manager (left 30.06.2021)
- Deborah Cairns Research and Communications Officer (left 09.09.2021)
- Jade Burniston Early Intervention and Sight Support (left 23.04.2021)
- Michael Hickman Income Generation Manager (left 25.07.2021)
- Sally Chignell Community Engagement Officer (left 28.04.2021)
- Vanessa Camp Senior ECLO (left 09.08.2021)

This report was approved by the Trustees on 15/09/2022..... and signed on its behalf by:

Martin Fawcett
.....

Jean Haywood
.....

M Fawcett (Chair)

J Haywood (Honorary Secretary)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and UK Accounting Standards (UK Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the Charity and of the incoming resources and application of resources of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provision of the trust deed. 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.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the UK governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED

I report to the Trustees on my examination of the accounts of the York Blind & Partially Sighted Society for the year ended 31 March 2022.

This report is made solely to the Charity's Trustees, as a body, in accordance with Section 145 of the Charities Act 2011. My independent examination work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an Independent Examiner's Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body, for my independent examination work, for this report, or for the opinions I have formed.

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 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED

Independent Examiner's Statement (Cont.)

3. the accounts do 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.

Laura Masheder
.....

22/09/2022

Laura Masheder FCA DChA

Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9GZ

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2022

	Note	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2022 Total £	2021 Total £
Income from:						
Donations and legacies	2	121,704	-	110,638	232,342	498,770
Other trading activities	2	4,118	-	2,500	6,618	4,734
Investment income	2	89	-	-	89	697
Income from charitable activities	2	12,538	-	36,116	48,654	57,211
Total income		138,449	-	149,254	287,703	561,412
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Total expenditure		195,044	-	131,203	326,247	371,837
Net Movement for year		(56,595)	-	18,051	(38,544)	189,575
Balances at 1 April 2021		97,547	165,000	29,220	291,767	102,192
Balances At 31 March 2022	10	40,952	165,000	47,271	253,223	291,767

The notes on pages 22 – 37 form part of these financial statements.

All of the Charity's operations are classed as continuing.

A fully detailed Statement of Financial Activities for the year ended 31 March 2021 is shown at note 13.

**YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO
BALANCE SHEET AS AT 31 MARCH 2022**

	Note	2022	2021
		£	£
CURRENT ASSETS			
Stock		6,316	5,529
Debtors	6	31,818	4,036
Cash in bank and in hand		246,731	309,498
		284,865	319,063
LIABILITIES: Amount falling due within one year			
Creditors and accruals	7	(31,642)	(27,296)
NET CURRENT ASSETS			
		253,223	291,767
TOTAL ASSETS LESS CURRENT LIABILITIES			
	10	253,223	291,767

REPRESENTED BY:

FUNDS

Unrestricted	8	40,952	97,547
Designated – building fund	8	165,000	165,000
Restricted	9	47,271	29,220
	10	253,223	291,767

The financial statements were approved by the Trustees on ^{15/09/2022}..... and signed on its behalf by:

Jean Haywood

.....
J Haywood - Hon Secretary

Martin Fawcett

.....
M Fawcett - Chairman

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

1. Accounting Policies

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

Charity Information

York Blind & Partially Sighted Society is registered as a Charitable Incorporated Organisation under the Charities Act 2011. The address for general enquiries is York Blind and Partially Sighted Society, 14 Merchants Place, Merchantgate, York, YO1 9TU.

Accounting Convention

The financial statements have been prepared on a going concern basis in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) (“Charities SORP (FRS102)”), the Financial Reporting Standard applicable in the UK and Ireland (“FRS 102”), and the Charities Act 2011.

The financial statements have been prepared to give a ‘true and fair’ view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a ‘true and fair’ view. This departure has involved following Charities SORP (FRS 102) rather than Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

The financial statements are prepared in sterling which is the functional currency of the charity.

York Blind & Partially Sighted Society meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at cost or transaction value unless otherwise stated in the relevant accounting policy notes.

Going Concern

The Trustees have considered the wider economy and COVID-19. At the time of approving the financial statements, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

1. Accounting Policies (Cont.)

Income

Income is recognised in full in the Statement of Financial Activities (“SoFA”) in the year in which it is receivable. For subscriptions and rental income this is in the year in which it is receivable and for ticket sales and meeting suppers this is in the year in which the event occurs. Deferred income represents grants received specifically for future accounting periods.

Expenditure

Expenditure is included in the SoFA on an accrual’s basis inclusive of any VAT that cannot be recovered and has been classified under headings that aggregate all costs related to the category.

All direct costs have been allocated across the functional categories of resources expended in the SoFA. Where costs cannot be directly attributed to headings, they have been apportioned on a basis consistent with the use of the resources.

The costs of generating funds relate to expenditure directly attributable to fundraising.

Costs of charitable activities include those costs incurred by the Charity in the delivery of its activities and services. Costs relating to an activity are allocated directly.

Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources.

Pensions

The Charity operates a defined contribution scheme for employees. Contributions are charged as an expense to the SoFA in the period in which they fall due.

Staff costs

The costs of short-term employee benefits are recognised as a liability and an expense where settlement of obligations does not fall within the same period.

The cost of any unused holiday entitlement is recognised in the period in which the employee’s services are received.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

1. Accounting Policies (Cont.)

Operating lease agreements

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lessor are charged against income on a straight-line basis over the period of the lease.

Stock

Stock is valued at the lower of cost and net realisable value.

Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

The Charity has only financial assets and liabilities of a kind that qualify as basic financial instruments in accordance with section 11 of FRS 102. Basic financial instruments are initially recognised at transaction value and are subsequently measured at their settlement value.

Cash at bank and in hand

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity held for working capital.

Debtors

Other debtors are recognised at the settlement amount due. Prepayments are valued at the amount prepaid.

Financial assets, other than those held at fair value through profit and loss, are assessed for indicators of impairment at each reporting end date.

Financial assets are impaired where there is objective evidence that, as a result of one or more events that occurred after the initial recognition of the financial asset, the estimated future cash flows have been affected. The impairment loss is recognised in the income and expenditure account.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

1. Accounting Policies (Cont.)

Creditors, loans and provisions

Creditors, loans and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors, loans and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Financial Liabilities

Financial liabilities are only derecognised when, and only when, the Charity's obligations are discharged, cancelled or they expire.

Amounts recognised as provisions are best estimates of the consideration required to settle the present obligation at the reporting end date, taking into account the risks and uncertainties surrounding the obligation.

Fund accounting

Unrestricted funds are funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity.

Designated funds are funds set aside by the Trustees out of unrestricted general funds for specific future purposes.

Restricted funds are funds which can be used only for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor.

Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

Critical accounting estimates and judgements (Cont.)

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

1. Accounting Policies (Cont.)

The Trustees are of the opinion that there are no estimates and assumptions which have a material impact on the carrying amounts of assets and liabilities.

Legacies

Legacies are recognised as income when probate has been granted, the charity has established its entitlement to the funds and where sufficient information is available to allow it to measure its entitlement.

2. INCOME

As at 31 March 2022	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	11,937	11,937
Lottery Project	-	98,701	98,701
Other	600	-	600
Grant support	600	110,638	111,238
Donations	86,908	-	86,908
Legacies	34,196	-	34,196
Donations and legacies	121,104	-	121,104
Total donations, grants and legacies	121,704	110,638	232,342

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

2. INCOME (Cont.)

As at 31 March 2022 Continued	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Other trading activities:			
Community fundraising	2,518	-	2,518
Income from work	1,600	2,500	4,100
Total trading activities	4,118	2,500	6,618
Investment income			
Bank interest	89	-	89
Income from charitable activities:			
Hospital Eye Clinic Service			
Vale of York CCG	-	11,141	11,141
York Hospital	-	24,975	24,975
Sales of equipment and aids	12,256	-	12,256
Social and group activities	132	-	132
Sundry income	150	-	150
Total income from charitable activities	12,538	36,116	48,654
Total income	138,449	149,254	287,703

During the year donations of £600 (2021: £1,123) were received from Trustees of the Society.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

2. INCOME (Cont.)

As at 31 March 2021	Unrestricted Funds	Restricted Funds	2021 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	11,937	11,937
Lottery Project		89,401	89,401
Other	2,500		2,500
Grant support	2,500	101,338	103,838
Donations and gift aid	138,528	5,000	143,528
Legacies	251,404	-	251,404
Donations and legacies	389,932	5,000	394,932
Total donations, grants and legacies	392,432	106,338	498,770
Other trading activities:			
Community fundraising	2,194	-	2,194
Income from work	2,540	-	2,540
Total trading activities	4,734	-	4,734
Investment income			
Bank interest	697	-	697

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED MARCH 2022

2. INCOME (Cont.)

	Unrestricted Funds	Restricted Funds	2021 Total Funds
	£	£	£
Income from charitable activities:			
Vale of York CCG	-	11,141	11,141
York Hospital	-	24,975	24,975
Sales of equipment and aids	6,430	-	6,430
Social and group activities	75	-	75
Coronavirus Job Retention Scheme	9,590	-	9,590
Sundry income	-	5,000	5,000
Total income from charitable activities	16,095	41,116	57,211
Total income	413,958	147,454	561,412

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

3. EXPENDITURE

As at 31 March 2022	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Salaries (Note 4)	13,225	-	13,225
Other	1,061	-	1,061
Total expenditure on raising funds	14,286	-	14,286
Expenditure on charitable activities			
Salaries (Note 4)	83,444	119,953	203,397
Rent, rates and service charges	45,845	-	45,845
Cost of equipment sold	11,446	-	11,446
Professional fees	7,724	-	7,724
Outreach premises	-	6,000	6,000
Lottery funding: overheads	4,511	666	5,177
Printed material	-	1,109	1,109
Lottery funding: equipment	-	473	473
Staff It	1,442	-	1,442
Insurance	1,445	-	1,445
Consultancy	1,479	-	1,479
Maintenance	4,729	-	4,729
Stationery and photocopying	1,160	-	1,160
Sundry expenses	1,120	-	1,120
Postage	990	-	990
CRMS	-	972	972
Bank charges	928	-	928
Newsletter	3,896	-	3,896
Phone	1,093	-	1,093
All aboard planning	3,018	-	3,018
Independent Examination	2,000	-	2,000
Other costs	4,488	2,030	6,518
Total expenditure on charitable activities	180,758	131,203	311,961
Total expenditure	195,044	131,203	326,247

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

3. EXPENDITURE (Cont.)

As at 31 March 2021	Unrestricted Funds	Restricted Funds	2021 Total Funds
	£	£	£
Salaries (Note 4)	16,048	-	16,048
Other	1,341	-	1,341
Total expenditure on raising funds	17,389	-	17,389
Expenditure on charitable activities			
Salaries (Note 4)	105,546	127,394	232,940
Rent, rates and service charges	50,497	11,890	62,387
Cost of equipment sold	11,437	-	11,437
Professional fees	6,926	-	6,926
Outreach premises	-	6,000	6,000
Lottery funding: overheads	6,233	-	6,233
Printed material	3,316	-	3,316
Lottery funding: equipment	-	2,747	2,747
Staff It	2,245	-	2,245
Insurance	2,103	-	2,103
Consultancy	1,917	-	1,917
Maintenance	1,798	-	1,798
Stationery and photocopying	1,788	-	1,788
Sundry expenses	1,720	-	1,720
Postage	-	1,114	1,114
CRMS	998	-	998
Bank charges	-	972	972
Newsletter	917	-	917
Phone	870	-	870
All aboard planning	704	-	704
Independent Examination	1,000	-	1,000
Other costs	4,176	140	4,316
Total expenditure on charitable activities	204,191	150,257	354,448
Total expenditure	221,580	150,257	371,837

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

4. STAFF COSTS

	2022	2021
	£	£
<hr/>		
Total staff costs comprise:		
Gross salaries	199,384	229,048
Employer's national insurance	11,576	12,373
Pension contributions	5,662	6,536
Salary charges	-	1,031
	<hr/>	<hr/>
	216,622	248,988

Average number of employees 9.3 13.9

No employee received remuneration more than £60,000 in the year (2021: no employee).

Key management personnel comprise 1 individual (2021: 1 individual) whose aggregate remuneration and benefits totalled £43,770 (2021: £43,627).

5. TRUSTEES AND RELATED PARTY TRANSACTIONS

No Trustee or any person connected with him or her received any remuneration, expenses or benefits during the year (2021: no Trustee).

No Trustee, or anyone connected with a Trustee, has a material interest in any of the Charity's transactions.

6. DEBTORS

	2022	2021
	£	£
Trade debtors	150	1,015
Other debtors	31,668	3,021
	<hr/>	<hr/>
	31,818	4,036

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

**NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED
31 MARCH 2022**

7. CREDITORS

	2022	2021
	£	£
Trade creditors	4,891	5,565
Other creditors	26,751	21,731
	<u>31,642</u>	<u>27,296</u>

8. UNRESTRICTED FUNDS

As at 31 March 2022	Balance at Apr 2021 £	Income £	Expenditure £	Transfer £	Balance at Mar 2022 £
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Unrestricted funds

General funds	97,547	138,449	(195,044)	-	40,952
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Designated funds

Building fund	165,000	-	-		165,000
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	<u>262,547</u>	<u>138,449</u>	<u>(195,044)</u>	<u>-</u>	<u>205,952</u>
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As at 31 March 2021	Balance at Apr 2020 £	Income £	Expenditure £	Transfer £	Balance at Mar 2021 £
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Unrestricted funds

General funds	45,169	413,958	(221,580)	(140,000)	97,547
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Designated funds

Building fund	45,000	-	-	120,000	165,000
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	<u>90,169</u>	<u>413,958</u>	<u>(221,580)</u>	<u>(20,000)</u>	<u>262,547</u>
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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

8. UNRESTRICTED FUNDS (Cont.)

Designated Building Fund

The purpose of the Building Fund is to enable the Charity to acquire its own premises at some time in the future. The Trustees are aware of their liability in terms of the current and any future lease and feel it prudent that the Building Fund remains as a separate entity.

9. RESTRICTED FUNDS

As at 31 March 2022

	Balances at Apr 2021 £	Income £	Expenditure £	Transfer £	Balances at Mar 2022 £
Eye Clinic Services	25,731	50,553	(35,384)	-	40,900
Lottery Fund	3,489	98,701	(95,819)	-	6,371
Total	29,220	149,254	(131,203)	-	47,271

Eye Clinic Information and Support Services

These services provide practical and emotional support to patients with a diagnosis of permanent sight loss. They operate from within the Eye Clinic Outpatients Department at York and Scarborough Hospitals and other locations commutable from York. The staff members (Eye Clinic Liaison Officers) also work with Hospital staff on issues of service delivery for blind and partially sighted patients.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

9. RESTRICTED FUNDS (Cont.)

Lottery Fund

The Lottery Community Fund was originally conceived to support our members to access activities in their own communities, however, the pandemic meant this became impossible to facilitate. The Community Lottery Fund kindly agreed to divert the funding to the Keeping in Touch project and online activity groups, to ensure visually impaired people were supported and had regular telephone contact, and were still able to engage socially despite the lockdowns and social distancing made necessary by Covid-19.

As at 31 March 2021

	Balances at Apr 2020 £	Income £	Expenditure £	Transfer £	Balances at Mar 2021 £
Eye Clinic Services	3,324	58,053	(45,646)	10,000	25,731
Lottery Fund	8,699	89,401	(104,611)	10,000	3,489
Total	12,023	147,454	(150,257)	20,000	29,220

10. ANALYSIS OF NET ASSETS BETWEEN FUNDS

As at 31 March 2022	Restricted Funds £	Designated Funds £	Unrestricted Funds £	2022 Total Funds £
Current assets	47,271	165,000	72,594	284,865
Current liabilities	-	-	(31,642)	(31,642)
	47,271	165,000	40,952	253,223

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2022

10. ANALYSIS OF NET ASSETS BETWEEN FUNDS (Cont.)

As at 31 March 2021	Restricted Funds	Designated Funds	Unrestricted Funds	2021 Total Funds
	£	£	£	£
Current assets	29,220	165,000	124,843	319,063
Current liabilities	-	-	(27,296)	(27,296)
	29,220	165,000	97,547	291,767

11. LEASE COMMITMENTS

Total commitments under non-cancellable operating leases are as follows:

	Land and buildings	
	2022	2021
	£	£
Due within one year	49,875	49,875
Due between two and five years	228,000	228,000
Due over 5 Years	128,250	178,125
	406,125	456,000

12. Contingent Asset

At 31 March 2022, the charity had been notified of its entitlement to 1 (2021: 1) residuary legacy with Probate granted, the value of which is uncertain due to either insufficient information being available or due to potential claims on the estate. At the date when the accounts were signed, no further information had been received and so this legacy has not been accrued in full.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

**NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED
31 MARCH 2022**

13. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2021

	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2021 Total £
Income from:				
Donations and legacies	392,432	-	106,338	498,770
Other trading activities	4,734	-	-	4,734
Investment income	697	-	-	697
Income from charitable activities	16,095	-	41,116	57,211
Total income	413,958	-	147,454	561,412
Expenditure on:				
Expenditure on raising funds	17,389	-	-	17,389
Expenditure on charitable activities	204,191	-	150,257	354,448
Total expenditure	221,580	-	150,257	371,837
Net income/(expenditure)	192,378	-	(2,803)	189,575
Transfers between funds	(140,000)	120,000	20,000	-
Net Movement in funds	52,378	120,000	17,197	189,575
Balances at 1 April 2020	45,169	45,000	12,023	102,192
Balances At 31 March 2021	97,547	165,000	29,220	291,767

YORK BLIND & PARTIALLY SIGHTED SOCIETY

England & Wales - Charity number 1159188

Accounts

Registered Charity Number: 1159188

York Blind & Partially Sighted Society CIO

Operating as MySight York

Independently Examined

Annual Trustees' Report and Financial Statements

For the Year Ended 31 March 2021

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION

Charity Name

York Blind & Partially Sighted Society

Charity Number

1159188

(Linked Charity 508914 York Blind and Partially Sighted Society)

Trustees

The following Trustees have held office since 1 April 2020: -

Martin Fawcett	Chair
Jean Haywood	Hon Secretary
Eleanor Tew	
Anna Baldwin	Resigned 31 st May 2021
Marc Taylor	
Annette Gamston	
Paul Broadberry	
Aaron Holmes	Appointed 21 st June 2021
Barbara Capaldi	Appointed 13 th October 2020
David Gawthorpe	Appointed 13 th October 2020
Jim Wallace	Resigned 13 th October 2020
Mark Hudson	

Chief Executive

Karen Froggatt	Resigned 30 th June 2020
Scott Jobson	Appointed 30 th June 2020

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION (Cont.)

Principal Address and Address for General Enquiries

14 Merchants Place,
Merchantgate,
York, YO1 9TU
Tel: 01904 636269
www.MySightYork.org

Independent Examiner

Laura Masheder FCA DChA
Garbutt & Elliott LLP
Triune Court
Monks Cross Drive
York
YO32 9GZ

Bankers

Unity Bank plc
9 Brindley Place
Birmingham
B1 2HB

HSBC
13 Parliament Street
York
YO1 8XS

Virgin Bank Ltd
46 Coney Street
York
YO1 9NQ

Secure Trust Bank
One Arlestone Way
Solihull
West Midlands
B90 4LH

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

Chairman's Report

The past 12 months since March 2020, must have been one of the most challenging periods in recollection for MySight York. A change of Chief Executive and the start of a lengthy period of operating in a global pandemic, created unique conditions for all of our staff to operate in. This has been an unprecedented period through which MySight York has continued to find new and innovative ways to deliver its services. The Charity continues to operate in very challenging financial circumstances, with an ever-increasing reliance on legacies to maintain the increased demand for our core services, combined with a need to meet our committed costs. This increases the workload on the Charity's excellent staff and volunteers, who continue to show their professionalism, dedication and commitment in these extraordinary times.

Over the year the Trustees witnessed and supported significant developments in the management of MySight York:

- Dealing with the impact of Covid-19 from March 2020 and ensuring we maintained our services whilst keeping our staff safe.
- Enhanced use of technology to allow staff to work remotely (with the office closed for long periods) whilst maintaining high standards of service.
- An AGM which was held via Zoom on 13th October 2020.
- Developed and utilised enhanced risk management skills across staff and Trustees alike to deal with the unpredictable environment, including also utilising (briefly) the governments furlough scheme.

In addition, there were a host of further commendable achievements during the year including:

- The launch of the "Keeping in Touch" project; A team of volunteers, plus three staff members, were matched with clients to maintain regular telephone contact with those who are particularly vulnerable or at risk of isolation.
- The Home Connections project focusing on vital specialist equipment packed up and delivered by City of York Council and MySight York volunteers to people who needed them.
- The Reaching Out project, contacting hundreds of service users to understand how we are performing. This will be vital in shaping our future provision.
- Not least, remaining "open for business" when other similar organisations were unable to do so.

Thanks go to Karen Froggat who retired in June 2020, as CEO and to Scott Jobson

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

Chairman's Report (Cont.)

who replaced Karen and has done such an excellent job in difficult circumstances. My special thanks go to Jim Wallace who stood down as Chairman in October 2020 after a distinguished period of service.

Whilst outside of the period of this report, there were recent changes to the make-up of the Board of Trustees too. In May 2021, Anna Baldwin stood down after 5 years of service with the Board, and Aaron Holmes joined us too in May joining Barbara Capaldi and David Gawthorpe, who both joined in 2020.

As has been repeatedly said, we pride ourselves on being a user led organisation, in touch with the needs of our members and enabling them to have a say in the running of our organisation, and a voice in service provision in York.

As the restrictions driven by Corona Virus lift we will aim to continue to offer four core services:

- An Equipment and Information Centre at our premises in Merchantgate, York, providing individually tailored practical and emotional support and promoting independence and well-being.
- A Volunteer home visiting service providing 1-1 support that enables people to do the things they want to do.
- An Early Intervention, Information and Support Services (ECLO) at York Hospital Eye Clinic helping people with a newly diagnosed sight loss.
- An expanded range of peer support, leisure and learning activities to increase people's confidence, well-being and independence, particularly in their local community.

Our forward aims are to:

1. maintain the level of core services that we currently provide, ensuring service users' needs and voice are at the heart of what we do;
2. generate an increasing amount of non-statutory funding by a mixture of internal and external fundraising;
3. ensure that we have the correct mix and skills from all staff and trustees and conform to the Charity Commission code;
4. be responsive to a rapidly changing environment and requirement for service, particularly following the impact of Covid-19.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

Chairman's Report (Cont.)

I would conclude by also thanking all our staff, our volunteers, the Trustees, the National Lottery Fund, City of York Council, the Vale of York Clinical Commissioning Group, York Hospital Trust, RNIB, all our generous sponsors and in particular those members who have remembered us with legacies. Between them they enable the Society to continue to provide such an excellent service.

Martin Fawcett Chair

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

The Trustees have prepared these Financial Statements in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) as detailed in the accounting policies.

Reference & Administrative Details

The Charity information on pages 1 and 2 forms part of this report.

Constitution

York Blind & Partially Sighted Society (the "Charity") was registered as a CIO on 13 November 2014, number 1159188, succeeding York Blind and Partially Sighted Society (number 508914) which is now a linked Charity. On 1 April 2015, the activity and assets of York Blind and Partially Sighted Society were transferred across to the new CIO which commenced activities on that date.

The Trustees have taken advantage of the Charity Commission concession to link charities which have a common Trustee board allowing preparation of one set of financial statements for both charities.

Our Objectives and Activities

In planning the activities of the organisation, the Trustees have due regard to their duty to meet the Charity Commission's requirements about public benefit. The Trustees ensure that the objective and aims of the organisation are carried out through its activities for the public benefit and details its achievements and activities in this report.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

The object of the Charity is:

- To promote the welfare of people who are blind, partially sighted or substantially and permanently disabled by defective vision.

The aims are: -

- To provide a range of services designed to meet the needs of visually impaired people including an Equipment and Information Centre and Outreach facilities.
- To promote the needs of visually impaired people to statutory and voluntary organisations.
- To maintain an up to date record of visually impaired people, whilst ensuring compliance with the GDPR and ePrivacy regulations.
- Any other activities deemed to be desirable to further the welfare of visually impaired people.

The Society's Mission is to "advocate, develop and provide services and facilities which enable people who are blind or partially sighted achieve independence with dignity, in all aspects of life and sectors of Society".

Our services are available to any visually impaired person in York and surrounding areas, plus his/her supporters and professional staff. Free membership of MySight York is available automatically to anyone registered blind/severely sight impaired or partially sighted/sight impaired, and to any visually impaired person in need of services.

We have almost 1,200 people (members) on our database.

Services are provided free of charge, apart from purchases from the Equipment Centre, and a small charge for some activities.

Achievements and performance

1. Achievements

Background/context:

2020/21 has been a year like no other. Unparalleled. Unprecedented. When the COVID-19 pandemic hit, our services were never more needed; whilst organisationally we were never more in need.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

For our members, the immediate impact was considerable. For someone who cannot see, and who therefore has to touch more than a sighted person, navigating the world became ever more challenging. New demands such as social distancing, booking online shopping slots, and negotiating an increasingly digital world, brought a fresh urgency to our services. At the same time, our organisation found itself facing challenges of a kind no-one had ever experienced before. Community fundraising stopped overnight and almost all face to face activity stood still.

Ever-changing guidelines meant our plans had to be fluid, adaptable, responsive and reactive.

Adaptation:

We immediately created online and telephone groups, to connect our members to each other and to up-to-date advice and services. We created a local information guide as a volunteer aide to these essential calls.

We developed a bespoke 'Home Connections' delivery service which supplies specialist equipment direct to people's homes, whilst creating an appointment system for the Equipment & Information Service, enabling face to face assessments.

Our much-valued Home Visiting Service transitioned into the Keeping in Touch project, pairing potentially isolated blind and partially sighted people with trained volunteers for a regular friendly phone call. At the same time our Eye Clinic Liaison Officer continued to work from York Teaching Hospital, offering support and advice to patients from the point of diagnosis.

2021/22 will see us further develop our key priorities for a new future based around shared values, a commitment to collaborate and to build trust by doing what we say we'll do. A future that blends the best of the old with the best of the new:

- To retain telephone befriending service whilst re-engaging people in their homes.
- To provide specialist equipment direct to peoples' homes whilst offering a place for a face to face appointment.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

- To connect members together (face to face and digitally) and form peer to peer thematic groups, and drive societal change.

All of this was achieved through the efforts of the most dedicated, hard-working, professional and creative team of staff and volunteers. With each member building upon the shared experiences of those with sight loss in York, each experiencing a visual world in a different and personally unique way.

We are very proud to be part of an extremely talented organisation, which truly never stands still.

2. Performance **Equipment and Information Centre**

Our Equipment and Information service allows people to discuss their sight needs, at their own pace, with a trained, specialist advisor. This service provides uniquely valuable support for clients' practical and emotional needs, throughout their sight loss journey.

In a recent survey:

- 100% of Equipment and Information service users would recommend the service to someone in a similar position.
- 97% said they could make use of helpful aids and equipment at least some of the time, 6 weeks after visiting us.
- Over 2/3 said they could use helpful aids and equipment either 'Often' or 'All of the time'.
- Overall, clients reported a statistically significant positive change in their mental wellbeing 6 weeks after their visit.

"Until you go to somewhere like MySight you don't know what is out there. The quality of staff is superb – they know what they are talking about."

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

“It’s an absolute Godsend. I’ve never known people to care so much. They’ve helped me overcome something that could have led to depression and isolation. Nothing’s too much trouble.”

“Without them there would be a lot of lost and lonely people.”

“It is life changing.”

As the first lockdown set in, it became clear that we needed to find a way to support our clients with ongoing advice, information and equipment to help manage the daily challenges of living with sight loss. Our Home Connections service was born out of that need. Clients spend time discussing their needs with an expert advisor. Equipment is then posted or delivered to their doorstep by a volunteer, enabling the client to try a range of solutions in their home environment and in their own time. The service is unlimited - clients have benefited from exploring up to 20 different pieces of equipment in the course of the year.

- 189 - Number of clients supported
- 459 - Equipment items sent/delivered
- 490 - Doorstep deliveries/collections

Sight Support Service - delivered by the ECLO (Eye Clinic Liaison Officer) York Hospital Trust

The Sight Support Service has continued throughout the pandemic to provide information, guidance, onward referral and vital emotional support to patients at York Hospital.

Our Eye Clinic Liaison Officer has maintained a regular presence in the clinic, whilst offering patients telephone appointments, in line with government guidelines.

“It was really nice talking to you when you phoned and it really made me feel supported. Thank you again for all your help and thoughtfulness.”

Wife of a patient

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

"I didn't think you'd still be working and I'm so grateful to you for ringing and talking to me as I've not seen or spoken to anyone for two weeks. It was really lovely to talk to somebody who understands my sight difficulties and I feel reassured and less anxious about the future now I know about the services available. I would be very pleased to have a follow up appointment in the future so I can put a face to the voice that has helped me to feel so much better. Thank you."

Sight Support Service patient

697 - Patients Supported

538 - Referrals to external organisations

79 - CVI registrations

Home Visiting Service

Our brand-new telephone befriending service was set up in April 2020 with a simple purpose: to pair potentially isolated blind and partially sighted people with volunteer befrienders for a regular friendly telephone call.

Feedback clearly demonstrates that these calls reduce clients' feelings of isolation and maintain their sense of self-confidence. They also provide an opportunity to raise queries or concerns, which can either be dealt with directly by the volunteer or referred to MySight York staff. Queries have included difficulties with daily tasks such as cooking or reading, fear of leaving the house, accessing essential shopping and banking.

"It's been a lifeline - it's been a difficult time. I think I might have disappeared into a black hole if I hadn't been able to keep in touch with people."

"It made me feel part of something, that they were looking out for me. I look forward to talking and having someone to relate my problems to. It's just good to know there is someone I can turn to for help."

- 116 - clients receiving regular befriending calls
- 45 - volunteers
- 1,453 - hours of conversation
- 2,360 - calls made
- 100% of clients/volunteers said they would like to continue with calls as lockdown progressed

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

Community Lottery Project

The pandemic impacted greatly on our regular social and support groups. We adapted to continue to run groups both online and via conference call, including:

- Exercise class
- Audio book group
- Discussion group
- Technology support
- Access group
- A support group for people who experience visual hallucinations
- A quiz
- Support with MySight (*3 groups)

This has proved a successful way to ensure that members still have the peer support they need and the opportunity to share ideas and concerns with the people with lived experience.

“I don’t live in York and getting to groups in your office was difficult for me. This is a lovely opportunity for me to take part.”

“I’ve just come off the phone with the discussion group. It was really super. Looking forward to the next time.”

Following the government’s second lockdown announcement we launched a brand-new project called: ‘Reaching Out’. This has three aims:

- to ensure our member data is up-to-date
- to collect information on views, opinions and needs
- to connect to each other and to local services.

As a result of this huge piece of research, we will be better equipped to understand the lived experience of local blind and partially sighted people. From that understanding we will build a picture of how we can indeed enable people in York to live well with sight loss.

Communications

We have continued to (despite lockdowns), send out a quarterly newsletter to all of our members, in different accessible formats.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

We have continued to grow our online presence – we have over 1,500 followers on Facebook and Twitter (combined).

Our Communications are core to our service, enabling us to connect with our members and the wider community in a way that is engaging, timely and accessible.

Our quarterly Newsletter is distributed free of charge to all our members and key professional partners. It includes a mix of information and service updates, news, features and articles by service users. The feedback we receive is universally positive and shows what a vital resource this is:

“Again a splendid Newsletter... It is so wonderful and encouraging.”

“The Newsletter is brilliant – 10 out of 10!”

Our digital channels are also growing in importance. Our website received 5,726 visits from 4,223 users during the year, 73% of whom were new visitors. Positive feedback on the site reflects our continuing commitment to relevant, up-to-date and accessible communications.

Our presence on social media also continued to grow throughout the year:

Facebook increased by +39% and Twitter by +15%.

Fundraising and Income Generation

2021/21 saw an increase in our income on previous years, predominantly due to a large legacy donation, which amounted to 43% of our total.

The more typical 2019/20 figures, by contrast, show the degree to which we remain dependent on donations from individuals and trusts to enable us to continue to provide services.

The last year has presented significant challenges and, with opportunities for fundraising (especially community and events) likely to remain limited for the foreseeable future, the support of donors and trusts will again be crucial in the next 12 months.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

We are deeply grateful to all our funders for enabling us not only to maintain existing services, but to build on those we have developed in response to our clients' needs during the pandemic.

Financial Review

The Society sets an annual budget that is approved by the Trustees prior to the start of the financial year, with a budgeted surplus of £128k anticipated. Our full year income exceeded expenditure by £190k due to legacies of over £241k in the year. Our income and expenditure can be summarised:

- Income of £561k was £195k above that achieved in 2019/2020 and reflected the significantly increased legacies, continued lottery funding and increased trusts and donations. Income exceeded our budget by £69k. A detailed analysis of income is tabled below.
- Costs of £372k were £33k (8%) lower than the previous year with slightly lower staffing costs and that 2019/20 included one off costs relating to the relocation to our new premises. Staffing costs continue to equate to two thirds of our annual costs.

Our recent levels of income can be further analysed as follows:

	2020/21	2019/20	2018/19
Local authority / CCG funding	50,553	44,483	49,355
Donations, trusts, community fundraising	161,994	147,133	117,047
Legacies	251,404	56,187	107,356
Equipment sales	6,430	13,502	11,973
Lottery projects	89,401	87,539	4,502
Other	1,630	17,475	32,515
Total	561,412	366,319	322,748

Despite the restriction of our activities through the closure of our office during Covid 19 lockdowns our income generation team, and indeed all staff, we have seen our income excluding legacies maintained above £300k. This coupled with our three-year lottery income provides a significant level of comfort to the Trustees. Particularly as, our level of “contractual funding” reduced to its lowest ever level at nine percent of our 2020/21 revenues.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

The reduction in community fundraising and other income during 2020/21 reflects the impact of Covid-19.

Legacy funding has enabled the Society to deliver the services its users value so highly and our thanks go to members' estates for their particularly significant bequests in 2020/21.

Reserves policy and going concern

Free reserves of £98k were held at 31 March 2021. Free reserves exclude those reserves which are restricted, designated, or which can only be realised by disposing of fixed assets held for Charity use.

The Building Fund of £165k is a designated fund, which is set aside to ensure the organisation has, and will have in future, appropriate premises from which to operate (see note 8).

The policy of the Executive Committee is that the Society should retain free reserves for 3 to 4 months' operating expenditure. This policy is reviewed annually. At the end of this year, the Society held around 3.15 months' operating expenditure in free reserves.

Key Management Remuneration

The pay policy of staff is based on the NJC scales with progression where appropriate. Annual increases are normally in line with the national agreement and subject to affordability at the time. New staff salaries are approved by the Executive Committee and are considered after external benchmarking of the post.

Structure, Governance and Management

We pride ourselves on being a user led organisation, admitting as members anyone who is registered blind or partially sighted living with sight loss and in need of services.

The Charity is managed by an Executive Committee (Board of Trustees) of at least 8, but no more than 15 members. In accordance with the constitution, every effort is made to ensure that many Trustees are visually impaired people. All Trustees are required to retire at the Charity's annual general meeting but can offer themselves for re-election. New Trustees are either elected at the Annual General Meeting or co-opted by the board for the period to the next Annual General Meeting. New Trustees participate in induction training and an annual programme of Trustee training is organised by the Honorary Secretary and staff.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

The Executive Committee meets bi-monthly, with additional meetings as and when required. A between meeting report is issued to Trustees by the Chief Executive. Day to day management of the organisation is delegated to the Chief Executive.

Plans

YBPSS Business Plan sets the future strategy of the organisation, based on Best Practice guidance nationally and local needs. The Trustees thereby wish to:

- deliver the activities identified in our Business Plan;
- continue to provide, develop and enhance the current range of core services and activities;
- consolidate and further develop fundraising activities so we will not be reliant on legacies;
- improve training and development of staff, trustees and volunteers.

Covid-19

As part of their assessment of the going concern basis of preparation, the Trustees have considered the impact of the COVID-19 pandemic on the charity's activities, staff and the wider economies in which it operates.

STAFF

The Society and the excellent services it provides at the various locations can continue only because of its staff who support all our members throughout all our activities. Once again, our thanks to them all for their contribution over the past year, which has again been challenging. I therefore wish to thank personally all current staff and those who contributed during the year.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021 (Cont)

Current staff

Scott Jobson	Chief Executive
Aneta Sunara	Team Administrator
Barbara Fairs	Business Manager
Caroline Robertson	Training and Engagement Manager
Catherine Bamford	Volunteer Manager
Lizzy Powell	Community Fundraising
Christian Waite	Activities and Volunteer Co-ordinator
Deborah Cairns	Research and Communications Officer
Deborah Wheller	Sight Support Service Manager
Jade Burniston	Early Intervention and Sight Support
Michael Hickman	Income Generation Manager
Sally Chignell	Community Engagement Officer
Vanessa Camp	Senior ECLO

This report was approved by the Trustees on.....^{20/09/2021} and signed on its behalf by:



.....

M Fawcett (Chair)



.....

J Haywood (Honorary Secretary)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and UK Accounting Standards (UK Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the Charity and of the incoming resources and application of resources of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provision of the trust deed. 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.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the UK governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED

I report to the Trustees on my examination of the accounts of the York Blind & Partially Sighted Society for the year ended 31 March 2021.

This report is made solely to the Charity's Trustees, as a body, in accordance with Section 145 of the Charities Act 2011. My independent examination work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an Independent Examiner's Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body, for my independent examination work, for this report, or for the opinions I have formed.

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 all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

Since the Charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

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

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED

Independent Examiner's Statement (Cont.)

3. the accounts do 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.

Laura Masheder

.....

20/09/2021

.....

Laura Masheder FCA DChA
Garbutt & Elliott LLP

Chartered Accountants

Triune Court
Monks Cross Drive
York
YO32 9GZ

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2021

	Note	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2021 Total £	2020 Total £
Income from:						
Donations and legacies	2	392,432	-	106,338	498,770	275,734
Other trading activities	2	4,734	-	-	4,734	14,601
Investment income	2	697	-	-	697	374
Income from charitable activities	2	16,095	-	41,116	57,211	75,610
Total income		413,958	-	147,454	561,412	366,319
Expenditure on:						
Expenditure on raising funds	3	17,389	-	-	17,389	42,687
Expenditure on charitable activities	3	204,191	-	150,257	354,448	361,817
Total expenditure		221,580	-	150,257	371,837	404,504
Net (expenditure)/income Transfers		192,378 (140,000)	- 120,000	(2,803) 20,000	189,575 -	(38,185) -
Net Movement for year		52,378	120,000	17,197	189,575	(38,185)
Balances at 1 April 2020		45,169	45,000	12,023	102,192	140,377
Balances At 31 March 2021	10	97,547	165,000	29,220	291,767	102,192

The notes on pages 23 – 38 form part of these financial statements.

All of the Charity's operations are classed as continuing.

A fully detailed Statement of Financial Activities for the year ended 31 March 2020 is shown at note 13.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

BALANCE SHEET AS AT 31 MARCH 2021

	Note	2021	2020
		£	£
CURRENT ASSETS			
Stock		5,529	9,162
Debtors	5	4,036	45,413
Cash in bank and in hand		309,498	83,958
		319,063	138,533
LIABILITIES: Amount falling due within one year			
Creditors and accruals	6	(27,296)	(36,341)
NET CURRENT ASSETS			
		291,767	102,192
TOTAL ASSETS LESS CURRENT LIABILITIES			
	10	291,767	102,192

REPRESENTED BY:

FUNDS

Unrestricted	8	97,547	45,169
Designated – building fund	8	165,000	45,000
Restricted	9	29,220	12,023
	10	291,767	102,192

The financial statements were approved by the Trustees on ^{20/09/2021}..... and signed on its behalf by:



.....
J Haywood - Hon Secretary



.....
M Fawcett - Chairman

**YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO
STATEMENT OF CASHFLOWS AS AT 31 MARCH 2021**

	Note	2021	2020
		£	£
Net cash provided by:			
Operating activities		224,843	(67,479)

Cash flows from investing activities:

Interest from investments		697	374
Net cash provided by investing activities		697	374

Change in cash and cash equivalents in the year		225,540	(67,105)
Cash and cash equivalents at the start of the year		83,958	151,063
Cash and cash equivalents at the end of the year		309,498	83,958

Reconciliation of net income to net cashflows from operating activities:

	2021	2020
	£	£
Net income for the year:	189,575	(38,185)

Adjustments for:

Interest from investments	(697)	(374)
(Increase)/decrease in stock	3,633	(302)
(Increase)/decrease in debtors	41,377	(45,011)
(Decrease)/increase in creditors	(9,045)	16,393

Net cash provided by/(used in) operating activities	224,843	(67,479)
-----------------------------------------------------	---------	----------

Analysis of changes in net funds	At 31 March 2020	Cash flow	At 31 March 2021
	£	£	£
Cash at bank and in hand	83,958	225,540	309,498

There was no net debt in the current or prior year.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

1. Accounting Policies

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

Charity Information

York Blind & Partially Sighted Society is registered as a Charitable Incorporated Organisation under the Charities Act 2011. The address for general enquiries is York Blind and Partially Sighted Society, 14 Merchants Place, Merchantgate, York, YO1

Accounting Convention

The financial statements have been prepared on a going concern basis in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2015) ("Charities SORP (FRS102)"), the Financial Reporting Standard applicable in the UK and Ireland ("FRS 102"), and the Charities Act 2011.

The financial statements are prepared in sterling which is the functional currency of the charity.

York Blind & Partially Sighted Society meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at cost or transaction value unless otherwise stated in the relevant accounting policy notes.

Going Concern

The Trustees have considered the wider economy and COVID-19. At the time of approving the financial statements, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

Income

Income is recognised in full in the Statement of Financial Activities ("SoFA") in the year in which it is receivable. For subscriptions and rental income this is in the year in which it is receivable and for ticket sales and meeting suppers this is in the year in which the event occurs. Deferred income represents grants received specifically for future accounting periods.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

1. Accounting Policies (Cont.)

Expenditure

Expenditure is included in the SoFA on an accrual's basis inclusive of any VAT that cannot be recovered and has been classified under headings that aggregate all costs related to the category.

All direct costs have been allocated across the functional categories of resources expended in the SoFA. Where costs cannot be directly attributed to headings, they have been apportioned on a basis consistent with the use of the resources.

The costs of generating funds relate to expenditure directly attributable to fundraising.

Costs of charitable activities include those costs incurred by the Charity in the delivery of its activities and services. Costs relating to an activity are allocated directly.

Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources.

Pensions

The Charity operates a defined contribution scheme for employees. Contributions are charged as an expense to the SoFA in the period in which they fall due.

Staff costs

The costs of short-term employee benefits are recognised as a liability and an expense where settlement of obligations does not fall within the same period.

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Operating lease agreements

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lessor are charged against income on a straight-line basis over the period of the lease.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

1. Accounting Policies (Cont.)

Tangible fixed assets and depreciation

Tangible fixed assets costing more than £2,000 are capitalised at cost.

Depreciation is calculated to write off the cost of fixed assets over their expected useful lives. The rates and methods used are as follows:

Equipment - 33% straight line

Computer - 33% straight line.

Stock

Stock is valued at the lower of cost and net realisable value.

Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

The Charity has only financial assets and liabilities of a kind that qualify as basic financial instruments in accordance with section 11 of FRS 102. Basic financial instruments are initially recognised at transaction value and are subsequently measured at their settlement value.

Cash at bank and in hand

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity held for working capital.

Debtors

Other debtors are recognised at the settlement amount due. Prepayments are valued at the amount prepaid.

Financial assets, other than those held at fair value through profit and loss, are assessed for indicators of impairment at each reporting end date.

Financial assets are impaired where there is objective evidence that, as a result of one or more events that occurred after the initial recognition of the financial asset, the estimated future cash flows have been affected. The impairment loss is recognised in the income and expenditure account.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

1. Accounting Policies (Cont.)

Creditors, loans and provisions

Creditors, loans and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors, loans and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Financial Liabilities

Financial liabilities are only derecognised when, and only when, the Charity's obligations are discharged, cancelled or they expire.

Amounts recognised as provisions are best estimates of the consideration required to settle the present obligation at the reporting end date, taking into account the risks and uncertainties surrounding the obligation.

Fund accounting

Unrestricted funds are funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity.

Designated funds are funds set aside by the Trustees out of unrestricted general funds for specific future purposes.

Restricted funds are funds which can be used only for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor.

Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

1. Accounting Policies (Cont.)

Critical accounting estimates and judgements (Cont.)

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

The Trustees are of the opinion that there are no estimates and assumptions which have a material impact on the carrying amounts of assets and liabilities.

2. INCOME

As at 31 March 2021	Unrestricted Funds	Restricted Funds	2021 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	11,937	11,937
Lottery Project	-	89,401	89,401
Other	2,500		2,500
Grant support	2,500	101,338	103,838
Donations	138,528	5,000	143,528
Legacies	251,404	-	251,404
Donations and legacies	389,932	5,000	394,932
Total donations, grants and legacies	392,432	106,338	498,770

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

2. INCOME (Cont.)

As at 31 March 2021 Continued	Unrestricted Funds £	Restricted Funds £	2021 Total Funds £
Other trading activities:			
Community fundraising	2,194	-	2,194
Income from work	2,540	-	2,540
Total trading activities	4,734	-	4,734
Investment income			
Bank interest	697	-	697
Income from charitable activities:			
Hospital Eye Clinic Service			
Vale of York CCG	-	24,975	24,975
York Hospital	-	11,141	11,141
Sales of equipment and aids	6,430	-	6,430
Social and group activities	75	-	75
Coronavirus Job Retention Scheme	9,590	-	9,590
Sundry income	-	5,000	5,000
Total income from charitable activities	16,095	41,116	57,211
Total income	413,958	147,454	561,412

During the year donations of £1,123 (2020: £1,310) were received from Trustees of the Society.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

2. INCOME (Cont.)

As at 31 March 2020	Unrestricted Funds £	Restricted Funds £	2020 Total Funds £
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	11,773	-	11,773
Lottery Project		87,539	87,539
Other	1,000		1,000
Grant support	12,773	87,539	100,312
Donations and gift aid	119,235		119,235
Legacies	56,187	-	56,187
Donations and legacies	175,422		175,422
Total donations, grants and legacies	188,195	87,539	275,734
Other trading activities:			
Community fundraising	9,422	-	9,422
Income from work	5,179	-	5,179
Total trading activities	14,601	-	14,601
Investment income			
Bank interest	374	-	374

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED MARCH 2021

2. INCOME (Cont.)

	Unrestricted Funds	Restricted Funds	2020 Total Funds
	£	£	£
Income from charitable activities:			
Vale of York CCG	-	21,722	21,722
RNIB "being there"	-	19,722	19,722
York Hospital	-	10,988	10,988
Department of Work and Pensions Access to Work	804	-	804
Sales of equipment and aids	13,502	-	13,502
Social and group activities	2,772	-	2,772
Room hires	2,517	-	2,517
Sundry income	3,583	-	3,583
Total income from charitable activities	23,178	52,432	75,610
Total income	226,348	139,971	366,319

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

3. EXPENDITURE

As at 31 March 2021	Unrestricted Funds	Restricted Funds	2021 Total Funds
	£	£	£
Salaries (Note 4)	16,048	-	16,048
Other	1,341	-	1,341
Total expenditure on raising funds	17,389	-	17,389
Expenditure on charitable activities			
Salaries (Note 4)	105,546	127,394	232,940
Rent, rates and service charges	50,497	11,890	62,387
Cost of equipment sold	11,437	-	11,437
Professional fees	6,926	-	6,926
Outreach premises	-	6,000	6,000
Lottery funding: overheads	6,233	-	6,233
Printed material	3,316	-	3,316
Lottery funding: equipment	-	2,747	2,747
Staff It	2,245	-	2,245
Insurance	2,103	-	2,103
Consultancy	1,917	-	1,917
Maintenance	1,798	-	1,798
Stationery and photocopying	1,788	-	1,788
Sundry expenses	1,720	-	1,720
Postage	-	1,114	1,114
CRMS	998	-	998
Bank charges	-	972	972
Newsletter	917	-	917
Phone	870	-	870
All aboard planning	704	-	704
IE fees paid to Independent Examiner	1,000	-	1,000
Other costs	4,176	140	4,316
Total expenditure on charitable activities	204,191	150,257	354,448
Total expenditure	221,580	150,257	371,837

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

3. EXPENDITURE (Cont.)

As at 31 March 2020	Unrestricted Funds	Restricted Funds	2020 Total Funds
	£	£	£
Salaries (Note 4)	40,836	-	40,836
Other	1,851	-	1,851
Total expenditure on raising funds	42,687	-	42,687

Expenditure on charitable activities

Salaries (Note 4)	108,084	113,229	221,313
Rent , rates and service charges	39,684	9,605	49,289
Relocation of offices	18,516	-	18,516
Cost of equipment sold	14,711	-	14,711
Professional fees	8,795	-	8,795
IT costs	2,708	5,958	8,666
Social and group activities	5,613	-	5,613
Volunteer expenses	3,677	-	3,677
Telephone	3,304	-	3,304
Tools, equipment and repairs	3,078	-	3,078
Stationery, printing and postage	4,996	2,613	7,609
Newsletter and publications	2,408	-	2,408
Insurance	2,970	-	2,970
Tutors	1,295	-	1,295
General expenses	807	963	1,770
Bank charges	948	-	948
Training and conferences	930	476	1,406
Advertising	780	-	780
AGM costs	651	-	651
IE fees paid to Independent Examiner	1,000	-	1,000
Other costs	3,077	941	4,018
Total expenditure on charitable activities	228,032	133,785	361,817
Total expenditure	270,719	133,785	404,504

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

4. STAFF COSTS

	2021 £	2020 £
Total staff costs comprise:		
Gross salaries	229,048	238,435
Employer's national insurance	12,373	13,547
Pension contributions	6,536	9,166
Salary charges	1,031	1,001
	248,988	262,149

Average number of employees (full time equivalents)	10.3	10.7
Average number of employees	13.9	14.4

No employee received remuneration more than £60,000 in the year (2020: no employee).

Key management personnel comprise 1 individual (2020: 1 individual) whose aggregate remuneration and benefits totalled £43,627 (2020: £42,647).

5. TRUSTEES AND RELATED PARTY TRANSACTIONS

No Trustee or any person connected with him or her received any remuneration, expenses or benefits during the year (2020: no Trustee).

No Trustee, or anyone connected with a Trustee, has a material interest in any of the Charity's transactions.

6. DEBTORS

	2021 £	2020 £
Trade debtors	1,015	66
Other debtors	3,021	45,347
	4,036	45,413

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

7. CREDITORS

	2021	2020
	£	£
Trade creditors	5,565	13,527
Other creditors	21,731	22,814
	<hr/>	<hr/>
	27,296	36,341
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8. UNRESTRICTED FUNDS

As at 31 March 2021	Balance at Apr 2020 £	Income £	Expenditure £	Transfer £	Balance at Mar 2021 £
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Unrestricted funds

General funds	45,169	413,958	(221,580)	(140,000)	97,547
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Designated funds

Building fund	45,000	-	-	120,000	165,000
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	90,169	413,958	(221,580)	(20,000)	262,547

As at 31 March 2020	Balance at Apr 2019 £	Income £	Expenditure £	Transfer £	Balance at Mar 2020 £
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Unrestricted funds

General funds	64,540	226,348	(270,719)	25,000	45,169
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Designated funds

Building fund	70,000	-	-	(25,000)	45,000
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	134,540	226,348	(270,719)	-	90,169

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2021

8. UNRESTRICTED FUNDS (Cont.)

Designated Building Fund

The purpose of the Building Fund is to enable the Charity to acquire its own premises at some time in the future. The Trustees are aware of their liability in terms of the current and any future lease and feel it prudent that the Building Fund remains as a separate entity.

9. RESTRICTED FUNDS

As at 31 March 2021

	Balances at Apr 2020 £	Income £	Expenditure £	Transfer £	Balances at Mar 2021 £
Eye Clinic Services	3,324	58,053	(45,646)	10,000	25,731
Lottery Fund	8,699	89,401	(104,611)	10,000	3,489
Total	12,023	147,454	(150,257)	20,000	29,220

Eye Clinic Information and Support Services

These services provide practical and emotional support to patients with a diagnosis of permanent sight loss. They operate from within the Eye Clinic Outpatients Department at York and Scarborough Hospitals and other locations commutable from York. The staff members (Eye Clinic Liaison Officers) also work with Hospital staff on issues of service delivery for blind and partially sighted patients.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

9. RESTRICTED FUNDS (Cont.)

Lottery Fund

The Lottery Community Fund was originally conceived to support our members to access activities in their own communities, however, the pandemic meant this became impossible to facilitate. The Community Lottery Fund kindly agreed to divert the funding to the Keeping in Touch project and online activity groups, to ensure visually impaired people were supported and had regular telephone contact, and were still able to engage socially despite the lockdowns and social distancing made necessary by Covid-19.

As at 31 March 2020

	Balances at Apr 2019 £	Income £	Expenditure £	Transfer £	Balances at Mar 2020 £
Eye Clinic Services	5,837	52,432	(54,945)	-	3,324
Lottery Fund	-	87,539	(78,840)	-	8,699
Total	5,837	139,971	(133,785)	-	12,023

10. ANALYSIS OF NET ASSETS BETWEEN FUNDS

As at 31 March 2021	Restricted Funds £	Designated Funds £	Unrestricted Funds £	2021 Total Funds £
Current assets	29,220	165,000	124,843	319,063
Current liabilities	-	-	(27,296)	(27,296)
	29,220	165,000	97,547	291,767

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

10. ANALYSIS OF NET ASSETS BETWEEN FUNDS (Cont.)

As at 31 March 2020	Restricted Funds	Designated Funds	Unrestricted Funds	2021 Total Funds
	£	£	£	£
Current assets	12,023	45,000	81,510	138,533
Current liabilities	-	-	(36,341)	(36,341)
	12,023	45,000	45,169	102,192

11. LEASE COMMITMENTS

Total commitments under non-cancellable operating leases are as follows:

	Land and buildings	
	2021	2020
	£	£
Due within one year	49,875	49,875
Due between two and five years	228,000	228,000
Due over 5 Years	178,125	228,000
	456,000	505,875

12. Contingent Asset

At 31 March 2021, the charity had been notified of its entitlement to 1 (2020: none) residuary legacy with Probate granted, the value of which is uncertain due to either insufficient information being available or due to potential claims on the estate. At the date when the accounts were signed, no further information had been received and so this legacy has not been accrued in full.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED
31 MARCH 2021

13. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2020

	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2020 Total £
Income from:				
Donations and legacies	188,195	-	87,539	275,734
Other trading activities	14,601	-	-	14,601
Investment income	374	-	-	374
Income from charitable activities	23,178	-	52,432	75,610
Total income	226,348	-	139,971	366,319
Expenditure on:				
Expenditure on raising funds	42,687	-	-	42,687
Expenditure on charitable activities	228,032	-	133,785	361,817
Total expenditure	270,719	-	133,785	404,504
Net (expenditure)/income	(44,371)	-	6,186	(38,185)
Transfers between funds	25,000	(25,000)	-	-
Net Movement in funds	(19,371)	(25,000)	6,186	(38,185)
Balances at 1 April 2019	64,540	70,000	5,837	140,377
Balances At 31 March 2020	45,169	45,000	12,023	102,192