

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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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

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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”

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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.

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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).

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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
Expenditure on:						
Expenditure on raising funds	3	14,286	-	-	14,286	17,389
Expenditure on charitable activities	3	180,758	-	131,203	311,961	354,448
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.

**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.

**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 £
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
	216,622	248,988

Average number of employees	9.3	13.9
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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
	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
	31,642	27,296

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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	262,547	138,449	(195,044)	-	205,952
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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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	90,169	413,958	(221,580)	(20,000)	262,547
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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