

York & District LGBT Forum

Charitable Incorporated Organisation

Charity Number 1162234

Trustees' Annual Report & Financial Statements for the year ended 31st July 2023

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Charity accounts preparation &
independent examination service



York & District LGBT Forum

Charity number 1162234

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Trustees' Annual Report

From: August 2022

To: July 2023

Charities Full Name:

York & District LGBT Forum

Registered Charity Number:

1162234

Objectives and Activities

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

1. To promote equality and diversity for the public benefit by:

- The elimination of discrimination in relation to lesbian, gay, bisexual, trans, intersex, queer, questioning (LGBT) and allies and associates living within the city of York and its environs;
- Challenging homophobia, biphobia, transphobia, or any associated negative attitudes and behaviour within society;
- Working with partners and organisations, public and private, in developing initiatives that will enhance and safeguard LGBT people's lives, ensuring their inclusion in all aspects of life, and that their human rights are protected;

and by - Advancing education, raising awareness and promoting a culture based on equality and diversity.

2. To promote social inclusion for the public benefit by preventing lesbian, gay, bisexual, trans, intersex, queer, questioning people (LGBT) and allies and associates from being socially excluded from society on the grounds of sexual orientation and gender identity; and

3. To further any other purpose which is charitable according to the law of England and Wales for the public benefit as the trustees see fit from time to time.

The Forum actively promotes awareness and understanding of LGBT needs to enable full participation in society and works with many others to reduce the fear of crime and bullying. It also encourages greater participation in the prevention and detection of homophobic, transphobic and biphobic discrimination. In recent years the charity has focused on improving people's health and wellbeing and has numerous groups, workshops, and events.

You can request the constitution by contacting us via email: yorklgbtforum@gmail.com.

Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts

Resilience building

This year our focus has been becoming more resilient after the legacy of the pandemic and the subsequent lockdowns hit the team quite hard. We have instead decided to focus on our core activities:

- Coffee Socials
- Trans Workshops
- Free to be Me
- Interfaith work

The trustees consider that they have complied with their duties for the public benefit guidance published by the Charity Commission.

Trustees' Annual Report

Achievements and Performance

Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.

Community Outreach

Art Gallery Project

Our Art Gallery Project is ongoing. Although volunteer numbers have dropped we still have core group who are using the academic framework of queering to offer a new lens to artworks. Activities have included:

- Label writing
- Raising awareness of LGBTQ+ perspectives on art

This project is a long-term project and we are planning what we are going to undertake in year 3.

York Socials (York - Hannah)

We have rebranded the York Coffee Social to the York Social, this is to better reflect the group. The change of venue has been a huge success and we would like to thank the Travellers Trust for being so inviting. The York Socials are currently weekly on Wednesday each month. Our new venue is The York Travellers Trust and is packed full of historical features. Attendance has grown significantly averaging 25 – 30 people a week. Thankfully, we have plenty of space to welcome new members of the community.

In terms of the attendees, we have been reaching more vulnerable members of the community. Each month sees a variety of pre-existing Forum members, regular visitors and individuals who have not experienced the Forum's events before. We have seen an increase in email requests and we have started to support the participants remotely. This often consists of building confidence to attend and supporting those who did not feel ready to join the group. It is made clear that there is no commitment needed. Participants can come any time between 6:30pm and 8:30pm with no pressure to stay for the entire event.

Members have quoted that the socials are a gateway to other activities, that they welcome an alcohol-free event and that it is friendly. Many members expressed how they can be themselves in the group with no judgement. A suggestion this year is that we should continue to promote the York socials in physical spaces through booklets and physical postings as well as online.

Hannah our coffee social facilitator says: I truly love facilitating the York Coffee Social and look forward to what the next year will bring!

Coffee Socials (Northallerton - CJ)

The Northallerton Socials have remained steady since going back to an in-person meetings and have continued to grow through the year, attracting new members via our social media presence and word-of-mouth whilst retaining many of our existing members too. Average attendance is over 25 per month and we have seen an increase in local attendance from the towns and villages around Northallerton, although being on the East Coast rail-line, makes this group accessible to people outside the area too.

We meet in a private room at the front of the Golden Lion Hotel on the 2nd Monday of each month, 6pm – 8pm, where members can buy drinks, a meal, or just call in for a social chat in a safe LGBTQ+ space.

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Free to be Me

Free to be Me in Care training remains freely accessible on the Forum website.

Our new cast, with Neil Cutler and Martina Stuart now joining Ann Murray and Sue Lister, gave a very successful preview to the British Legion's Lister House Care Home in Ripon with feedback including:

- please don't ever change - you are all amazing people - sorry you've had struggles in life
- very moving and motivational!
- amazing training, so heartfelt and truly opened my eyes to why it's so important to spread the message so people can truly be themselves
- it was a wonderful afternoon and I learnt so much
- thought provoking with lots of information that is very helpful to me in my role at RBL Lister House, also in my everyday life
- thank you for sharing your life stories & experiences.

We have been invited back several times and are now planning a one-day Older LGBT Conference at Lister House with guest speakers from around the country. A presentation to St Leonard's Hospice met with warm appreciation and applause, and one member of staff commented: "Enthralling!" The Care Quality Commission is now asking about LGBT provision and care homes need training such as Free to be Me to be able to respond with confidence. We are ready for bookings with any care staff you may happen to know. Please spread the word! Email Sue.Lister@yorklgbtforum.org or phone Sue on 01904 488870.

Free to be Me in the Workplace. LGBT awareness training of a similar nature is being created by other members of the Forum. Please contact enquiry@yorklgbtforum.org for LGBT training in the workplace.

Opening the Closet Door on Dementia

This is our 1hr. training on dementia and how it impacts LGBT individuals. Neil Cutler shares how dementia affected his long-time partner and how they coped until his death. Sue Lister and Ann Murray tell the story of a lesbian in a care home (Paper Bag People) and provide the opportunity for staff to talk to her in order to gain her trust – will she feel able to "come out?"

To discuss possibilities, please contact Sue.Lister@yorklgbtforum.org

Neil continues to lead on LGBT matters as a Trustee of Dementia Forward, a charity supporting people living with dementia in York and North Yorkshire. He gives talks, advises on LGBT inclusion in future strategies and helps with displays and events. Thanks to Sally Hanby at Lister House, he is now an integral part of their induction process with new members of staff, making sure LGBT awareness is fully understood and practised.

We were asked to take part in the City of York Council Dementia Strategy:

Community & Hospital Crisis Support for those Living with Dementia

We shared extracts from Free to be Me in Care/Opening the Closet Door on Dementia, Real People Theatre's Dementia & Me, and the concerns of AWOC (ageing without children) on those living alone without any family support – what happens to them when they get dementia and can't cope any longer? Will only a crisis serve to precipitate action?

Awareness Training: Free to be Me in workplace

The trustees have been busy reimagining the Free to be Me in the workplace and this training will be available from September 2023.

Trustees' Annual Report

Communities of Identities**Older People**

AWOC York (ageing without children) is a partner organisation. Bear in mind that the majority of the LGBT community and millions in the straight community will age without children by choice, circumstance, infertility, estrangement, bereavement, disability or distance. Check the national charity for the full story: www.awoc.org.uk. AWOC York monthly hybrid meetings continue at Spark York. Speaker notes + follow up email/post with copious notes & resources go to over 220 awocs throughout the country. Weekly Zoom socials continue with around 8-10 attending each week to share news and views. Monthly speaker details with links to videos and slides can be found at www.awocyork.org.uk. The door is open – contact Sue for a chat at hello@awocyork.org.uk or 01904 488870.

AWOC York's event in the York 50+ Festival Oct. 22: AWOCs Unite! This was an online meeting where we heard from new and well-established AWOC groups around the country. We now have peer support groups in Middlesbrough, Leeds, York, Gloucestershire, Lincolnshire, Dorset, Hastings and East Kent and a national charity which provides group support and an overview of the issues at www.awoc.org.uk. If you feel like an awoc do get in touch with a group in your area, or perhaps get support in starting an awoc group yourself – they are so important and the more that are seeded in rural areas as well as towns and cities, the better the chances of a more positive future for us all.

AWOC York's event in York International Women's Week March 2023: HOME

A hybrid workshop at Spark York where 11 of us shared a fascinating diversity of memories of the homes we had lived in during childhood and adult life. The video is available on ListerInteractions (YouTube) with a link on the AWOC York website: www.awocyork.org.uk.

AWOC York stalls in Information Fairs are an excellent way of meeting people and discussing the issues surrounding ageing without children. We have displays in the quarterly YOPA (York Older People's Assembly) information fairs around the city and we always share the York LGBT Forum stand at Pride. If you can think of a gathering where an AWOC display or presentation would be beneficial, please do contact Sue.

So, don't feel cut off as you grow older or are alone. All awocs are welcome! Contact Sue at hello@awocyork.org.uk or through the website at www.awocyork.org.uk where you will find a list of speakers and topics – just let me know if you would like a Zoom link to our monthly meetings. NB Neil will again be hosting an online social on Christmas Day 11am – all welcome J

Interfaith**CJ**

This is mostly an online presence using Facebook, where we currently have 120 members, and includes representatives from varying faith and non-faith backgrounds who are supportive of each other. This includes several LGBTQ+ Christian, Pagan, Muslim, Jewish and Buddhist members.

The group promotes and supports LGBTQ+ faith-related matters but would benefit from additional support to become more proactive. The Northallerton Open Table, a LGBTQ+ Christian service and is actively supported through this group.

As we approach our new year at York LGBT Forum, we hope to take a more active part for Interfaith Week in November and also to build on the interfaith element during LGBT History Month in February, where this group first began.

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Trans

This year has been about building on the work from last year for the trans community at the Forum. Trans peer-support socials have continued and now take place twice a month, once online and once at Over The Rainbow Café (previously Lunar Café). Attendance has increased, especially at the open mic nights, these nights explore being trans through creative means, increasing mental wellbeing outcomes. The group has grown so much that a new venue maybe needed. Phil and Sophie have continued work as the Trans Coordinators

- Facilitating regular trans groups
- Supporting new volunteers, some of whom have volunteered across different projects
- Collaborating on future events and joint funding bids with GeneraTe.

We hope these collaborations will continue and allow us to support more members of the trans community over the next year!

International

Although we have not had a project that has focused on international issues we have integrated this within our members meetings. We have been concerned about some anti-LGBTQ+ legislation across

Trustees' Annual Report

Financial Review

Review of the charity's financial position at the end of the period

This year the Trustees wanted to focus on delivering core projects to a high quality. We have been able to secure funding for these groups and end the year in a good financial position. We also have started again to diversify our funding portfolio to include more fundraisers and delivering training.

Statement explaining the policy for holding reserves stating why they are held

Our reserve policy is set at 6 months operational costs incase of liquidation.

Amount of reserves held

£2,143

Structure, governance and management

Description of the charity's trusts

**Type of governing document
(e.g. trust deed, royal charter)**

Constitution

**How the charity is constituted
(e.g. unincorporated association,
CIO)**

CIO (with membership)

**Trustee selection methods
including details of any
constitutional provisions e.g.
election to post or name of
any person or body entitled to
appoint one or more trustees**

Open recruitment, interviews, appointed by trustees, probationary period of 3 months, members ratify trustees at AGM.

Trustees' Annual Report

Reference and administration details

Charity's full name York & District LGBT Forum

Other names the charity is known by n/a

Charity's principal address York LGBT Forum C/O York CVS
15 Priory Street
York
YO1 6ET

Names of the trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not whole year	Name of person entitled to appoint trustee
Ian Holdsworth	Chair		
Jake Furby			
Sue Lister			
Neil Cutler			
Emily Roach			
Nigel Wilson			
Annis Cordy			


Names and addresses of advisors

Type of advisor	Name	Address
Independent Examiner	Karen Wood ACMA	Outsource Accountancy & Independent Examinations Hiscox Building Peasholme Green, York YO1 7PR

Declaration

The trustees declare that they have approved the Trustees Annual Report and Accounts

Signed on behalf of the charity's trustees

Signature 

Full Name Jake Lawrence Alfred Furby

Position Trustees

Date 7/12/2023

York & District LGBT Forum

(Charity Number 1162234)

Independent examiner's report to the trustees of York & District LGBT Forum

I report on the accounts of: **York & District LGBT Forum**

For the year ended: **31st July 2023** Which are set out on pages 9 to 13

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 Charity'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

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.

Karen Wood (ACMA)
Outsource independent examination service
The Hiscox Building
Peasholme Green
York YO1 7PR

Date

York & District LGBT Forum

(Charity Number 1162234)

Receipts & Payments Accounts for the year ended 31st July 2023

	Unrestricted funds	Restricted funds	2023 Total	2022 Total
	£	£	£	£
Receipts				
Grants	-	22,630	22,630	41,710
Donations	3,120	159	3,279	4,054
Training & fee income	-	-	-	-
Fundraising & sundry income	-	-	-	52
Total receipts	3,120	22,789	25,909	45,816
Payments	£	£	£	£
Marketing (banners, leaflets etc)	140	196	336	70
Facilitation of activities	201	15,708	15,909	42,205
Independent examination fee	400	-	400	400
Administration & office costs	-	-	-	467
Insurance	717	-	717	354
Website	473	-	473	443
Stall & event costs	-	-	-	442
Volunteer travel & expenses	295	380	675	659
AGM & annual report costs	359	-	359	239
Room hire, venue & rent	1,173	1,842	3,015	2,935
Consultancy	50	475	525	26,083
Equipment & IT support	-	-	-	809
Professional fees	-	-	-	2,418
Grant management	450	-	450	1,350
Training	300	-	300	-
Funds returned	-	-	-	-
Total payments	4,558	18,601	23,159	78,874
Net of receipts/(payments)	(1,438)	4,188	2,750	(33,058)
Transfer between funds	(700)	700	-	-
Balance brought forward	4,281	12,936	17,217	50,275
Balance carried forward	2,143	17,824	19,967	17,217

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Statement of Assets and Liabilities at:

31st July 2023

	Unrestricted funds	Restricted funds	2023 Total funds	2022 Total funds
	£	£	£	£
Assets				
Cash at bank and in hand				
Current bank account	2,143	17,824	19,967	17,217
	2,143	17,824	19,967	17,217
	Unrestricted funds	Restricted funds	2023 Total Funds	2022 Total funds
	£	£	£	£
Liabilities				
Independent examination fee	400	-	400	400
	400	-	400	400

York & District LGBT Forum

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Notes to the Accounts for the year ended:

31st July 2023

1. Basis of preparation

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

2. Funds analysis

2.1 Restricted funds

Fund name	Purpose
Homeless project	Funds to help educate and raise awareness of what it is like to be homeless in organisations that support homeless people.
Northallerton socials	Monthly coffee social, funded by Hambleton District Council and Broadacres. 2 hours a month for facilitation.
Awards for all	Coffee socials (York and Northallerton) (payment for rent, facilitation freelance workers x 2 and project management)
Trans workshop	Funded by the tampon tax and is for facilitation and 1 to 1 support for trans and Non-Binary individuals. The trans workshop meets weekly.
Morrison's	Trans support (payment for rent, facilitation freelance workers x 2 and project management)
York Pride	History month (payment for rent, project coordination and printing off booklet)
Magic Little Grants	Trans support (payment for rent, facilitation freelance workers x 2 and project management)
Cost of Living Fund	Trans support (payment for rent, facilitation freelance workers x 2 and project management)
Comic Relief	Trans support (payment for rent, facilitation freelance workers x 2 and project management)
Belfry (Two Ridings)	Trans support (payment for rent, facilitation freelance workers x 2 and project management)
JRHT	Funding for system representative

2.2 Designated funds

Older LGBT	Free to be me in care . Money allocated for older LGBT projects
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York & District LGBT Forum

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2.3 Movement of major funds

	Balance b/fwd	Incoming resources	Resources expended	Trf between funds	Balance c/fwd
	£	£	£	£	£
Unrestricted funds					
General funds	4,281	2,978	4,558	(800)	1,901
Designated funds	-	142	-	100	242
	4,281	3,120	4,558	(700)	2,143
Restricted funds	£	£	£		£
Homeless project	1,494	-	-	-	1,494
Northallerton socials	352	159	310	-	201
Awards for All	-	8,360	1,201	-	7,159
Trans Workshop	15	-	-	(15)	-
Morrisons	-	6,970	-	-	6,970
York Pride	-	300	302	2	-
Magic Little grants	-	500	-	-	500
Cost of Living Fund	-	500	-	-	500
Comic Relief	4,495	5,000	10,029	534	-
Belfry (Two Ridings)	-	1,000	-	-	1,000
JRHT	6,580	-	6,759	179	-
	12,936	22,789	18,601	700	17,824
Total funds	17,217	25,909	23,159	-	19,967

Transfers between funds represent an overspend that has been made up from unrestricted funds or a slight underspend that has been agreed by the funder can be transferred to unrestricted funds.

York & District LGBT Forum

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Approval of accounts for the year ended

31st July 2023

The report and accounts were approved at a meeting
of the trustees held on

27/3/2024

Date

Signed for and on behalf of the trustees

A. Juby

Signature

Signature

Jane Forby

Name

Name

Chair

Position (e.g. Chair etc)

Position (e.g. Chair etc)

05/04/2024

Date

Date