

WETHERBY IN SUPPORT OF THE ELDERLY

England & Wales · Charity number 1163698

Details

Other names	WISE
Status	Registered
Legal form	CIO
Registered	2015-09-22
Register	View on the Charity Commission register

Contact

Address	Wetherby One Stop Centre 24 Westgate Wetherby LS22 6NL
Phone	01937588994
Email	trustee@w-ise.org.uk
Website	http://www.w-ise.org.uk

Activities

Objects: TO SUPPORT OLDER PEOPLE, AND THOSE WHO CARE FOR THEM, WHO LIVE IN THE WETHERBY AREA (WETHERBY, LINTON, BOSTON SPA, THORP ARCH, WALTON, CLIFFORD, BRAMHAM, EAST KESWICK, HAREWOOD, COLLINGHAM, BARDSEY, SCARCROFT AND THORNER) AND WHO ARE SOCIALLY ISOLATED, OR LIVING WITH CHRONIC AND OR DEGENERATIVE CONDITIONS, SO THAT THEY CAN RETAIN THEIR INDEPENDENCE AND CONTINUE TO LIVE ACTIVE LIVES WITHIN THEIR COMMUNITY.

Activities: WiSE's core services include befriending, information, and advice, grass cutting, a transport scheme, a memory cafe to support those living with dementia and their carers and regular social activities to reduce isolation and loneliness. The charity also runs the WiSE Owl cafe which is a highly popular community cafe based in Boston Spa.

Classification

- **How:** Provides Human Resources, Provides Services, Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Recreation, Other Charitable Purposes
- **Who:** Elderly/old People

Geography

- Leeds City

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£326,063	£343,551	-	-
2024-03-31	£318,945	£332,207	-	-
2023-03-31	£291,598	£284,632	-	-
2022-03-31	£320,799	£248,430	-	-
2021-03-31	£188,068	£162,638	-	-

Trustees

Name	Role	Appointed
Mark Storey	Chair	2018-06-15
Becky Farren		2024-08-01
Caren Rowe		2019-04-01
Hugh Roberts		2024-07-11
Manjit Curtis		2023-03-21
Michelle Atkinson		2021-07-12

WETHERBY IN SUPPORT OF THE ELDERLY

England & Wales - Charity number 1163698

Accounts

Annual Report and Accounts 2024-25

April 2025



Chair's Introduction:

As I write this introduction I do so with immense pride and gratitude.

Serving WiSE over the past few years has been one of the most rewarding chapters of my life. This charity, rooted in compassion and community, continues to be a lifeline for so many older people across Wetherby and its surrounding villages.

This year's report reflects not only the breadth of our services- from the ever-popular WiSE Owl Café to our expanding Memory Café provision- but also the depth of our impact. We've supported thousands of individuals through social events, transport schemes, befriending and practical help like grass cutting and information services. Behind every statistic lies a story of connection, dignity and care.

I am especially proud of how WiSE has adapted to meet growing demand, strengthened partnerships and remained steadfast in its mission despite financial and societal challenges. Our volunteers, staff and supporters are the heartbeat of this organisation. I thank each of them for their unwavering dedication.

WiSE is in a strong position- strategically focused, community-driven and ready for the future, always guided by the values that make it so special.

Mark Storey

Chair of Trustees.



Trustee's Report:

The trustees present their Annual Report together with the Financial Statement of the charity for the year 1 April 2024 to 31 March 2025.

The trustees confirm these documents comply with the current statutory requirements, the statutory requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) as amended for accounting periods commencing from 1 January 2016.



A message from our Chief Operating Officer:

It is with great pride that I reflect on another remarkable year for WiSE. As we close the chapter on 2024/25, I am continually inspired by the resilience, warmth and generosity that define our charity and the communities we serve.

This year, we've seen our services grow in both reach and impact. From the expansion of our Memory Café to the continued success of our Welcome Café and each and every one of our core services, every initiative has been driven by a simple but powerful goal: to support older people to live well, independently and with dignity. Our volunteers have contributed over 6,000 hours of their time and our events have brought joy and connection to thousands.

We've also taken important steps to secure our future. Our strategic priorities - focused on sustainability, partnerships and communication - are already bearing fruit. We've strengthened relationships with local health services, broadened our funding base and reached more people than ever through both digital and traditional media.

None of this would be possible without the dedication of our staff, trustees, volunteers and supporters.

As we look ahead, we remain committed to listening, learning and evolving - ensuring that WiSE continues to be a trusted friend to older people across Wetherby and beyond.

Mark Dobson
Chief Operating Officer



Strategic Report

Our strategy for 2025/26

Introduction

In the context of an aging population, the challenges and needs of older people become increasingly prominent. Our charity, dedicated to supporting older and vulnerable individuals in our communities, aims to address these needs comprehensively and compassionately. This strategy document outlines our vision, mission, values, partnerships, sustainability plans and communication strategies to ensure we effectively support our communities.

Vision



To create a compassionate community where older individuals are respected, supported and integrated, living independent lives with dignity, health and happiness.

Mission



To empower and support older and vulnerable people through innovative services, advocacy and engagement, ensuring they and their carers have access to the resources and opportunities needed to lead healthy and fulfilling lives.

Objectives



We exist to support older and vulnerable people and their carers in Wetherby and its surrounding villages.

We also aim to help people who are socially isolated or living with chronic and degenerative conditions- enabling them to stay independent and live active, fulfilling lives in the community for longer.

Values



Caring: showing empathy and understanding to the experiences of older people, acting with dignity, kindness and compassion.

Collaborative: working with communities to achieve our objectives, through teamwork, cooperation and consultation.

Committed: making a difference to the communities we serve, whilst acting with loyalty, diligence and dedication.

Reliable: we do what we say we're going to do and can be trusted to deliver on our objectives efficiently.

Inclusive: we ensure our services are accessible to all older people, regardless of their background or situation.

Conclusion

Our strategy aims to build a sustainable, impactful charity that makes a significant difference in the lives of older people in the communities we serve. By achieving our vision, mission and values - and by strategically engaging with partners, managing our resources and communicating effectively - we will foster a community that fully supports its people to live long and fulfilling lives.



The WiSE feedback survey

In August, we conducted our annual survey for local people to have their say on services for people in Wetherby and surrounding villages.

We're proud of the part we play in supporting older people, however we always want to learn more about the area and its needs, to help us make plans for how we are going to support local people in the future.

The first half of the survey aimed to find out more about what services existing WiSE friends use and the areas we could improve on. The second half of the survey was to determine the needs of the community outside of WiSE services.

The results of this consultation demonstrate that WiSE and its services remain very highly valued by those we serve.

Indeed, the number of people reporting that they access our services weekly is on the rise, thanks in large to the steady expansion of our work.

Whilst demand for dementia support remains strong, a drop in respondents citing this demand in the survey does suggest that the expansion of our memory café provision is making an impact.

The popularity of our social events programme has increased and this is something we will seek to maintain and, if possible, expand in the future.



Other matters of significance during the reporting period

We have had a strong year, delivering our goals across all our core services.

During the reporting period (1 April 2024 to 31 March 2025):

- We received over **165** new referrals to WiSE from friends, family members, retirement life wardens, health services / GP surgeries and more.
- Scheduled **10** different social events, hosting over **170** timetabled activities/groups, which included our regular favourites, Line Dancing, Knit, Natter, Craft and Chatter and Elderberries. We also launched a new favourite - Boston Social.
- We held these groups in **5** different venues, across Wetherby, and surrounding villages. The overall attendance at these events was more than **4,500** and not just older people – more than **1,600** friends of all ages visited our Welcome Café this year.
- We also held some additional one-off special events. **37** friends visited Yorkshire Wildlife Park, **43** cruised on the river Tees and **32** enjoyed a day at Wetherby Races.
- We arranged for more than **60** people to have their grass cut each month.
- We made **730** transport journeys, whereby our volunteers took older people to activities or social engagements and local health appointments that otherwise they may not have been able to attend.
- We ensured between **8** and **11** people received a weekly contact from a friendly caller or visitor.
- We handled **550** contacts via the Information & Advice service, completing 20 blue badge applications and 22 attendance allowance forms.

- There were **650** attendances at the WiSE Memory Café, which supports those living with dementia and their carers by providing an appropriate setting to focus on clients' wellbeing.
- At the end of the reporting period, we had **126** volunteers across our programmes providing us with more than **6,000** volunteering hours.
- We posted more than **600** Send a Smile cards helping to ease feelings of isolation and loneliness across Wetherby and surrounding villages.
- And finally we served more than **10,000** visitors to the WiSE Owl Café. That's a lot of cups of tea and pieces of cake!

In the winter months, we coordinated efforts to provide more than 200 winter warmer packs to older people at a time when heating bills remained astronomically high. The packs were funded by WiSE and Leeds Community Foundation and contained thermal mugs, clothing, blankets, hot drinks and other winter essentials.

Welcome Café and Memory Café – both a lifeline for many of our friends – celebrated their second birthdays. In fact, Welcome Café – where we work in partnership with our friends at Wetherby Town Hall has been continued thanks to the further renewal of our Household Support Funding from the government.

We also use this grant to allow us to support more local people by giving start-up grants to other community groups, such as churches and local parish councils. This has helped us forge excellent community partnerships which we always endeavour to be at the heart of.

Our Activities – An overview

We carry out a wide range of services and activities in line with our charitable objectives. The trustees consider these services and activities provide benefit to older people and their carers in our area.

Our activities and services are promoted in a variety of ways, including actively engaging with local parish councils and community groups. We produce a monthly activities sheet and What's On guide, which is distributed to hundreds of our friends.

Our in-house communication officer provides publicity material to the media in Wetherby and Leeds and we continue to advertise in parish magazines. We display information about our services at GP surgeries, local churches, Wetherby Town Hall, and the One Stop Centre. We also promote our events and activities on our website and social media platforms.

WiSE Owl Café

The café is based in Boston Spa Village Hall. It is still a popular event, acting as a regular meet up for many of our customers, be it for coffee and a chat, or lunch. The café has one staff member supported by a dedicated band of volunteer servers and bakers. It sources its food from local suppliers and volunteer bakers make the delicious cakes and scones. To meet demand, in October we added a new Friday opening in response to the growing range of customers pouring through our doors. The WiSE Owl café now opens on Tuesday to Thursday from 9am to 3pm, and on Fridays from 10am to 3pm.

The café is open for referrals only – both agency and personal. Local GPs and agencies in the area have learnt about our café and often refer. This has resulted in waiting lists to attend the café and so, to cope with demand, we added a third monthly session from January 2024.

The session costs £4 for both carer and person living with dementia inclusive and meets at The Church Rooms, Church Centre St James' in Wetherby every first, second and fourth Wednesday of the month. In this financial year, there were more than 650 attendances at Memory Café.

Line Dancing

Line dancing promotes balance, coordination and is an excellent cognitive exercise which is relevant for our target age groups. In June, our instructor, Julie retired and now we have a new instructor, Ami who is very popular with our friends.

Forget Me Not Café - NEW

In March, we launched 'Forget Me Not' café dedicated to dementia carers, in recognition of the respite they need.

The new respite sessions will take place every three months, thanks to additional funding from the McCarthy Stone Foundation, Grants United Way UK and the dedication of WiSE's army of volunteers. The additional sessions are designed to offer carers who attend our Memory Café a well-deserved break, knowing that their loved ones are in safe hands.

Knit, Natter, Craft & Chatter

Knit, Natter, Craft & Chatter is held every Thursday at Deepdale Community Centre. Every week there is a new craft theme. People are also invited to bring their own project. This group continues to grow in popularity and we have moved to the bigger room at the venue.

Welcome Cafe

Welcome Cafe supports people of all ages with the cost of living crisis and is now well established in the local area. It takes place weekly at Wetherby Town Hall and serves soup, sandwiches and cakes, plus hot and cold drinks.

WiSE Memory Café

Memory Café is now well established and considered a lifeline for those living with dementia and their carers. Sessions are facilitated by a trained staff member, alongside WiSE's volunteers. Support and advice is also offered to family carers to assist them in their day-to-day continuing and challenging caring role.

Elderberries (CEASED) and Silver Social

Elderberries was a monthly social gathering which took place at St Joseph's Church Hall. This was so popular resulting in the room available being too small. Silver Social was a bi-monthly event, but has now replaced Elderberries on a monthly basis with local musicians or entertainers at The Engine Shed, Wetherby.

Boston Social – NEW

Boston Social launched in February. This is a bi-monthly social event which is held at Boston Spa Village Hall and features local entertainers. It costs £5 to attend which includes refreshments.

WiSE Goes to...

In this financial year we enjoyed two day trips outside of Wetherby. The first was to Yorkshire Wildlife Park in Doncaster. The second was a boat cruise of the Tees with afternoon tea. Tickets for our day trips cost around £20 per person which includes coach travel (often subsidised thanks to community funding) and entrance to the event. Both trips sold out and were enjoyed by everyone who attended.

WiSE Goes to the Races

From time to time, we take our friends for an afternoon at Wetherby Racecourse at a subsidised rate of £5 per ticket. This is a popular event which always sells out.

WiSE Goes to the Movies

We have a good partnership with Wetherby Cinema and occasionally offer a film screening for 25 friends. This costs £5, which includes a hot drink and a cake.

Bingo - CEASED

Bingo took place between April and December. It was a monthly event which involved bingo, games and quizzes along with prizes for the winners at Wetherby Town Hall. Due to a shortfall in numbers we put this event on hold, but hope to bring this group back in the next financial year.

Ad hoc events and celebrations

From time-to-time, we host events to acknowledge national celebrations and to raise additional funds to enhance our key services. In this reporting period we held a large scale Christmas party with David John – a tribute to Sir Rod Stewart as entertainment, at The Engine Shed, Wetherby. The raffle at the event raised almost £1,000 which was put towards enhancing the charity's activities programme.

Partnerships

The trustees are particularly grateful to our community partners for all their support. All have helped us to meet our objectives and benefit older people and their carers in our area.

We are especially grateful for the support of Boston Spa Village Hall, which is home to our much-loved Wise Owl Café.

Other local partnerships include:

- St Joseph's Church
- The Methodist Church in Wetherby
- St James' Church, Wetherby
- The Engine Shed, Wetherby
- Bramham Village Hall
- Walton Village Hall
- Thorner Over 55's Club
- Churches Together
- Wetherby District Lions Club
- Wetherby Racecourse & Conference Centre
- Voluntary Action Leeds and Doing Good Leeds
- Local primary care team
- The local NHS
- Outer North East Community Committee
- Sainsbury's Wetherby
- Wetherby Sports Association
- Handpicked Wetherby
- The Wetherby Clinic
- LCAN Leeds Community Anchor Network
- The Oven Door
- Wetherby Cinema
- Wetherby Town Hall
- Eaden Wealth
- Warners Solicitors
- Wetherby and District Foodbank
- Councillor Harrington and Councillor Lamb.

We welcome local groups, whether small and informal or larger in size, to contact us through our Activities Coordinator via email on activities@w-ise.org.uk.



WiSE lifeline cafès celebrate 2nd birthdays

Two of our much loved café's celebrated their 2nd birthday this year.

Welcome Café was initially launched to support people of all ages as they battled the cost of living crisis. The café proved so successful that the short term initiative became a permanent fixture as part of Voluntary Action Leeds' award-winning 'Warm Spaces' scheme.

WiSE Chief Operating Officer Mark Dobson, said: "What started out as a short term initiative to help people through winter hardship proved to be a desperately needed social and economic lifeline to lots of people of all ages right here in Wetherby.

"Although WiSE is best known for its work with isolated, older people, we've always emphasised that the Welcome Café is open to absolutely anyone. You don't need to be over a certain age and you don't need a referral - we'll offer a warm welcome and something to eat to anyone who needs our support.

“

That's the ethos behind the Warm Spaces scheme and WiSE's extended work as a Local Community Anchor Network, supporting vulnerable groups of all ages.

”

Welcome Café opens on Tuesdays from 11.30am to 1.30pm at Wetherby Town Hall. Patrons make a donation of their choice in exchange for food and company in a warm and welcoming space.

The café is supported by organisations including The Oven Door, Sainsbury's and Wetherby & District Foodbank. From time-to-time, other local organisations attend the café to offer advice on how people can stay safe, warm and well.



WiSE's Memory Café which provides a safe supportive space for people living with dementia and their carers, also celebrated its second birthday this year.

WiSE Dementia Lead Emma Collier, said: "This is a really important milestone for the café, with local demand for dementia services only increasing.

“

We know the café is a lifeline to so many people - providing a few hours respite to carers- and enhancing the quality of life for those living with dementia.

“As we get to know attendees, we have been able to integrate some of them into other WiSE activities and events. This included involving them in an afternoon out at Wetherby Races in the VIP area. Our social group ‘Silver Social’ is another popular event.

”

Sessions are facilitated by trained staff alongside WiSE volunteers. Up to 40 people attend each event, incorporating arts and crafts, board games and musical entertainment in a relaxed and friendly atmosphere. Support is also offered to carers to help them in their challenging roles.

Memory Café meets three times a month on Wednesdays, 1.30pm to 3.30pm at The Church Rooms, Church Centre St James in Wetherby. Attendance at the cafe is referral only – through a Memory Support Worker, GP or via self-referral.

To help support carers, WiSE also launched the ‘Forget Me Not’ café in March following the success of its existing Memory Café.

The new respite sessions take place every three months and are designed to offer carers a well-deserved break, knowing that their loved ones are in safe hands.

Funding for the café has come from multiple sources, including the National Lottery Awards For All, McCarthy Stone Foundation and Grants United Way UK.





Information and Advice

This service provides information and advice to over 60s on a range of issues, including how to apply for allowances and benefits, help for those struggling with form filling, how to find trusted tradespeople or carers and signposting to appropriate support organisations and services such as Adult Social Care and Carers Leeds.

The Information & Advice officer works from our Wetherby office, and attends additional planned events throughout the year, for example the WiSE Memory Café at St James' Church Rooms.

From April 2024 to March 2025 there was 650 Information & Advice contacts between the I&A service and WiSE friends, family members, carers, and support organisations such as Linking Leeds.

These contacts resulted in signposts and referrals to appropriate organisations and sources of support,

including Department for Work & Pensions, Leeds City Council, Care and Repair, Carers Leeds and Leeds Directory.

Forty-eight contacts included intensive one-to-one support, including form filling, from benefits to parking bay requests.

The Information & Advice service also assisted with the completion of 20 blue parking badge applications and filled in 22 attendance allowance claim forms, using a telephone appointment service.

During the reporting period, there were 165 new referrals to WiSE, which came from NHS health services, friends, family and carers, Retirement Life wardens and Linking Leeds amongst others.



Information and Advice a case study – Mr and Mrs F

Elderly couple Mr and Mrs F are late 70s and early 90s, living in warden controlled accommodation.

The couple have failing health and care for each other, resulting in increased isolation and loss of access to community with further deterioration to health. They also experience financial hardship.

Mr and Mrs F experienced problems reapplying for their Blue Badges, and made contact with WiSE for help. Failing to renew their expired Badges at the Post Office, they contacted our Information and Advice service. We took action to assist them to re-apply, by completing two on line applications. Both are now able to go out together and with family, using their now renewed blue parking badges.

Mr and Mrs F have also received help with their attendance allowance (AA) applications to increase their household income, and have received 'Send a Smile' greeting cards throughout the year. Further support has also been provided to renew their driving licences. Their garden is maintained with regular grass cuts between spring and autumn as part of the WiSE Grass Cutting Scheme, with potential for additional support with winter gardening jobs too.

Mr F later called us to thank us and confirm his new badge had arrived.

Transport Scheme

The Transport Scheme provides a low cost door-to-door pick up and drop off service for people over 60 who are less mobile, don't drive, or struggle with public transport. The scheme has been running for seven and a half years and is greatly valued by our friends.

The service – which operates in Wetherby and surrounding areas – has a number of trusted volunteer drivers who will collect a service user and drive them to GP and local healthcare appointments, WiSE activities, or to meet up with friends.

Journeys are offered Monday to Friday 8am to 6pm and all bookings are made through our transport booking line. The service is more cost effective than taxis. It costs £2 per journey, plus 60 pence for every mile travelled, which is paid for at the destination. Drivers are able to accommodate fold-up rollators or walking sticks, but unfortunately can't take wheelchairs.

During the reporting period, 730 transport journeys have been completed, whereby the charity's volunteers drive older people to activities or social engagements they would otherwise not have been able to attend.



Transport volunteer – David

David says he's found solace and purpose in volunteering for the Transport Scheme since the death of his wife seven years ago. Over the years, David has developed close relationships with many of his passengers and fellow volunteers. He has also socialised with other WiSE volunteers at various events.

David said: "When my wife died in 2018, I wanted to do something useful to occupy my spare time and benefit the local community. I enjoy driving and had observed the scheme in operation when taking my wife to various WiSE social events during the latter stages of her life. I was impressed by how well-received and popular it was.

"We talk about many things during the journey, such as family matters, hobbies and interests, and local issues. Many of my passengers have previously owned cars and have now stopped driving for various reasons. Our shared experiences behind the wheel often give us something else to talk about.

“

Joining the transport scheme has given me a real sense of purpose, knowing that I am playing a part in helping WiSE run this much-valued and popular service. It has also been good for my mental health and a key factor in helping me overcome grief and get back to living a normal life.

”

"The WiSE transport scheme is unique and well-managed, and long may it continue."



Grass cutting

We deliver the Grass Cutting scheme in collaboration with the HM Wetherby Young Offenders Prison Service, using funds provided by BBC Children In Need.

This unique collaborative project has meant many local people have had access to affordable grass cutting. Once we identify older people in need of help, WYOI provide a trained horticulturist to supervise young offenders who have expressed an interest in developing horticultural skills. It has been fantastic for so many under privileged young people from the prison to be working in the community and learning new skills.

In the reporting period, 60 people have had their grass cut each month.

The gardeners have all been risk assessed for suitability to earn Release on Temporary License before they take part in the project. The aim is for them to use this work experience to go towards a relevant qualification, giving them a greater chance of future employment.



The scheme helps to improve relationships between young and older people and is greatly valued by those who use it. The scheme is only one of its kind in the country and was granted a 'Connecting Communities Award' for the impact it has made so far.

Unfortunately, in the next financial year, our funding provided by BBC Children in Need will be coming to an end due to a change in the BBC's policy. We will be working hard to fundraise internally to keep this much loved scheme going.

'Send a Smile' Scheme



The 'Send a Smile' scheme remains popular with the older community. The scheme was launched as a way of further extending the charity's work to reduce isolation and loneliness in older people.

It is also designed to build new and lasting two-way community relationships, including between organisations like care homes, craft groups and schools. It complements the existing Befriending Scheme for people who live alone and promotes positive intergenerational interactions by establishing partnerships with schools and colleges.

'Send a Smile' encourages people of all ages, from across the region and afar, to submit postcards, pictures or hand drawn cards to make an isolated, older person smile. Cards are sent to the WiSE offices where they are then distributed to our friends.

In this reporting period we have received almost 600 handmade cards – a high percentage of which were made by children. This year we appealed for Easter cards, Christmas cards and poppy cards to commemorate Remembrance Day.

Due to budget restrictions, in the next financial year, Send a Smile will be reduced to Christmas cards only.

“

Betty rang to say thank you for her send a smile card. She also wants to donate £10 towards stamps as she said it's a lovely idea.

”





Befriending



Our befriending service matches an isolated older or vulnerable person living alone with a volunteer who gives up their time to regularly provide friendly conversation and companionship.

Where possible, matches are made based on shared interests and both parties living in the same area. Once a befriending match has been made, each person is introduced in the company of one of our co-ordinators.

Our team of befrienders who come from all walks-of-life are asked to commit to a minimum of one hour per week.

This involves dropping in for a cup of tea and a chat or a telephone call. On average over the year, nine volunteers spent 312 hours visiting and 156 hours making friendly phone calls.

For an older person, regular social interaction helps to break their feeling of isolation and helps to make them feel a part of the community.

For the volunteer, the visits are often satisfying, enjoyable and an opportunity to meet someone new to hear about their stories and experiences.

Volunteering

We actively recruit volunteers over the age of 16 to assist in the delivery of our services. We work with Voluntary Action Leeds and Doing Good Leeds to advertise our volunteering roles, plus on our own social media channels and at times, in local businesses.

Volunteering is a worthwhile and enjoyable activity and there are a wide range of opportunities available with us. Our Volunteer Coordinator is based at our Wetherby offices and welcomes enquiries from people who want to support those in the local community. All volunteers undertake an induction and receive training appropriate to their role.

Volunteers are vital to our success. Without them, we could not continue to develop our services and programme of events. Their help in delivering our services, through roles such as activity helpers, befrienders, dementia supporters, drivers, fundraising and trusteeship means we can continue our vital work.

At the end of the reporting period, we had 126 volunteers across our programmes. The volunteers range from younger people to very senior adults. Our volunteer coordinator is working hard to improve our support through training, recognition and communication. We are also continuing to develop additional volunteering opportunities.

Volunteering – a case study – Megan

Megan, aged 25, regularly gives up her time to support WiSE services- including activities and befriending.

Megan said: "I work at NG Bailey, where we are provided with volunteer days, and it is our choice where we use this time. I chose to volunteer at the Memory Café as my grandmother used to attend one and loved it. It was the highlight of her week and allowed my grandad to have an enjoyable time as well with other carers.

“

My favourite thing about the Memory Café is when there is a live singer. It is wonderful to see everyone sing along and those who can will get up and dance. The happiness that the sessions bring is clear with the smiles on everyone's faces.

”

"Even if people living with dementia do not remember what happened, they will go away having those positive, happy feelings and know the way they feel after the session. The Memory Café also provides a wonderful opportunity for carers to have a break and a chance to have a conversation with others who are experiencing similar situations. I know the Memory Café makes a difference for those living with dementia and their carers as I know it really did for my grandparents and I am proud to be a part of that."





Fundraising

The majority of our voluntary income in the last financial year was raised through charitable trusts and foundations which supported our projects and services. A small amount of income came from local benefactors.

Under the Winter Warmth Programme, our Welcome Café received £34,675.00. Within that figure are two grants totalling £5,600 from Leeds Community Anchor Network (LCAN), £12,500 from the Household Support Fund (HSF), £14,500 from Voluntary Action Leeds (VAL) and £2,075 from Leeds Community Foundation (LCF) for Welcome Café. This also included monies for distribution to other local agencies.

LCF awarded £3,000 for Winter Warmth packs for distribution locally in 2024/5 to help keep people warm. Over time a total of 251 people were helped, 116 last reporting year and another 135 people this reporting year.

Voluntary Action Leeds also granted £1,750 for a listening exercise.

Letters sent to Charitable Trusts focusing on dementia have generated a total of £26,406 from nine separate funders for the WiSE Memory Café. Two of these donations were specifically to fund an extra Memory Café session to provide respite for carers to allow them some free time. These extra sessions were funded by two organisations, McCarthy Stone Foundation and United Way and were launched in March.

Also included in this total was a grant from Wetherby Town Council for two entertainment sessions at the Memory Café.

A change to the fundraising focus in late 2024 has generated £2,580 towards funds for the WiSE Grass Cutting Scheme.

Therefore an overall fundraising total of £63,661 in financial year 24/25 has been achieved which includes unsolicited donations totalling £2,230. One donation was from a local group, Bickerton Chatter and two other local donors.



Community Fundraising

Internally, we raised £4,222.24 from our own fundraising events, raffles, charity buckets and the sale of merchandise.

A total of £3201.68 was raised by community fundraisers via JustGiving.

Here are just four examples of our amazing community fundraisers this year:

Staff at The Wetherby Clinic named WiSE as their charity of the year and raised more than £600 taking part in the Yorkshire 3 Peaks Challenge along with baking, selling books and hosting a collection tin in their reception. Cara, director at The Wetherby Clinic, said: "We are so pleased to have raised such a strong amount of money during the 20 for 20 challenge. The work WiSE does is incredible – and we wanted the charity to know how much we appreciate the services it offers."

Keith, aged 90, hiked the length of Hadrian's Wall to raise more than £400 in aid of WiSE. The veteran completed the 85 mile coast-to-coast trek - which covers some of the most rugged terrain in the country - in just 10 days. Keith said: "It's only recently that I've heard of WiSE. I don't feel lonely and whilst I am happy living and walking on my own, I decided I should have more social activity. I started attending Welcome Café, Line Dancing and the music entertainment afternoons. I find the activities interesting and so, although I'd already booked the trek, I offered to turn it into a fundraising expedition to raise funds for WiSE."

One of our volunteers, Mal, took part in a half marathon raising more than £300 for WiSE. Mal said: "I think WiSE is such an amazing charity. Unfortunately I lost both my nana and grandma during Covid and seeing how isolated they had become in their last couple of years was heartbreaking. I really wish they'd had access to something similar. I really want to help prevent other elderly people from being lonely and isolated and volunteering helps me do that. It brings me joy to see older people get out and socialise. I also love hearing all the stories they have up their sleeves. There is nothing better than hearing what their lives were like 'back in the day!'

And our very own COO, Mark, took part in the Leeds 10k in June for the third year in a row, raising £700 for WiSE's dementia services.

Wetherby in Support of the Elderly Annual Report 2024/25



Governance Structure and Management

Our constitution

WiSE is a Charitable Incorporated Organisation (CIO). It is governed according to a Charity Commission Foundation Model Constitution (dated 22 September 2015) and is therefore detailed and fit for purpose and protects the continuation of the charity.

Our objective

The objectives of the CIO are all for the public benefit.

Chiefly, our aim is to support older people, and those who care for them, who live in the Wetherby area (Wetherby, Linton, Boston Spa, Thorp Arch, Walton, Clifford, Bramham, East Keswick, Harewood, Collingham, Bardsey, Scarcroft and Thorner) and who are socially isolated, or living with chronic or degenerative conditions. This is so that they can retain their independence and continue to live active lives within their community.

Public benefit

In planning our activities, the trustees consider the specific objectives of the charity, along with our vision, mission and values. We review our aims, objectives and activities annually. As part of that process, we consider the outputs of our activities, assess the benefit of those outputs on the lives of older people and develop future activities to make sure our work continues to deliver the most benefit against our charitable objects.

This report contains more information on the way our work has benefited older people over the last 12 months, measured against objectives set at the beginning of the year.

The trustees confirm they have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Activities

Every year, we see our organisation grow, both in terms of services we provide and the requests for help we receive. It is well-known that older people are living longer and need more support to enable them to live a comfortable and independent lifestyle and through our range of activities and services we aim to make this happen.

We want to place WiSE at the heart of its community. To do this effectively we continually monitor and evaluate the services and activities we provide to ensure they meet the needs of our friends and their carers. Our current provision includes:

- Information and Advice
- Transport Scheme
- Grass Cutting
- Befriending
- Send a Smile Scheme
- The WiSE Owl Café
- Welcome Café
- Memory Café
- Forget Me Not Café
- Line Dancing
- Knit, Natter, Craft & Chatter
- Silver Social
- Boston Social
- WiSE Goes to the Movies
- WiSE Goes to the Races
- WiSE Goes to... (day trips)

The schemes are co-ordinated by a team of staff, with a large amount of work carried out by our 126 volunteers. These volunteers work in many different roles in the community, support roles or directly with friends- not only making many of our schemes possible by giving their time freely, but also bringing a true community perspective to our work.

All our work supports the wellbeing of older people in Wetherby and surrounding area. This means we help people to stay safe, well and live independently in their community for as long as possible.

We are committed to collaborative working and this continued in 2024/25 with renewed partnerships with voluntary, statutory and private sector organisations, all of which were focused on promoting and supporting the welfare of older people living locally. Adopting a joint approach means we can keep our friends and their families as the focus of our attention when designing and delivering new services.

Governance and management

The overall management and control of the charity rests with the individual members of the board of trustees who give their time freely and receive no remuneration or other financial benefits. The charity's trustees meet in accordance with the constitution which requires the presence of at least two or, if greater, a third of its members to be quorate. The Board may appoint a chairperson and revoke such appointment at any time. All business is decided by a simple majority, each trustee having one vote. In the event of an equality of votes, the chairperson of the meeting has a second or casting vote. The trustees are responsible for decisions taken in relation to the strategic running of the charity, but the day-to-day running of the charity is delegated to staff.

Trustee committees

The trustees delegate responsibility for more detailed consideration of the charity's affairs to four sub groups, each including at least two places for trustee members, chaired by a trustee and reporting to the board of trustees. These subgroups are:

- Finance
- HR and Policies
- Strategy and Service Development
- Fundraising and Marketing

Recruitment and appointment of new trustees

The existing trustees are responsible for the recruitment of new trustees. The trustees undertake a skills audit, which identifies specific skills needed to enhance the existing board. In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO. In addition, individuals who apply to become trustees must demonstrate a personal or professional interest in the care and well-being of older people.

Every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of trustees. Trustees retiring at the end of their term are eligible for reappointment. A trustee who has served for three consecutive terms of three years may not be reappointed for a fourth consecutive term, but may be reappointed after an interval of at least one year.

There shall be a minimum of four trustees and a maximum of 10. At the end of the reporting period there were 6 trustees.

Following appointment, new trustees are introduced to their new roles and given a Trustee's Handbook, which covers all aspects of the role. This includes a copy of the Charity Commission's guide 'The Essential Trustee' and copies of the Charity's Governing Document, financial statements and a guide to the policies and procedures adopted by the charity. An induction checklist is included to ensure everything is covered and signed off. All Trustees are Disclosure & Barring Service (DBS) checked and references obtained.

Voluntary support

Whilst voluntary help is not assigned a value for the purposes of the financial statements, we benefit immensely from the services provided by our incredible volunteers.

During the reporting period, 126 volunteers completed more than 6,000 volunteer hours between them. This volunteer contribution supports all of our schemes as well as supporting functions and fundraising.

The trustees thank all our volunteers for their continued support. Without their time and skills, our impact would not be as significant as it is.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Strategic risk management is regularly overseen by the board of trustees. There is an overarching risk management policy which involves a regular review of key risks faced by the charity. It also sets up systems and procedures to address those potential risks and to minimise any impact the charity if the risks materialise. The risk register is reviewed annually.

The trustees also have policies in place addressing the main operational risk areas. The trustees consider the following to be the key risks facing the organisation:

- Similar to many charities, the main risks facing WiSE are financial, relating to the loss of contracts, a reduction in grant income or a reduction in public donations, thus impacting on income targets. Due to the reliance identified above, we need to take account of changing economic, policy and social conditions which may affect individual supporters, corporate donors and statutory and trust funders. These risks are managed proactively through the assessment of new opportunities and existing contracts, planned appeals and the continuous review of organisational costs. An appropriate level of funds will be maintained to help mitigate the main financial risks. Additionally, trustees monitor results quarterly and consider the long term impact of emerging trends. They also oversee compliance with fundraising regulation and ensure fundraising is carried out to high ethical standards. We are continuing to invest in income diversification projects to mitigate the risk where possible.

- We recognise the importance of safeguarding vulnerable people in all areas of our work. The charity has a safeguarding policy which applies to all staff and volunteers who have regular contact with older people. This policy is supported by safer recruitment practice and training programmes for staff and volunteers. Although we believe the operational procedures have strong safeguards embedded in them, it remains a key risk on our risk register.
- We recognise the risks associated with information security and the importance of protecting our IT systems from malicious attack and unauthorised access and misuse. Security measures are in place to protect from unauthorised access to IT systems and to test vulnerabilities in the network. We hold a limited amount of personal information about our service users. We have a Data Protection policy in place which ensures only authorised access to personal details and continues to enhance the security of the data in line with best practice.
- We deliver services where they are needed. In all situations the health and safety of our staff, service users and others working with us is a prime concern. A significant proportion of staff and volunteers are lone workers, making visits to a range of locations. The charity has appropriate policies, guidance and training, and any health and safety concerns are reported to the trustees at regular board meetings.

Fundraising

All our fundraising activities deliver on our fundraising promise. We proactively comply with all fundraising related legislation and marketing regulation. All of our fundraising activity has been led by staff and volunteers.

As part of our approach, policies and standards, we make sure we protect vulnerable people and other members of the public from inappropriate behaviour. We proactively train everyone involved in fundraising, with clear processes in place to monitor and manage every interaction. In the past year, we have not uncovered any failure by staff or volunteers to comply with these schemes and standards and we received no fundraising complaints in 2024/25.



Independent Examiners Report

Independent Examiner's Report to the Trustees

I report on the accounts of the Trust for the year ended 31 March 2025, which are set out on pages 2 to 7.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. The Charity is preparing accrued accounts and I am qualified to undertake the examination by being a qualified member of The Association of Chartered Certified Accountants.

It is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act;
- To follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5) of the 2011 Act; and
- To state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and the seeking of explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with s. 130 of the Charities Act 2011; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Act have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Martin Knaggs
G L Barker & Co LLP
Chartered Certified Accountants
49 Austhorpe Road
Cross Gates
Leeds
LS15 8BA

Signed 

Date: 30/09/2025

Statement of Financial Activities

	Note	Unrestricted Funds £	Restricted Funds £	Total 2025 £	Total 2024 £
Turnover					
Core funding		132,396		132,396	132,396
WISE Café		65,243		65,243	54,751
Hubs activities		19,396		19,396	13,584
CIN Gardening scheme grants		40,000		40,000	40,000
Dementia Café			26,916	26,916	20,480
Donations and grants		9,862		9,862	15,987
Household Support Fund		32,250		32,250	32,100
		<u>299,147</u>	<u>26,916</u>	<u>326,063</u>	<u>309,298</u>
Other income					
Employment allowance		5,000		5,000	5,000
Interest income		4,733		4,733	4,647
		<u>9,733</u>	<u>-</u>	<u>9,733</u>	<u>9,647</u>
Total Income		308,880	26,916	335,796	318,945
Expenditure					
Rent		3,233		3,233	4,850
Insurance		1,320		1,320	1,195
Wise Café expenditure		29,074		29,074	21,419
Dementia Café expenditure		-	15,758	15,758	11,405
Salaries		177,573		177,573	169,861
Social security		14,253		14,253	12,034
Pensions		3,728		3,728	3,304
Telephone and internet		1,797		1,797	2,414
Post printing and stationery		5,969		5,969	6,654
Advertising and marketing		904		904	2,787
Travelling		1,616		1,616	3,058
Hub activities expenditure		22,023		22,023	27,876
CIN gardening expenditure		43,775		43,775	40,120
Computer equipment and consumables		7,676		7,676	9,234
Subscriptions		478		478	451
Sundry expenses		1,443		1,443	2,443
Training		1,729		1,729	969
Accountancy fees		2,940		2,940	2,760
Bookkeeping		2,961		2,961	2,622
Legal & professional fees		3,231		3,231	2,701
Donations		2,070		2,070	4,050
		<u>327,793</u>	<u>15,758</u>	<u>343,551</u>	<u>332,207</u>
Profits before finance costs		(18,913)	11,158	(7,755)	(13,262)

Balance Sheet

	Note	Unrestricted Funds	Restricted Funds	Total 2025	Total 2024
Finance costs					
Bank charges		<u>583</u>	<u>-</u>	<u>583</u>	<u>659</u>
		583	-	583	659
Net Profit		<u>(19,496)</u>	<u>11,158</u>	<u>(8,338)</u>	<u>(13,921)</u>

The notes on pages 5 to 7 form part of these accounts.



Notes to the Accounts

	Notes	£	2025 £	£	2024 £
FIXED ASSETS					
Tangible fixed assets			-		-
Current Assets					
Debtors and prepayments	5	2,843		2,487	
Cash at bank and in hand		<u>350,886</u>		<u>355,476</u>	
		353,729		357,963	
Current Liabilities					
Creditors	6	<u>21,084</u>		<u>16,980</u>	
NET CURRENT ASSETS			<u>332,645</u>		<u>340,983</u>
NET ASSETS			<u>332,645</u>		<u>340,983</u>
FUNDS					
Restricted funds			106,036		94,878
Unrestricted funds			<u>226,609</u>		<u>246,105</u>
			<u>332,645</u>		<u>340,983</u>

Approved by the trustees on
and signed on their behalf by:



Mark Storey
Chair of the Trustees

Dated: 29/09/25

The notes on pages 5 to 7 form part of these accounts.

Notes to the Accounts



1. ACCOUNTING POLICIES

a. **Basis of preparation of accounts**

The accounts have been prepared under the historic cost convention and in accordance with applicable accounting standards and follow the recommendations in 'Accounting and Reporting by Charities' (SORP).

b. **Income**

Grants receivable are accounted for on receipt, unless the period to which they relate is specified by the funder, in which case they are applied to the appropriate accounting period and that part of the grant relating to a future accounting period is included in deferred income. Voluntary income and donations are accounted for as received by the charity.

c. **Resources expended**

Resources expended are recognised in the period in which they are incurred. Resources expended include attributable VAT which cannot be recovered.

d. **Unrestricted funds**

Unrestricted funds are donations and other incoming resources receivable or generated for the objects of the charity without further specified purpose and are available as general funds.

e. **Restricted funds**

Restricted funds are those funds which are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Notes to the Accounts

2. NET OUTGOING RESOURCES FOR THE YEAR

The net outgoing resources for the year are stated after charging:

	2025	2024
	£	£
Accountancy	2,205	2,070
Independent Examiner's fee	735	690

3. STAFF COSTS AND NUMBERS

Staff costs were as follows:-	2025	2024
	£	£
Wages and salaries	188,682	177,429
Social security costs	14,253	12,034
Pension contributions	<u>3,728</u>	<u>3,304</u>
	<u>206,663</u>	<u>192,767</u>

The average weekly number of employees during the year, was as follows:-

	2025	2024
Charitable work – activities for the elderly	11	11
Administration	<u>-</u>	<u>-</u>
	<u>11</u>	<u>11</u>

All staff members do their own administration.

4. TRUSTEES

No remuneration or expenses were paid to trustees in the year.

Notes to the Accounts

5. DEBTORS AND PREPAYMENTS

	2025	2024
	£	£
Prepayments	2,843	2,474
Other Debtors	-	13
	<u>2,843</u>	<u>2,487</u>

6. CREDITORS

	2025	2024
	£	£
Trade Creditors	5,955	9,844
Accruals	3,123	2,842
Social Security & Other Taxes	-	3,191
Pensions	1,317	1,103
Deferred income	10,000	-
Wise Café Tips	689	-
	<u>21,084</u>	<u>16,980</u>

7. ANALYSIS OF NET ASSETS BY FUND

	Unrestricted Funds	Restricted Funds	Total
	£	£	£
Current assets	247,693	106,036	353,729
Current liabilities	(21,084)	-	(21,084)
	<u>226,609</u>	<u>106,036</u>	<u>332,645</u>

8. MOVEMENTS IN FUNDS

	Balance 1 April 2024	Movement in Incoming	Resources Outgoing	Transferred (out) / in	Balance 31 March 2025
	£	£	£	£	£
Children in Need Gardening Scheme	-	-	-	-	-
Dementia Café	94,878	26,916	15,758	-	106,036
Restricted Funds	94,978	26,916	15,758	-	106,036
Unrestricted Funds	246,105	308,880	328,376	-	226,609
	<u>340,983</u>	<u>335,796</u>	<u>344,134</u>	<u>-</u>	<u>332,645</u>

9. INDEMNITY INSURANCE

Indemnity insurance has been purchased to protect the charity, trustees and officers from loss arising from the neglect or default of the trustees or officers.

Financial Review

During the period covered by this set of accounts, WiSE continues to operate both strongly and efficiently, from a financial perspective which reflected in the 2024-2025 Financial Statements.

BANK ACCOUNTS:

The Charity operated with two bank accounts.

CURRENT ACCOUNT:

This account is for the daily income and expenditure of the organisation.

Within this account are restricted funding, which is ring-fenced for specific projects.

All the funds within this account are to deliver services and activities, primarily for older residents, but also for the broader community based on a particular funding stream.

Each element of funding that sits within this account, is monitored and records are retained and updated on a monthly basis. This enables us to present a clear audit trail at any time and produce a correct set of accounts at our year end.

RESERVE ACCOUNT:

Funds in the Reserve Account held in a savings account with the Yorkshire Building Society. These reserves fulfil the Trustees responsibilities in ensuring that:

- * Monies received are to further the purpose and work of the Charity;
- * The Charity can meet its long-term debts and obligations; and
- * The Charity has reserves to enable it to fulfil its legal and statutory obligations if wound up.

The trustees review the reserve account on an annual basis to ensure that reserves held in this account is sufficient.

FUNDING RECEIVED:

The Charity's principal source of funding is from Leeds City Council Adult Care, BBC Children in Need, Government obtained Household Support Fund, and smaller one-off grants and donations.

Each funding stream is individually monitored, and income and expenditure recorded for presentation and inclusion in the year end accounts.

FUNDRAISING:

Fundraising is extremely important to our charity. We therefore thank every organisation and individual who has contributed to our funds during the past fiscal year.

Without that generosity, we would not be able to successfully achieve our objectives around supporting the elderly and vulnerable in our area.

Corporate information

Wetherby in Support of the Elderly (WiSE)
(A charitable incorporated organisation).

Principal address:

24 Westgate
Wetherby
LS22 6NL

Telephone 01937 588994

Website www.w-ise.org.uk

Registered charity number - 1163698

Trustees

The charity trustees are appointed as and when appropriate by the body of trustees in office. The trustees who served during the period and those currently in office are:

Mark Storey (Chair)

Caren Rowe (Treasurer)

John Wardley (to September 2024)

Norma Harrington (to September 2024)

Michelle Atkinson

Manjit Curtis

Hugh Douglas Roberts (from September 2024)

Rebecca Farren (from September 2024)

Chief Operating Officer

Mark Dobson

Independent Examiner

GL Barker & Associates,
47-49 Austhorpe Road,
Leeds,
LS15 8BA

Bankers

Barclays Bank Yorkshire Building Society - online

Thank You

The trustees would like to offer their thanks, again, to everybody who has supported the organisation either through volunteering, offering their valuable time and skills or through invaluable financial support.

We remain as committed as ever to supporting older people in Wetherby and our surrounding communities.

Thank you!



© Wetherby in Support of the Elderly 2025.

The copyright of all material appearing in this publication belongs to Wetherby in Support of the Elderly, it may not be reproduced, duplicated or copied by any means without our prior written consent.

CIO Registration No. 1163698

WETHERBY IN SUPPORT OF THE ELDERLY

England & Wales - Charity number 1163698

Accounts

Annual Report and Accounts 2023-24

April 2024



Wetherby in Support of the Elderly Annual Report 2023/24

WiSE is a Charity Commission Registered Charitable Incorporated Organisation (CIO Foundation) No. 1163698.

Contents

3	Chair's Introduction
3	Trustee's Report
5	A Message From Our Chief Operating Officer
6	Strategic Report: Our strategy for 2024/25
7	Strategic Report: Strategic priorities for 2024 to 2027
8	Our 20th anniversary
9	The WiSE feedback survey
10	Other matters of significance during the reporting period
11-12	Our activities - An overview
13	Memory Café
14	Information and Advice
15	Transport Scheme and Grass Cutting
16	Send a Smile
17-18	Befriending
19	Volunteering
20	Fundraising
21-23	Governance Structure and Management
24	Independent Examiners Report
25	Statement of Financial Activities
26	Balance Sheet
27-30	Notes to the Accounts
31	Financial Review
32	Corporate Information

Chair's Introduction:

I am proud to introduce the WiSE Annual Report for 2023/24.

The last 12 months have been challenging both for charities and the people they exist to serve.

Yet WiSE continues to thrive.

From a sound financial footing, the charity has continued to extend the range and reach of the services it offers. Whilst annual reports such as this one are important for governance and scrutiny, some of the case studies listed illustrate the real, human impact of what the charity does.

These are the stories which make my fellow trustees and I incredibly proud of all that the charity and its fantastic team of volunteers deliver for local people.

Mark Storey
Chair of Trustees.



Trustee's Report:

The trustees present their Annual Report together with the Financial Statement of the charity for the year 1 April 2023 to 31 March 2024.

The trustees confirm these documents comply with the current statutory requirements, the statutory requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) as amended for accounting periods commencing from 1 January 2016.



A message from our Chief Operating Officer:

Our twentieth year has been a big one for the charity- as the narrative in this report illustrates.

We've delivered thousands of interventions- all designed to enhance the lives of older people living in Wetherby and its surrounding villages.

We've also marked our anniversary year in style, including a major celebration event and a time capsule burial.

But we have not stood still.

As well as looking back, we've made huge progress as a charity too- from opening a new memory café and extending the reach of our core services, to responding to a big consultation about the future of our work.

All of the accomplishments listed in these pages during the last 12 months are down to our small staff team and many volunteers. I thank all of them for what they have helped to us achieve.

Mark Dobson
Chief Operating Officer



Strategic Report

Our strategy for 2024/25

Introduction

In the context of an ageing population, the challenges and needs of older people become increasingly prominent. Our charity, dedicated to supporting older and vulnerable individuals in our communities, aims to address these needs comprehensively and compassionately. This strategy document outlines our vision, mission, values, partnerships, sustainability plans, and communication strategies to ensure we effectively support our communities.

Vision



To create a compassionate community where older individuals are respected, supported, and integrated, living independent lives with dignity, health, and happiness.

Mission



To empower and support older and vulnerable people through innovative services, advocacy and engagement, ensuring they and their carers have access to the resources and opportunities needed to lead healthy and fulfilling lives.

Objectives



We exist to support older and vulnerable people and their carers in Wetherby and its surrounding villages.

We also aim to help people who are socially isolated or living with chronic and degenerative conditions - enabling them to stay independent and live active, fulfilling lives in the community for longer.

Values



Caring: showing empathy and understanding to the experiences of older people, acting with dignity, kindness and compassion.

Collaborative: working with communities to achieve our objectives, through teamwork, cooperation and consultation.

Committed: making a difference to the communities we serve, whilst acting with loyalty, diligence and dedication.

Reliable: we do what we say we're going to do and can be trusted to deliver on our objectives efficiently.

Inclusive: we ensure our services are accessible to all older people, regardless of their background or situation.



Strategic Report

Strategic priorities for 2024 to 2027

Partnerships

To achieve our vision and mission, we know we must identify and work with partners who add value to the delivery of our core services. Therefore:

- By September 2024, we will reach out to all GP practices in our district to increase appropriate social prescribing referrals by 100%.
- By March 2025, we will complete a stakeholder mapping exercise across our core areas, identifying changes to demographics, community assets and partners.
- By March 2026, we will identify appropriate opportunities to lead collaborative partnerships we will evidence where this has been achieved.

Sustainability

To continue delivering on our objectives, it's important for the charity to remain fit for the future and responsive to change. Therefore:

- By September 2024, we will have reviewed our ICT system and made recommendations for improvement, taking into account the requirements of our funding strategy.
- By October 2024, we will have developed a three year funding strategy, comprising a range of funding sources to support our work.
- By March 2025, we will have reviewed staffing, evaluated staff rewards and made recommendations for future growth.
- By September 2025, we will have recruited two new trustees based upon insight gathered from a robust skills audit and gap analysis.

Communication

We will raise our profile using a range of communication channels. This will include:

- Growing our audiences to ensure more people know about our work and services- we aim to increase our social media followers by 25% on all platforms by the end of the 2025 fiscal year.
- Engaging our audiences through original, entertaining and educational content tailored to their interests and the values of the charity- we aim to do this by reaching at least 60,000 people through social media alone.

- Developing successful two-way communication channels, using our digital and non-digital platforms to 'listen' as well as 'speak'- we aim to continue to respond to every comment and message received within 24 hours.
- Working with non-digital media to further raise the profile of our work- we aim to distribute 40 press releases and achieve 100 pieces of traditional print media coverage, and 175 articles coverage in total by the end of the 2025 fiscal year.
- We will continue to develop our website as an information hub for our 'Friends' and volunteers - we aim to have 2,000 monthly page views to the website by the end of the 2025 fiscal year.

Development

We will develop our charity by carefully considering the needs of the people we serve and employ. This will include:

- Person centred care - we will place people at the centre of our care, using focus groups, surveys and other consultation methods to ensure our services are co-designed with the needs of our communities prioritised.
- Developing our people - we will enable our staff and volunteers to reach their full potential, through improved learning and development opportunities, a volunteer role description and a review of trustee skills.

Conclusion

Our strategy aims to build a sustainable, impactful charity that makes a significant difference in the lives of older people in the communities we serve. By achieving our vision, mission, and values, and by strategically engaging with partners, managing our resources and communicating effectively, we will foster a community that fully supports its people to live long and fulfilling lives.

Our 20th anniversary



In October 2023 we celebrated our 20th year supporting older people across Wetherby.

To mark the occasion we planted a time capsule containing artefacts, photographic memories, marketing materials and a letter from the Chief Operating Officer to offer future generations a window into the charity's past.

The capsule was planted in the centre of Wetherby at a location agreed by Wetherby Town Council and Leeds City Council. It includes charity marketing material, photographic memories and other artefacts.



We also welcomed a major West End star to our biggest musical bash to date. Michael Watson, aka Franki Valli performed songs from 'Jersey Boys' alongside fellow members of his The Four Seasons tribute act. The event was a sell out and not only celebrated the last 20 years of WiSE, but also raised funds to enhance our core services.

The WiSE feedback survey

In August, we conducted a survey for local people to have their say on services for people in Wetherby and surrounding villages.

We're proud of the part we play in supporting older people, however we always want to learn more about the area and its needs, to help us make plans for how we are going to support local people in the future.

The first half of the survey aimed to find out more about what services existing WiSE friends use and the areas we could improve on. The second half of the survey was to determine the needs of the community outside of WiSE services.

The results of this survey found that those who responded, access a wide range of our services and that these are well valued- despite respondents accessing support from other organisations in our area as well.

It is also apparent that people would like us to continue to expand upon the range of events and services we offer, based upon suggestions people put forward.

The stand out finding though was that people would like to see an expansion to the level of dementia support on offer- with a large majority of survey respondents commenting to this effect.

We have put plans to address this in next financial year – 2024-5.



Other matters of significance during the reporting period

We have had a strong year, delivering our goals across all our core services.

During the reporting period (1 April 2023 to 31 March 2024):

- We received over 230 new referrals to WiSE from friends, family members, retirement life wardens, health services / GP surgeries etc.
- Scheduled 11 different social events, hosting over **200** timetabled activities/groups, including our regular favourites, Line Dancing, Knit, Natter, Craft and Chatter and Elderberries. We also launched some 'new' favourites too, with our Silver Social.
- We held these groups in **8** different venues, across Wetherby, and surrounding villages. At these events, we welcomed over **4,500** people through our doors, and not just older people – 1,800 friends of all ages visited our Welcome Café this year.
- We also held some additional one-off special events; **170** friends danced along with The Jersey Boys, **140** joined in with Johnny Dee (Neil Diamond) at the Engine Shed, and **42** enjoyed a coach trip to Whitby.
- We arranged for **74** people to have their grass cut each month.
- We made **754** transport journeys, whereby our volunteers drive older people to activities or social engagements and local health appointments that otherwise they may not have been able to attend.
- We ensured **10** people received a weekly contact from a friendly caller or visitor.
- We handled **771** contacts via the Information & Advice service, completing 21 blue badge and 33 attendance allowance applications.
- **486** friends attended the WiSE Memory Café, which supports those living with dementia and their carers, by providing an appropriate setting to focus on clients' wellbeing.

- At the end of the reporting period, we had **126** volunteers across our programmes providing us with an invaluable amount of volunteering hours – more than **5,000** volunteering hours in fact!
- We posted more than **1,000** Send a Smile cards helping to ease feelings of isolation and loneliness across Wetherby and surrounding villages. We also sent an additional **636** birthday cards to friends and volunteers of WiSE.
- And finally we served more than **9,600** visitors to the WiSE Owl Café. That's a lot of cups of tea and pieces of cake!

In the winter months, we coordinated efforts to provide winter warmer packs to older people at a time when heating bills remained astronomically high.

The packs were funded by WiSE and Leeds Community Foundation and contained thermal mugs, clothing, blankets, hot drinks and other winter essentials. We distributed 116 packs to people in need, identified with the help of other community outreach organisations.

Our Household Support Funding from the government was renewed. This meant we have been able to continue running our donation based Welcome Café, which has been an enormous success working in partnership with our friends at Wetherby Town Hall. This is now part of our events timetable indefinitely.

We continue to use this grant to become micro commissioners- giving start-up grants to other community groups, such as churches and local parish councils. This has helped us support more local people and forge excellent community partnerships which we always endeavour to be at the heart of.

Our Activities – An overview

We carry out a wide range of services and activities in line with our charitable objectives. The trustees consider that these services and activities provide benefit to older people and their carers in our area.

Our activities and services are promoted in a variety of ways, including actively engaging with local parish councils and community groups. We produce a quarterly newsletter which is issued via e-mail, post or hand. We also produce a monthly activities sheet and What's On guide, which is distributed to hundreds of our friends.

Our in-house communication officer provides publicity material to the media in Wetherby and Leeds and we continue to advertise in parish magazines. We display information about our services at GP surgeries, local churches, Wetherby Town Hall, and the One Stop Centre. We also promote our events and activities on our website and social media platforms.

WiSE Owl Café

The café is based in Boston Spa Village Hall. It is still a popular event, acting as a regular meet up for many of our customers, be it for coffee and a chat, or lunch. The café has two part-time staff members supported by a dedicated band of volunteer servers and bakers. It sources its food from local suppliers and volunteer bakers make the delicious cakes and scones. At the end of the year, we wished a happy retirement to Christine, who started up the WiSE Owl Café 11 years ago. In 2024-5, we aim to expand the services of this café.

Line Dancing

Line dancing promotes balance, coordination and is an excellent cognitive exercise which is relevant for our target age. The session leader is very popular with our clients. They provide weekly online dances to keep our regulars in practise.

Elderberries

Elderberries is a monthly social gathering which takes place at St Joseph's Church Hall. All friends and carers are welcome to attend Elderberries, where professional musicians or local entertainers entertain them.

Knit, Natter, Craft & Chatter

Knit, Natter, Craft & Chatter is held every Thursday at Deepdale Community Centre. Every week there is a new craft theme. People are also invited to bring their own project.

Bingo

Bingo is a monthly event which involves bingo, games and quizzes along with prizes for the winners at Wetherby Town Hall.

WiSE Memory Café

Our Memory Café is hosted twice a month at St James' Church in Wetherby to support those living with dementia and their carers. More detailed information can be found later in this report.

Welcome Café

Formally Pay-As-You-Feel Café, Welcome Cafe was launched to support people of all ages with the cost of living crisis. It was made permanent from July 2023 as inflation and interest rates bring new hardship to all sections of the community. It takes place weekly at Wetherby Town Hall and serves soup, sandwiches and cakes, plus hot and cold drinks.

Walton Coffee Morning

At the start of the financial year, this event was held on a monthly basis at Walton Village Hall. This has now reduced to seasonal events, including Christmas and Easter. Everyone of all ages is welcome- not just the over 60s.

WiSE Goes to the Movies - NEW

WiSE teamed up with Wetherby Cinema to offer a monthly film screening for 25 friends. This costs £5 which includes a hot drink and a cake.

Silver Social – NEW

In November we launched Silver Social – a social event held bi-monthly. This is similar to Elderberries, with a local musician or entertainer, but at The Engine Shed.

WiSE Goes to the Races - NEW

From time to time, we take our friends for an afternoon at Wetherby Racecourse at a subsidised rate of £5 per ticket. This is a popular event which always sells out. Last year we also invited our friends to the 'WiSE Garden Gang', which was an opportunity for people to plant containers in the racecourse gardens. It was free to attend with no equipment needed, and lunch provided.

Move & Groove - CEASED

Move & Groove is a fun, informal dance class with an instructor from Funky Jives, who teaches everything from Salsa to Bollywood, Disco to Freestyle and anything in-between. Participants are invited stay for a drink and a chat afterwards. This event ceased in December 2023.

Tea Dance - CEASED

In April 2023 we launched a monthly tea dance which was a chance for our friends to dress up, socialise and dance to vintage music. This event was not as popular as anticipated, so ceased in October, with Silver Social replacing the time slot at The Engine Shed.

Ad hoc events and celebrations

From time-to-time, we host events to acknowledge national celebrations and to raise additional funds to enhance our key services. In this reporting period we celebrated the King's Coronation with a party, plus hosted fundraising events with tribute act The Glam n Glitz band plus a sell-out Christmas Party with Johnny Dee – the voice of Neil Diamond, both at The Engine Shed. As you've already read, we celebrated our 20th anniversary with The Jersey Rollers, and in September, and for the first time ever, we took our friends on a coach trip from Wetherby to Whitby. In addition, in March 2024, we hosted an Information and Wellbeing fair at Wetherby Town Hall, offering help and support with mental, physical and financial wellbeing to those who needed it.

Partnerships

The trustees are particularly grateful to our community partners for all their support. All have helped us to meet our objectives and benefit older people and their carers in our area.

We are especially grateful for the support of Boston Spa Village Hall, which is home to our much-loved Wise Owl Café.

Other local partnerships include:

- St Joseph's Church
- The Methodist Church in Wetherby
- St James' Church, Wetherby
- The Engine Shed, Wetherby
- Bramham Village Hall
- Walton Village Hall
- Thorner Over 55's Club
- Churches Together
- Wetherby District Lions Club
- Wetherby Racecourse & Conference Centre
- Voluntary Action Leeds and Doing Good Leeds
- Local primary care team
- The local NHS
- Outer North East Community Committee
- Wetherby Co-operative
- Morrison's Wetherby
- Sainsbury's Wetherby
- Wetherby Sports Association
- Handpicked Wetherby
- The Wetherby Clinic
- LCAN Leeds Community Anchor Network
- The Oven Door
- Wetherby Cinema
- Wetherby Town Hall
- Howard Civil Engineering
- Eden Wealth
- Warners Solicitors
- Councillor Harrington and Councillor Lamb.

We welcome local groups, whether small and informal or larger in size, to contact us through our Activities Coordinator via email on activities@w-ise.org.uk.



Memory Cafe

The WiSE Memory Café launched in January 2023 thanks to funding from multiple sources, including the National Lottery Awards For All and McCarthy Stone Foundation. Since then, it has gained popularity and is considered a lifeline for those living with dementia and their carers.

The café supports attendees by providing an appropriate setting to focus on clients' wellbeing, with sessions facilitated by a trained staff member, alongside WiSE's volunteers. Support and advice is also offered to family carers to assist them in their day-to-day continuing and challenging caring role.

The session costs £4 for both carer and person living with dementia inclusive and meets twice a month on Wednesdays, 1.30pm to 3.30pm at The Church Rooms, Church Centre St James' in Wetherby.

The café is open for referrals only – both agency and personal. Local GPs and agencies in the area have learnt about our café and often refer. As such, the demand for sessions has outweighed what current funding can allow. In the next financial year, we plan to put the money raised through fundraising into dementia services. We already plan to employ a new part-time member of staff and add another monthly session to reduce our waiting lists.

This year, 486 friends attended the WiSE Memory Café.

“

A HUGE thank you for allowing mum and dad to attend the Memory Café. They both absolutely loved it (as did I!). It had a huge effect on mum in the days following. Mum is pretty much non-verbal nowadays, but she was singing along to some of the songs and dad said she was still singing the next morning and she was so much more engaged with what was going on around her. The whole afternoon gave them a massive lift. We saw mum's sister on Thursday and despite mum's short-term memory being poor, I asked her to tell her where she had been the previous week. She said Wetherby and that there was a beautiful singer (mum was very taken with the dress). She also said she was going to the Christmas party! I was quite shocked that she remembered but clearly the emotional uplift and how it made her feel on the day has really stayed with her. It was joyous to see everyone having such a good time.

”



Information and Advice

This service provides information and advice to over 60s on a range of issues, including how to apply for allowances and benefits, help for those struggling with form filling, how to find trusted tradespeople or carers and signposting to appropriate support organisations and services such as Adult Social Care and Carers Leeds.

The Information & Advice officer works from our Wetherby office, and attends additional planned events throughout the year, for example the WiSE Memory Café at St James' Church Rooms.

From April 2023 to March 2024 there were 771 Information & Advice contacts between the I&A service and WiSE friends, family members, carers, and support organisations such as Linking Leeds.

These contacts resulted in more than 150 signposts and over 25 referrals to appropriate organisations and sources of support, including Department for Work & Pensions, Leeds City Council, Care and Repair, Carers Leeds and Leeds Directory.

More than 80 contacts included intensive one-to-one support, which included completion of over 80 forms, from bus passes to Council Tax discount applications.

The Information & Advice service assisted with the completion of 21 blue parking badge applications and filled in 33 attendance allowance claim forms, using a telephone appointment service.

During the reporting period, there were 232 new contacts/ referrals to WiSE, which came from NHS health services, friends, family and carers, Retirement Life wardens and Linking Leeds amongst others.

Information and Advice a case study – Mrs R

Mrs R, aged 96, first accessed help from WiSE November 2011 when she was helped to apply for her Blue Parking Badge. Mrs R has been in touch with WiSE over the years receiving Send a Smile cards and also receiving 11 Coronavirus wellbeing calls in 2020 during the lockdown. Mrs R contacted us again for help with a Blue Badge renewal on the same day as the WiSE Wellbeing Event was being held at Wetherby Town Hall. Mrs R was advised of the event and went along with the help of her regular carer who accompanied her, providing assistance to get to us using her wheelchair.

The Wellbeing event was running alongside our weekly Welcome Café upstairs in a specially hired room. Stands were manned by organisations including Wetherby PCSOs Wetherby Library, Milner's Law Group, the local Building Society and Linking Leeds. The WiSE Dementia Lead, Befriending Coordinator and the I&A officer also chatted to those at the café in the event room but also downstairs at the café tables. Although Mrs R was unable to climb the stairs, she was happy to have her photo taken and documents copied in the Welcome Space cafe downstairs so her request for help to renew her blue badge could be completed.

Mrs R later called us to thank us and confirm her new badge had arrived.

Transport Scheme

The Transport Scheme provides a low cost door-to-door pick up and drop off service for people over 60 who are less mobile, don't drive, or struggle with public transport. The scheme has been running for seven and a half years and is greatly valued by our friends.

The service – which operates in Wetherby and surrounding areas – has a number of trusted volunteer drivers who will collect a service user and drive them to GP and local healthcare appointments, WiSE activities, or to meet up with friends.

Journeys are offered Monday to Friday 8am to 6pm and all bookings are made through our transport booking line. The service is more cost effective than taxis. It costs £2 per journey, plus 60 pence for every mile travelled, which is paid for when the passenger arrives home. Drivers are able to accommodate fold-up rollators or walking sticks, but unfortunately can't take wheelchairs.

During the reporting period, 754 transport journeys have been completed, whereby the charity's volunteers drive older people to activities or social engagements they would otherwise not have been able to attend.

Grass Cutting

We deliver the Grass Cutting scheme in collaboration with the HM Wetherby Young Offenders Prison Service, using funds provided by BBC Children In Need.

This unique collaborative project has meant many local people have had access to cheap and affordable grass cutting. Once we identify older people in need of help, WYOl provide a trained horticulturist to supervise young offenders who have expressed an interest in developing horticultural skills. It has been fantastic for so many under privileged young people from the prison to be working in the community and learning new skills.

In the reporting period, 74 people have had their grass cut each month.

The gardeners have all been risk assessed for suitability to earn Release on Temporary License before they take part in the project. The aim is for them to use this work experience to go towards a relevant qualification, giving them a greater chance of future employment.

The scheme helps to improve relationships between young and older people and is greatly valued by those who use it. The scheme was only one of its kind in the country. It was granted a 'Connecting Communities Award' for the impact it has made so far.



‘Send a Smile’ Scheme

The ‘Send a Smile’ scheme is now an established service and still remains popular with the older community. The scheme was launched as a way of further extending the charity’s work to reduce isolation and loneliness in older people.

It is also designed to build new and lasting two-way community relationships, including between organisations like care homes, craft groups and schools. It complements the existing Befriending Scheme for people who live alone and promotes positive intergenerational interactions by establishing partnerships with schools and colleges.

‘Send a Smile’ encourages people of all ages, from across the region and afar, to submit postcards, pictures or hand drawn cards to make an isolated, older person smile. Cards are sent to the WiSE offices where they are then distributed to our friends.

In this reporting period we have received more than 1,000 handmade cards – a high percentage of which were made by children. This year we appealed for Easter cards, Christmas cards and poppy cards to commemorate Remembrance Day. We also launched a one-off children’s competition to design a King’s Coronation card.



“

Hope you had a lovely Christmas.
Will you please pass on my thanks to
Cerys and Poppy-May, Wetherby High
School, for my beautifully decorated
Christmas card, so kind of them and
much appreciated. Many thanks and
wishing you a Very Happy New Year

Best wishes Maureen

”



Befriending

Our befriending service matches an isolated older or vulnerable person living alone with a volunteer who gives up their time to regularly provide friendly conversation and companionship.

Where possible, matches are made based on shared interests and both parties living in the same area. Once a befriending match has been made, each person is introduced in the company of one of our co-ordinators.

We have a team of 10 befriending volunteers who come from all walks-of-life and are asked to commit to a minimum of one hour per week. This involves dropping in for a cup of tea and a chat.

In the last year, our volunteers made, on average, more than 360 befriending visits and 150 calls to our older friends.

For an older person, regular social interaction helps to break their feeling of isolation and helps to make them feel a part of the community.

For the volunteer, the visits are often satisfying, enjoyable and an opportunity to meet someone new to hear about their stories and experiences.

Befriending – a case study

Peter, aged 87, missed the company of his wife Christine when she sadly passed away several years ago. That prompted his granddaughter to contact WiSE about befriending.

Peter was then matched with WiSE volunteer Mike, aged 75.

Peter said:

“

When my wife of 57 years passed away, I wanted a bit more company. In my younger years I was very active but now I have limited mobility. Although I have lots of entertainment at home with the TV and I get a lot of enjoyment from my garden, it can get lonely sometimes, so I always look forward to seeing Mike. He's a good friend, a good pal – and thankfully he doesn't eat too many biscuits!

”

Mike said:

“

It's always a pleasure to see Peter – I consider him one of my good friends. We talk easily about our careers, families and holidays in the past. We always have something to talk about and we always have something to say. I find Peter very interesting. I've lived in Wetherby for a very long time and have seen it change over the years. He's really opened my eyes to the history of our town.

”



Volunteering

We actively recruit volunteers over the age of 16 to assist in the delivery of our services. We work with Voluntary Action Leeds and Doing Good Leeds to advertise our volunteering roles, plus on our own social media channels and at times, in local businesses.

Volunteering is a worthwhile and enjoyable activity and there are a wide range of opportunities available with us. Our Volunteer Co-ordinator is based at our Wetherby offices and welcomes enquiries from people who want to support those in the local community. All volunteers undertake an induction and receive training appropriate to their role.

Volunteers are vital to our success. Without them, we could not continue to develop our services and

programme of events. Their help in delivering our services, through roles such as activity helpers, befrienders, dementia supporters, drivers, fundraising and trusteeship means we can continue our vital work.

At the end of the reporting period, we had 126 volunteers across our programmes. The volunteers range from younger people to very senior adults. Our volunteer coordinator is working hard to improve our support through training, recognition and communication. We are also continuing to develop additional volunteering opportunities.

Volunteering – a case study

Beryl has volunteered for WiSE for more than 18 years.

She said: “I started my volunteering journey with WiSE around 18 years ago. Since the beginning, I have seen WiSE grow exponentially – there is a bigger variety of activities and the wider spread of geographical areas has given people more opportunities to get involved.

“Choosing my favourite activity is difficult as they are all varied, but I must admit that although the most physically demanding, the teamwork needed at the Welcome Café as we prepare and serve the food and drink is very rewarding.

“For me, volunteering is not all about giving. I have gained so much myself over the years, having made many friends with the volunteers and clients. Since being widowed, WiSE has also become a lifeline for me helping to fill an enormous gap in my life.

“

WiSE has changed the lives of so many people, giving them the opportunity to meet and talk to others in comfortable and safe surroundings. I am proud to be part of that ethos.

”



Fundraising

The majority of our voluntary income in the last financial year was raised through charitable trusts and foundations which supported our projects and services. A small amount of income came from local benefactors.

Under the Winter Warmth Programme, our Welcome Café received £36,805. Within that figure was a substantial grant of £25,250 from Leeds Community Anchor Network (LCAN), which included monies for distribution to other local agencies. Leeds Community Foundation awarded £3,000 for Winter Warmth packs for distribution locally, which helped 116 people to keep warm this winter.

Letters sent to Charitable Trusts have generated £2,000 for our activities programme.

Letters focusing on loneliness sent out to Charitable Trusts have generated £4,700.

A total of £20,930 from 11 separate funders was received for the WiSE Memory Café. One of these donations was from McCarthy Stone for the Memory Café Christmas Party and another donation from Marshall & Viggars, was specifically to pay for two Memory Café sessions.

Unsolicited donations totalled £3,200. Two were donations from Bardsey Parish Council, another was proceeds from a coffee and cake sale in Little Ribston and two other donations were from a local business and charity.

Internally, we raised £2,120.70 from our own fundraising events, raffles, charity buckets and the sale of merchandise. A total of £1,854.44 was raised by community fundraisers via JustGiving.

Fundraising – a case study

Isabelle, aged 24 completed a tandem skydive in April, raising a total of £815!

Isabelle said: “I started volunteering at the WiSE Owl Café as I wanted to do something positive with my spare time. I really connected with the idea of supporting WiSE as I had recently lost my grandparents who meant so much to me.

“

“I saw the effects that COVID had on their isolation and it broke my heart to know that later in their life they had to feel alone and isolated. I would never want any older person to feel that way within their community. I know they would have loved spending time at such lovely places like the WiSE Owl Café if they’d known about it when they were alive. I hope they would be proud of me supporting WiSE.

”

“I decided to fundraise to try to do something special. I’d always wondered about a skydive, but never found the willpower to force myself to do it. What better thing than raising money for WiSE.”



Governance Structure and Management

Our constitution

WiSE is a Charitable Incorporated Organisation (CIO). It is governed according to a Charity Commission Foundation Model Constitution (dated 22 September 2015) and is therefore detailed and fit for purpose and protects the continuation of the charity.

Our objective

The objectives of the CIO are all for the public benefit.

Chiefly, our aim is to support older people, and those who care for them, who live in the Wetherby area (Wetherby, Linton, Boston Spa, Thorp Arch, Walton, Clifford, Bramham, East Keswick, Harewood, Collingham, Bardsey, Scarcroft and Thorner) and who are socially isolated, or living with chronic or degenerative conditions. This is so that they can retain their independence and continue to live active lives within their community.

Public benefit

In planning our activities, the trustees consider the specific objectives of the charity, along with our vision, mission and values. We review our aims, objectives and activities annually. As part of that process, we consider the outputs of our activities, assess the benefit of those outputs on the lives of older people and develop future activities to make sure our work continues to deliver the most benefit against our charitable objects.

This report contains more information on the way our work has benefited older people over the last 12 months, measured against objectives set at the beginning of the year.

The trustees confirm they have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Activities

Every year, we see our organisation grow, both in terms of services we provide and the requests for help we receive. It is well-known that older people are living longer and need more support to enable them to live a comfortable and independent lifestyle and through our range of activities and services we aim to make this happen.

We want to place WiSE at the heart of its community. To do this effectively we continually monitor and evaluate the services and activities we provide to ensure they meet the needs of our friends and their carers. Our current provision includes:

- Befriending
- Information and Advice
- Transport Scheme
- Grass Cutting
- Send a Smile Scheme
- The WiSE Owl Café
- Welcome Café
- Memory Café
- Line Dancing
- Elderberries
- Silver Social
- WiSE Goes to the Movies
- WiSE Goes to the Races
- Knit, Natter, Craft & Chatter
- Bingo
- Walton Coffee Morning

The schemes are co-ordinated by a team of staff, with a large amount of work carried out by our 126 volunteers. These volunteers work in many different roles in the community, support roles or directly with friends - not only making many of our schemes possible by giving their time freely, but also bringing a true community perspective to our work.

All our work supports the wellbeing of older people in Wetherby and surrounding area. This means we help people to stay safe, well and live independently in their community for as long as possible.

We are committed to collaborative working and this continued in 2023/24 with renewed partnerships with voluntary, statutory and private sector organisations, all of which were focused on promoting and supporting the welfare of older people living locally. Adopting a joint approach means we can keep our friends and their families as the focus of our attention when designing and delivering new services.

Governance and management

The overall management and control of the charity rests with the individual members of the board of trustees who give their time freely and receive no remuneration or other financial benefits. The charity's trustees meet in accordance with the constitution which requires the presence of at least two or, if greater, a third of its members to be quorate. The Board may appoint a chairperson and revoke such appointment at any time. All business is decided by a simple majority, each trustee having one vote. In the event of an equality of votes, the chairperson of the meeting has a second or casting vote. The trustees are responsible for decisions taken in relation to the strategic running of the charity, but the day-to-day running of the charity is delegated to staff.

Trustee committees

The trustees delegate responsibility for more detailed consideration of the charity's affairs to four sub groups, each including at least two places for trustee members, chaired by a trustee and reporting to the board of trustees. These subgroups are:

- Finance
- HR and Policies
- Strategy and Service Development
- Fundraising and Marketing

Recruitment and appointment of new trustees

The existing trustees are responsible for the recruitment of new trustees. The trustees undertake a skills audit, which identifies specific skills needed to enhance the existing board. In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO. In addition, individuals who apply to become trustees must demonstrate a personal or professional interest in the care and well-being of older people.

Every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of trustees. Trustees retiring at the end of their term are eligible for reappointment. A trustee who has served for three consecutive terms of three years may not be reappointed for a fourth consecutive term, but may be reappointed after an interval of at least one year.

There shall be a minimum of four trustees and a maximum of 10. At the end of the reporting period there were five trustees.

Following appointment, new trustees are introduced to their new roles and given a Trustee's Handbook, which covers all aspects of the role. This includes a copy of the Charity Commission's guide 'The Essential Trustee' and copies of the Charity's Governing Document, financial

statements and a guide to the policies and procedures adopted by the charity. An induction checklist is included to ensure everything is covered and signed off. All Trustees are Disclosure & Barring Service (DBS) checked and references obtained.

Voluntary support

Whilst voluntary help is not assigned a value for the purposes of the financial statements, we benefit immensely from the services provided by our incredible volunteers.

During the reporting period, 126 volunteers completed more than 5,000 volunteer hours between them. This volunteer contribution supports all of our schemes as well as supporting functions and fundraising.

The trustees thank all our volunteers for their continued support. Without their time and skills, our impact would not be as significant as it is.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Strategic risk management is regularly overseen by the board of trustees. There is an overarching risk management policy which involves a regular review of key risks faced by the charity. It also sets up systems and procedures to address those potential risks and to minimise any impact on the charity if the risks materialise. The risk register is reviewed annually.

The trustees also have policies in place addressing the main operational risk areas. The trustees consider the following to be the key risks facing the organisation:

- Similar to many charities, the main risks facing WiSE are financial, relating to the loss of contracts, a reduction in grant income or a reduction in public donations, thus impacting on income targets. Due to the reliance identified above, we need to take account of changing economic, policy and social conditions which may affect individual supporters, corporate donors and statutory and trust funders. These risks are managed proactively through the assessment of new opportunities and existing contracts, planned appeals and the continuous review of organisational costs. An appropriate level of funds will be maintained to help mitigate the main financial risks. Additionally, trustees monitor results quarterly and consider the long term impact of emerging trends. They also oversee compliance with fundraising regulation and ensure fundraising is carried out to high ethical standards. We are continuing to invest in income diversification projects to mitigate the risk where possible.

- We recognise the importance of safeguarding vulnerable people in all areas of our work. The charity has a safeguarding policy which applies to all staff and volunteers who have regular contact with older people. This policy is supported by safer recruitment practice and training programmes for staff and volunteers. Although we believe the operational procedures have strong safeguards embedded in them, it remains a key risk on our risk register.
- We recognise the risks associated with information security and the importance of protecting our IT systems from malicious attack and unauthorised access and misuse. Security measures are in place to protect from unauthorised access to IT systems and to test vulnerabilities in the network. We hold a limited amount of personal information about our service users. We have a Data Protection policy in place which ensures only authorised access to personal details and continues to enhance the security of the data in line with best practice.
- We deliver services where they are needed. In all situations the health and safety of our staff, service users and others working with us is a prime concern. A significant proportion of staff and volunteers are lone workers, making visits to a range of locations. The charity has appropriate policies, guidance and training, and any health and safety concerns are reported to the trustees at regular board meetings.

Fundraising

All our fundraising activities deliver on our fundraising promise. We proactively comply with all fundraising related legislation and marketing regulation. All of our fundraising activity has been led by staff and volunteers.

As part of our approach, policies and standards, we make sure we protect vulnerable people and other members of the public from inappropriate behaviour. We proactively train everyone involved in fundraising, with clear processes in place to monitor and manage every interaction. In the past year, we have not uncovered any failure by staff or volunteers to comply with these schemes and standards and we received no fundraising complaints in 2023/24.



Independent Examiners Report

WISE – WETHERBY IN SUPPORT OF THE ELDERLY

Independent Examiner's Report to the Trustees

I report on the accounts of the Trust for the year ended 31 March 2024, which are set out on pages 6 to 10.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. [The Charity is preparing accrued accounts and I am qualified to undertake the examination by being a qualified member of The Association of Chartered Certified Accountants]

It is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act;
- To follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5) of the 2011 Act; and
- To state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and the seeking of explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with s. 130 of the Charities Act 2011; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Act have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Graeme Peter Greenfield
G L Barker & Co LLP
Chartered Certified Accountants
49 Austhorpe Road
Cross Gates
Leeds
LS15 8BA

Signed

Date: 11/01/24

Statement of Financial Activities

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2024

	Note	Unrestricted Funds	Restricted Funds	Total 2024	Total 2023
		£	£	£	£
Turnover					
Core funding		132,396	-	132,396	132,396
WISE Café		54,751	-	54,751	44,082
Hubs activities		13,584	-	13,584	12,740
CIN Gardening scheme grants		40,000	-	40,000	-
Dementia Café (was Meet up Monday)		-	20,480	20,480	46,500
Donations and grants		15,987	-	15,987	28,677
Household Support Fund		32,100	-	32,100	20,250
		<u>288,818</u>	<u>20,480</u>	<u>309,298</u>	<u>284,645</u>
Other income					
Employment allowance		5,000	-	5,000	5,000
Interest income		4,647	-	4,647	1,953
		<u>9,647</u>	<u>-</u>	<u>9,647</u>	<u>6,953</u>
Total Income		298,465	20,480	318,945	291,598
Expenditure					
Rent		4,850	-	4,850	3,233
Insurance		1,195	-	1,195	1,093
Café expenditure		21,419	3,837	25,256	19,284
Salaries		169,861	7,568	177,429	160,241
Social security		12,034	-	12,034	11,142
Pensions		3,304	-	3,304	2,946
Telephone and internet		2,414	-	2,414	1,553
Post printing and stationery		6,654	-	6,654	4,755
Advertising and marketing		2,787	-	2,787	2,994
Travelling		3,058	-	3,058	1,966
Hub activities expenditure		27,876	-	27,876	25,572
CIN gardening expenditure		40,120	-	40,120	21,862
Computer equipment and consumables		9,234	-	9,234	6,721
Covid expenditure		-	-	-	120
Subscriptions		451	-	451	206
Sundry expenses		2,443	-	2,443	5,400
Training		969	-	969	4,441
Accountancy fees		2,760	-	2,760	2,580
Bookkeeping		2,622	-	2,622	2,573
Legal & professional fees		2,701	-	2,701	2,615
Donations		4,050	-	4,050	2,700
		<u>320,802</u>	<u>11,405</u>	<u>332,207</u>	<u>283,997</u>
		(22,337)	9,075	(13,262)	7,601

Balance Sheet

Finance costs				
Bank charges	<u>659</u>	<u>-</u>	<u>659</u>	<u>635</u>
	659	-	659	635
Net Profit	(22,996)	9,075	(13,921)	6.966

The notes on pages 4 to 6 form part of these accounts.



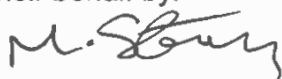
Notes to the Accounts

BALANCE SHEET AS AT 31 MARCH 2024

	Notes	£	2024 £	£	2023 £
FIXED ASSETS					
Tangible fixed assets				-	-
Current Assets					
Debtors and prepayments	5	2,487		2,587	
Cash at bank and in hand		<u>355,476</u>		<u>356,885</u>	
		357,963		359,472	
Current Liabilities					
Creditors	6	<u>16,980</u>		<u>4,568</u>	
NET CURRENT ASSETS			<u>340,983</u>		<u>354,904</u>
NET ASSETS			<u>340,983</u>		<u>354,904</u>
FUNDS					
Restricted funds			94,878		174,850
Unrestricted funds			<u>246,105</u>		<u>180,054</u>
			<u>340,983</u>		<u>354,904</u>

Approved by the trustees on

and signed on their behalf by:



Mark Storey
Chair of the Trustees

(DATE)

11/10/24

The notes on pages 4 to 6 form part of these accounts.

Notes to the Accounts

WISE – WETHERBY IN SUPPORT OF THE ELDERLY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

1. ACCOUNTING POLICIES

a. **Basis of preparation of accounts**

The accounts have been prepared under the historic cost convention and in accordance with applicable accounting standards and follow the recommendations in 'Accounting and Reporting by Charities' (SORP).

b. **Income**

Grants receivable are accounted for on receipt, unless the period to which they relate is specified by the funder, in which case they are applied to the appropriate accounting period and that part of the grant relating to a future accounting period is included in deferred income. Voluntary income and donations are accounted for as received by the charity.

c. **Resources expended**

Resources expended are recognised in the period in which they are incurred. Resources expended include attributable VAT which cannot be recovered.

d. **Unrestricted funds**

Unrestricted funds are donations and other incoming resources receivable or generated for the objects of the charity without further specified purpose and are available as general funds.

e. **Restricted funds**

Restricted funds are those funds which are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Notes to the Accounts

WiSE – WETHERBY IN SUPPORT OF THE ELDERLY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

2. NET OUTGOING RESOURCES FOR THE YEAR

The net outgoing resources for the year are stated after charging:

	2024	2023
	£	£
Accountancy	2,070	1,935
Independent Examiner's fee	690	645

3. STAFF COSTS AND NUMBERS

Staff costs were as follows:-

	2024	2023
	£	£
Wages and salaries	177,429	160,241
Social security costs	12,034	11,142
Pension contributions	3,304	2,946
	<u>192,767</u>	<u>174,329</u>

The average weekly number of employees during the year, was as follows:-

	2024	2023
Charitable work – activities for the elderly	11	10
Administration	<u>-</u>	<u>-</u>
	<u>11</u>	<u>10</u>

All staff members do their own administration.

4. TRUSTEES

No remuneration or expenses were paid to trustees in the year.

Notes to the Accounts

WISE – WETHERBY IN SUPPORT OF THE ELDERLY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2024

5. DEBTORS AND PREPAYMENTS

	2024	2023
	£	£
Prepayments	2,474	2,571
Other Debtors	13	16
	<u>2,487</u>	<u>2,587</u>

6. CREDITORS

	2024	2023
	£	£
Trade Creditors	9,844	1,891
Accruals	2,842	2,677
Social Security & Other Taxes	3,191	-
Pensions	1,103	-
	<u>16,980</u>	<u>4,568</u>

7. ANALYSIS OF NET ASSETS BY FUND

	Unrestricted Funds	Restricted Funds	Total
	£	£	£
Current assets	263,085	94,878	357,963
Current liabilities	(16,980)	-	(16,980)
	<u>246,105</u>	<u>94,878</u>	<u>340,983</u>

8. MOVEMENTS IN FUNDS

	Balance 1 April 2023	Movement in Incoming	Resources Outgoing	Transferred (out) / in	Balance 31 March 2024
	£	£	£	£	£
Children in Need Gardening Scheme	-	-	-	-	-
Dementia Café	85,803	20,480	11,405	-	94,878
Household Support Fund	14,950	-	-	(14,950)	-
Covid	74,097	-	-	(74,097)	-
Restricted Funds	174,850	20,480	11,405	(89,047)	94,878
Unrestricted Funds	180,054	298,465	321,461	89,047	246,105
	<u>354,904</u>	<u>318,945</u>	<u>332,866</u>	<u>0</u>	<u>340,983</u>

9. INDEMNITY INSURANCE

Indemnity insurance has been purchased to protect the charity, trustees and officers from loss arising from the neglect or default of the trustees or officers.

Financial Review

FINANCIAL REVIEW – 1 APRIL 2023 – 31 MARCH 2024

During the period covered by this set of accounts, WiSE continues to operate both strongly and efficiently, from a financial prospective which is reflected in the 2022-2023 Financial Statements.

BANK ACCOUNTS:

The Charity operated with two bank accounts.

CURRENT ACCOUNT:

This account is used for the daily income and expenditure of the organisation.

Within this account are also restricted funding, which is ring-fenced for specific projects and funding was obtained.

All the funds within this account are used to deliver services and activities, primarily for older residents, but also for the broader community based on the particular funding stream.

Each element of funding that sits within this account is carefully monitored, and records are retained and updated on a monthly basis. This enables us to present a clear audit trail at any time and produce a correct set of accounts at our year end.

RESERVE ACCOUNT:

Funds in the Reserve Account are maintained in a savings account held with the Yorkshire Building Society. These reserves fulfil the Trustees responsibilities in ensuring that:

- * Monies received are used to further the purpose and work of the Charity;
- * The Charity can meet its long-term debts and obligations; and
- * The Charity has reserves to enable it to fulfil its legal and statutory obligations if wound up.

The trustees review the reserve account on an annual basis to ensure that sufficient reserves are held in this account.

FUNDING RECEIVED:

The Charity's principal source of funding is from Leeds City Council Adult Care, BBC Children in Need, Government obtained Household Support Fund, and smaller one-off grants and donations.

Again, each funding stream is individually monitored and income and expenditure recorded for presentation and inclusion in the year end accounts.

FUNDRAISING:

Fundraising is a extremely important to our charity. We therefore thank every organisation and individual who has contributed to our funds during this financial year.

Without that generosity, we would not be able to successfully achieve our objectives around supporting the elderly and vulnerable in our area.

Corporate information

Wetherby in Support of the Elderly (WiSE)
(A charitable incorporated organisation).

Principal address:

24 Westgate
Wetherby
LS22 6NL

Telephone 01937 588994

Website www.w-ise.org.uk

Registered charity number - 1163698

Trustees

The charity trustees are appointed as and when appropriate by the body of trustees in office. The trustees who served during the period and those currently in office are:

Mark Storey (Chair)

Caren Rowe (Treasurer)

John Wardley

Norma Harrington

Michelle Atkinson

Manjit Curtis

Jacquie Clarke (to January 2024)

Chief Operating Officer

Mark Dobson

Independent Examiner

GL Barker & Associates,
47-49 Austhorpe Road,
Leeds,
LS15 8BA

Bankers

Barclays Bank Yorkshire Building Society - online

Thank You

The trustees would like to offer their thanks, again, to everybody who has supported the organisation either through volunteering, offering their valuable time and skills or through invaluable financial support.

We remain as committed as ever to supporting older people in Wetherby and our surrounding communities.

Thank you!



WiSE

Wetherby in Support of the Elderly

© Wetherby in Support of the Elderly 2024.

The copyright of all material appearing in this publication belongs to Wetherby in Support of the Elderly, it may not be reproduced, duplicated or copied by any means without our prior written consent.

CIO Registration No. 1163698

WETHERBY IN SUPPORT OF THE ELDERLY

England & Wales - Charity number 1163698

Accounts

Annual Report and Accounts 2022-23

April 2023



Wetherby in Support of the Elderly Annual Report 2022/23

WiSE is a Charity Commission Registered Charitable Incorporated Organisation (CIO Foundation) No. 1163698.

Contents

3	Chair's Introduction
3	Trustee's Report
5	A Message From Our Chief Operating Officer
7	Strategic Report Our Strategy for 2023/24
8	Achievement and Performance for 2022/2023
9	The Queen's Award for Voluntary Service
11	Other Matters of Significance During the Reporting Period
12-13	Our Activities
14	Activities: A case study
15	WiSE Pay-Ads-You-Feel Café
16	Memory Café
17	Information and Advice
18	Transport Scheme, Grass Cutting and Befriending
19	Send a Smile
21	Volunteering
22-25	Governance Structure and Management
26	Financial Review
27	Independent Examiners Report
28	Statement of Financial Activities
29	Balance Sheet
30-32	Notes to the Accounts
34	Corporate Information

Chair's Introduction:

Welcome to the WiSE Annual Report 2022/23.

An annual report is an opportune moment to reflect upon everything the charity has achieved in the last 12 months.

As Chair of Trustees, I regularly get to hear about the incredible work WiSE's fantastic volunteers and small team of dedicated staff do for older people in our region.

But to see it all captured in a single report like this, not only gives me the reassurance that the charity is fulfilling its statutory requirements – it also gives me a great sense of pride in all that we have achieved together.

I sincerely hope WiSE will build on this work yet again in 2023/24, extending its reach to help even more older people live happy and fulfilling lives in their communities.

Mark Storey
Chair of Trustees.



Trustee's Report:

The trustees present their Annual Report together with the Financial Statement of the charity for the year 1 April 2022 to 31 March 2023.

The trustees confirm these documents comply with the current statutory requirements, the statutory requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) as amended for accounting periods commencing from 1 January 2016.



A message from our Chief Operating Officer:

The last 12 months have flown by for us as a charity – but what a year it's been.

First, 2023 brought our 20th year of operation – a significant milestone which everyone who's been involved in the charity over the years should be rightly proud of achieving. We will be celebrating this later in the year.

Then, we received the incredible news that we'd been named recipients of The Queen's Award for Voluntary Service. This is not only the highest honour a UK charity can ever receive, it's also fitting tribute to the role of our selfless volunteers without whom none of our work would be possible.

Yet we've not stood still.

We might be small, but WiSE has shown how adaptable it can be – responding to the cost of living crisis by introducing a pay-as-you-feel 'Winter Warmer' café (now extended into the summer).

We've also launched a Memory Café for those living with dementia and their carers, in response to a growing local need for this sort of provision.

This is all on top of delivering our existing range of services, many of which you'll read more about in the pages of this report.

What a year. What a team. And roll on 2023/24.

Mark Dobson
Chief Operating Officer
WiSE



Strategic Report

Our Strategy for 2023/24

In 2023/24 we will continue to adapt and extend our services to adapt to local requirements.

We will continue to focus on the provision of much needed services for older people who live in Wetherby and its surrounding villages. We aim to do this to ensure older people are supported to retain their independence and continue to live active lives within their community.

Through the implementation of our strategic framework, we are challenging ourselves to improve our services to be first-class and in high demand, so that the health and wellbeing of those we support is truly enhanced.

Our strategic framework is made up of five core aims:

Continual development of our performance to deliver our operational aims

We are outcome-focused and constantly keep our services under review to ensure they reflect best practice, changing demand and to ensure our services match the needs of our clients, commissioners and broader health and wellbeing agenda. Our services have clear objectives. We set and measure these using evidence.

Reflective practices and monitoring practices are in place, including performance appraisals and review. Our database is kept under review to ensure data capturing is up-to-date, robust and accurate.

Statutory and regulatory requirements are understood, implemented and complied with.

To provide safe and secure services for our client base

Policies and procedures are in place for safeguarding, with a strong focus on adult and child risk, and these are reviewed regularly.

Policies and procedures are in place to ensure we operate within a safe work space and we employ safe working practices and these are reviewed regularly.

Information and data is stored securely in line with regulatory requirements.

An appropriate risk management framework is in place.

To be well led

We are up-to-date with our policies and procedures and ensure these are adhered to. We have effective management systems including a robust trustee body and a management structure that feeds in to the trustees.

Managers proactively support a positive culture which is person-centred for staff, volunteers and the people we support. It is open, inclusive and empowering.

Governance structures are clear and transparent, clearly documented and are regularly implemented and reviewed through meetings.

Current legislation and regulations are complied with.

To be effective in our strategic and operational aims and objectives

We ensure our services are reviewed to reflect our clients' needs.

We have the correct number of staff and amount of staff knowledge to undertake strategic and operational requirements.

Changes in need and local priorities are identified and responded to.

We work effectively with other agencies and our commissioners. We are inclusive and accessible to all within our client base.

To engage with our friends to ensure they are involved with our services to help steer the organisation

We engage with our clients in a variety of ways and ensure they are involved in our work.

Our client base is given opportunities to be involved with the delivery and changing nature of our services. We listen and act upon client feedback.

Through our policies and procedures, our client base and others know how to complain or pass compliments to the service to help steer client involvement and service delivery.

Achievements and Performance 2022-23

What did we say?	What did we do?
We would continue to monitor and evaluate our services and activities and respond to need.	We have continued to expand our services during the reporting year, including adding many new permanent and one-off fixtures to the WiSE activities calendar. This includes a weekly Pay-As-You-Feel Café to support the community with the cost of living crisis, and a Memory Café to support those living with dementia and their carers.
What did we say?	What did we do?
We will continue to increase our fundraising and community activities to secure the future of our provision.	We have raised a significant amount of external funding this year to enable us to relaunch the Memory Café in January, where demand is so high that there is already a waiting list to attend. We also continue to increase our community fundraising opportunities. For example, we asked the community to make Christmas and Easter products which were sold to generate funds to support the work we do. We also host evening fundraising events featuring musical tribute acts, bringing in further revenue for the charity.
What did we say?	What did we do?
We would continue to improve our profile within the community.	We have continued to significantly raise our profile both in broadcast media, printed journalism and our social media footprint, which has increased pointedly within the last 12 months. In this reporting period, 30 news releases were distributed and there were 117 pieces of press coverage in print, online and broadcast media. Our Facebook page followers have increased by 32% this financial year.
What did we say?	What did we do?
We would increase our volunteer base and offer wider opportunities for volunteers.	Our volunteer coordinator is successful in drawing in new volunteers and ensuring they are matched to an appropriate service area/s. We work with Voluntary Action Leeds and Doing Good Leeds to recruit appropriate volunteers for our roles. Our volunteers are at the heart of everything we do. Our coordinator continues to ensure opportunities increase through the provision of adequate training packages – for example, First Aid training and an increased emphasis on volunteer communication.
What did we say?	What did we do?
Ensure the charity meets the high standards listed in The Charity Governance Code.	Our trustees meet regularly and make sure the chief operating officer is working within the remit laid down by the organisation, ensuring our ethics and values are achieved and that we are working in line with our strategies. We ensure these essential checks and balances are in place and that all our staff and volunteers are working to the highest possible standards reflecting the code of governance at all times.

The Queen's Award for Voluntary Service

In this reporting period, WiSE and its incredible army of volunteers were granted The Queen's Award for Voluntary Service – the nation's highest possible royal honour for the voluntary sector.

This prestigious award, which was announced just before HM's Jubilee celebrations, was a fitting reward for our 123 volunteers who go above and beyond to help isolated, older people across the district.

In January, more than 75 people came together for a gala dinner where we were formally granted The Queen's Award with a certificate signed by the Queen and a domed glass crystal, which was presented by the Lord Lieutenant Ed Anderson. The Lord Mayor of Leeds, Councillor Robert W Gettings also attended.

The Queen's Award for Voluntary Service (now The King's Award) recognises outstanding work done by charity volunteers in their own communities.

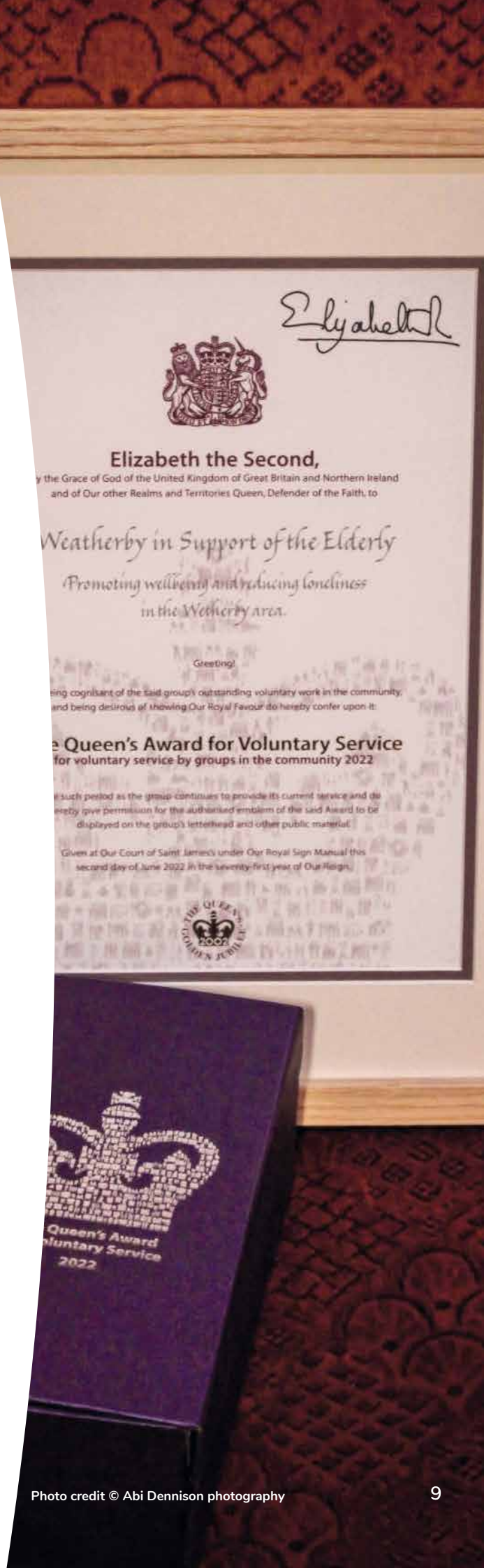
Any group doing volunteer work providing a social, economic or environmental service to the local community can be nominated for the award. The groups are then assessed on the benefit they bring to the local community and its standing within that community.

“

“This national honour is the greatest recognition a charity like ours can ever receive and represents deserved appreciation for the efforts of our incredible volunteers over many years. Volunteers are the lifeblood of our work – generously giving their time and energy to help older people in Wetherby and its surrounding villages live healthy, fulfilling lives.”

Mark Dobson, Chief Operating Officer.

”





DEREK MATCHAM
CHAIRMAN
1973-1985
WALTON VILLAGE HALL

Other matters of significance during the reporting period

We have had a strong year, delivering our goals across all our core services.

During the reporting period (1 April 2022 to 31 March 2023), we:

- Served 8,618 visitors to the WiSE Owl Café.
- Regularly scheduled 13 different socials groups, hosting 279 timetabled activities, in 8 different venues, in various settings across Wetherby, and surrounding villages. At these events we welcomed - 4,355 older people through our doors, between April 2022 and March 2023.
- Arranged for 75 people to have their grass cut each month.
- Made 635 transport journeys, whereby our volunteers drive older people to activities or social engagements and local health appointments they would otherwise not have been able to attend.
- Ensured 14 people received contact from a friendly caller or visitor.
- Administered 715 contacts via the Information & Advice service.
- At the end of the reporting period, we had 123 volunteers across our programmes.
- Sent 1,469 Send a Smile cards and 542 birthday cards to friends and volunteers of WiSE.

We funded the autumn course of Wetherby Man With A Pan. This is a partner initiative which aims to help older men with no cooking experience become more confident in the kitchen.

This year we have received Household Support Funding from the government. This has enabled us to help local people of all ages with the cost of living crisis. We have opened our extremely popular Winter Warmer/Pay-As-You-Feel Café which has been an enormous success working in partnership with our friends at Wetherby Town Hall. We will be extending the service into 2023/24.

We've also used this grant to become micro commissioners - giving start-up grants to other community groups, such as churches and local parish councils. This has helped us support more local people and forge excellent community partnerships which we always endeavour to be at the heart of.

As you have already read, this year we were awarded the Queen's Award for Voluntary Service – the highest accolade that we as a charity can receive. We have also had our funding renewed for three-year period to continue the gardening scheme via BBC Children In Need.

Finally, in September 2022, we welcomed Jacquie Clarke as our sixth Trustee.

Our Activities – An overview

We carry out a wide range of services and activities in line with our charitable objectives. The trustees consider that these services and activities provide benefit to older people and their carers in our area.

Our activities and services are promoted in a variety of ways. We actively engage with local parish councils and community groups and more than 500 newsletters are issued each quarter, via e-mail, post or hand. We also produce a monthly activities sheet which is distributed to hundreds of our friends.

Our in-house communication officer provides publicity material to the media in Wetherby and Leeds and we continue to advertise in parish magazines. We display information on our services at GP surgeries, local churches, Wetherby Town Hall, and the One Stop Centre. We also promote our events and activities on our website and social media platforms.

WiSE Owl Café

The café is based in Boston Spa Village Hall and has recently celebrated its 10 year anniversary. It is still a popular event, acting as a regular meet up for many of our customers, be it for coffee and a chat, or lunch. The café has two part-time staff members supported by a dedicated band of volunteer servers and bakers. It sources its food from local suppliers and volunteer bakers make the delicious cakes and scones.

Line Dancing

Line dancing promotes balance, coordination and is an excellent cognitive exercise which is relevant for our target age. The session leader is very popular with our clients. They provide weekly online dances to keep our regulars in practise.

Move & Groove

Move & Groove is a fun, informal dance class with an instructor from Funky Jives, who teaches everything from Salsa to Bollywood, Disco to Freestyle and anything in-between. Participants are invited to stay for a drink and a chat afterwards.

Elderberries

Elderberries is a monthly social gathering which takes place at St Joseph's Village Hall. All friends and carers are welcome to attend Elderberries, where they are entertained by professional musicians or local entertainers.

Knit, Natter, Craft & Chatter

Knit, Natter, Craft & Chatter is held every Thursday at Deepdale Community Centre. Every week there is a new craft theme including; latch hook cushions, paper flowers, gnome painting, keyrings and wreath making. People are also invited to bring their own project. The event is increasing in popularity and we have recently moved into a bigger room.



Bingo & Fun

Bingo & Fun involves bingo, games and quizzes along with prizes for the winners. It is held during the winter at Wetherby Sports Association.

Walton Coffee Morning

This event is held on the first Monday of every month, at Walton Village Hall. Everyone of all ages is welcome – not just the over 60s.

WiSE Memory Café

Our Memory Café is hosted twice a month at St James' Church in Wetherby to support those living with dementia and their carers. More detailed information can be found later in this report.

WiSE Pay-As-You-Feel Café

The Pay-As-You-Feel Café was launched to support people of all ages with the cost of living crisis. It takes place weekly at Wetherby town Hall. More detailed information can be found later in this report.

Chairobics and Aerobics and WiSErcise

Both gentle chair based exercise classes, ceased in February 2023. **WiSE Warblers** – a singing group with Singtasia, ended in July 2022.

Ad hoc events and celebrations

From time-to-time, we host events to acknowledge national celebrations and to raise additional funds to enhance our key services. In this reporting period we hosted fundraising events with three tribute acts; The Pretend Beetles, Angel Eyes and Memphis Pete, all at The Engine Shed, Wetherby. We collaborated with M&Co for a fundraising fashion show and hosted a Christmas Party with 100 guests. In January, we hosted

a gala dinner where we were formally presented with The Queen's Award for Voluntary Service. We are planning a party to celebrate the King's Coronation in May.

Partnerships

The trustees are particularly grateful to our community partners for all their support. All have helped us to meet our objectives and benefit older people and their carers in our area.

We are especially grateful for the support of Boston Spa Village Hall, which is home to our much-loved Wise Owl Café.

Other local partnerships include:

- St Joseph's Church
- The Methodist Church in Wetherby
- St James' Church, Wetherby
- The Engine Shed, Wetherby
- Bramham Village Hall
- Walton Village Hall
- Thorner Over 55's Club
- Churches Together
- Wetherby District Lions Club
- Wetherby Racecourse & Conference Centre
- The Community Committee
- Voluntary Action Leeds and Doing Good Leeds
- Local Primary Care Team/NHS, Outer North East Community Committee
- Wetherby Co-operative
- Morrison's Wetherby
- Sainsbury's Wetherby
- Wetherby Sports Association

We welcome local groups, whether small and informal or larger in size, to contact us through our Activities Coordinator via email on activities@w-ise.org.uk.



Activities: A case study

Joan started going to WiSE activities for the first time after the pandemic when a complex operation on her back meant she was unable to take part in regular group swimming lessons. These had formed a crucial part of her social calendar.

Now Joan is fully immersed in the charity's varied programme of activities and events, which she says have helped her to forge new friendships.

Joan said: "My daughter recommended I contact WiSE, but I was worried it was for elderly people and I do not feel elderly. I saw that there was a line dancing class, so I phoned up for more information. I really enjoyed it and I go every Friday now.

"I also attend Move & Groove, a dance based exercise class, with Kat from Funky Jives. It is brilliant because it feels like a physical work out. Kat's choreography is spot on and I love the music. I also go to WiSE's fundraising events, I went to the Elvis tribute act Memphis Pete and Abba tribute – we danced our socks off!

“

WiSE activities are great as they have something for everyone and you can choose what you're interested in. I love getting out and getting some exercise – it's not like going for a walk on your own, it's much more uplifting.

”

We moved to Wetherby around 10 years ago and did not have many friends in the area. Thanks to these classes I've made some really good friends, and we often go for coffee and lunch afterwards. It's a really friendly crowd and I like that we all laugh together.

“

My advice would be that if anyone is thinking of joining in with the charity's activities, to do so. The classes are very affordable and if you don't like it then you aren't forced to go back!

”



WiSE Pay-As-You-Feel Café

In November, we launched Wetherby's first-of-its kind winter warmer café for people of all ages – not just the over 60s. We initially launched the pay-as-you-feel facility as a winter facility at Wetherby Town Hall. This was in response to rising food and energy costs which threatened the health and wellbeing of people across the district. The café serves hot drinks, soup, rolls and cakes alongside games and activities in a warm, safe environment.

Thanks to government funding, we have been able to extend the café for another six months so that people of all ages can continue to benefit.

Mark Dobson, Chief Operating Officer at WiSE, said: "We knew this winter was going to be extremely hard for people, but even we weren't prepared for just how many people would welcome an initiative like this.

“

It's clear that demand for this café is extremely high and the feedback we've had from local people has been very good. Even when the cold weather ends, people are still struggling to make ends meet whilst also grappling isolation, this is the reason why we wanted to extend the café for a further 6 months.

”

"From time-to-time, other local organisations attend the café to offer advice on how people can stay safe, warm and well this winter, so it's a real partnership effort as we come together to support people in Wetherby and its surrounding villages in a time of great need."

The WiSE Pay-As-You-Feel café opens every Tuesday, 11.30am to 1.30pm at Wetherby Town Hall. The café is supported by organisations including The Oven Door, CLO Coffee, Sainsbury's and Wetherby & District Foodbank.



Memory Cafe

The WiSE Memory Café launched in January thanks to funding from multiple sources, including the National Lottery Awards For All and McCarthy Stone Foundation.

We employed a part-time Dementia Lead to coordinate sessions designed to maintain wellbeing and social interaction for all those who attend.

The café supports those living with dementia and their carers by providing an appropriate setting to focus on clients' wellbeing, with sessions facilitated by a trained staff member, alongside WiSE's volunteers. Support and advice is also offered to family carers to assist them in their day-to-day continuing and challenging caring role.

The café is open for referrals only – both agency and personal. The session costs £3 for both carer and person living with dementia inclusive.

The café meets twice a month on Wednesdays, 1.30pm to 3.30pm at The Church Rooms, Church Centre St James in Wetherby. Already demand is so high, that we have a waiting list for new attendees.

“

It's the first time in ages I've seen mum so relaxed and enjoying herself.

”



Information & Advice

This service provides information and advice to over 60s on a range of issues, including how to apply for allowances and benefits, support for people with form filling, guidance on finding trusted tradespeople or carers and directing clients to appropriate support services and organisations.

We have an experienced and knowledgeable Information & Advice Coordinator based at our Wetherby offices, who also provides a roaming service at local venues.

From April 2022 to March 2023 there were 715 Information & Advice contacts with friends, family/carers and organisations such as Linking Leeds.

More than half of these contacts resulted in signposting / referral to appropriate organisations and sources of support, including Department for Work & Pensions, Leeds City Council, Carers Leeds and Leeds Directory.

Sixty-five clients received intensive one-to-one support, which included completion of 75 forms, from bus passes to care ring pendant alarm applications.

The Information & Advice service also completed 17 blue parking badge applications and filled in 33 attendance allowance forms using a telephone appointment service.

During the reporting period, there were 190 new referrals to WiSE, which came from NHS health practitioners, friends, family and carers and Linking Leeds amongst others.

Information & Advice – a case study – Mrs V

What we found:

- Without intervention Mrs V was at risk of increased mobility problems, and mental health problems.
- Mrs V had sight problems.
- This increased her loneliness and isolation and a further deterioration in confidence.

What we did:

- Having enquired about the Transport Scheme, Mrs V was matched with a volunteer driver to go to Bingo & Fun – one of WiSE's activities.
- Following this, Mrs V was matched with a volunteer driver to attend Knit, Natter, Craft & Chatter and enjoyed the group.
- Mrs V was then encouraged to join in the WiSE Special event – an afternoon at Wetherby Races, but Mrs V lacked the confidence. WiSE's activities and transport coordinators addressed concerns and a transport volunteer was booked and the journey was made.

Mrs V described the day as:

“

The best experience I have had in years.

”

Transport Scheme

The Transport Scheme provides a low cost door-to-door pick up and drop off service for people over 60 who are less mobile, don't drive, or struggle with public transport. The scheme has been running for six and a half years and is greatly valued by our friends.

The service – which operates in Wetherby and surrounding areas – has a number of trusted volunteer drivers who will collect a service user and drive them to GP and local healthcare appointments, WiSE activities, or to meet up with friends.

Journeys are offered Monday to Friday 8am to 6pm and all bookings are made through our transport booking line. The service is more cost effective than taxis. It costs £2 per journey, plus 60 pence for every mile travelled, which is paid for at the destination. Drivers are able to accommodate fold-up rollators or walking sticks, but unfortunately can't take wheelchairs.

During the reporting period, 635 transport journeys have been completed, whereby the charity's volunteers drive older people to activities or social engagements they would otherwise not have been able to attend.

Grass Cutting

This year, the first funding for our successful Grass Cutting Scheme ended. We'd delivered the scheme in collaboration with the HM Wetherby Young Offenders Prison Service, using funds provided by BBC Children In Need.

This unique collaborative project has meant many local people have had access to cheap and affordable grass cutting. Once we identify older people in need of help, WYOI provide a trained horticulturist to supervise young offenders who have expressed an interest in developing horticultural skills. It has been fantastic for so many under privileged young people from the prison to be working in the community and learning new skills.

In the reporting period, 75 people have had their grass cut each month.

The gardeners have all been risk assessed for suitability to earn Release or Temporary Licence before they take part in the project. The aim is for them to use this work experience to go towards a relevant qualification, giving them a greater chance of future employment.

The scheme helps to improve relationships between young and older people and is greatly valued by those who use it. The scheme was only one of its kind in the country. It was granted a 'Connecting Communities Award' for the impact it has made so far.

We are extremely pleased that the feedback from Children In Need was exceptional and, the BBC have decided to give us further grant funding for a further three years of the scheme from April 2023.

Befriending

Our befriending service matches an isolated older or vulnerable person living alone with a volunteer who gives up their time to regularly provide friendly conversation and companionship.

Where possible, matches are made based on shared interests and both parties living in the same area. Once a befriending match has been made, each person is introduced in the company of one of our co-ordinators.

We have a team of 10 befriending volunteers who come from all walks-of-life and are asked to commit to a minimum of one hour per week. This involves dropping in for a cup of tea and a chat.

In the last year, our volunteers made, on average, more than 360 befriending visits and 150 calls to our older friends.

For an older person, regular social interaction helps to break their feeling of isolation and helps to make them feel a part of the community.

For the volunteer, the visits are often satisfying, enjoyable and an opportunity to meet someone new to hear about their stories and experiences.

‘Send a Smile’ Scheme

The ‘Send a Smile’ scheme has gained huge popularity with the community. The scheme was launched as a way of further extending the charity’s work to reduce isolation and loneliness in older people.

It is also designed to build new and lasting two-way community relationships, including between organisations like care homes, craft groups and schools. It complements the existing Befriending Scheme for people who live alone and promotes positive intergenerational interactions by establishing partnerships with schools and colleges.

‘Send a Smile’ encourages people of all ages, from across the region and afar, to submit postcards, pictures or hand drawn cards to make an isolated, older person smile. Cards are sent to the WiSE offices where they are then distributed to our friends.

In this reporting period we have received 1,469 cards, letters and postcards. This year we launched a Christmas Card appeal to let people know that someone is thinking of them over the festivities, which can be a lonely time for many older people. The appeal was so successful that we launched an Easter appeal, asking the community to send spring cards to brighten up an older person’s day.

We have now also opened a nomination system, where people can nominate their family, friends or neighbour to receive a card.



“

I just wanted to say thank you for the Easter Smile Card made by Tockwith School, it certainly did put a smile on my face. The work you do in supporting the elderly in Wetherby is amazing and when you live alone, even the little things like receiving a Smile Card lifts your spirit. Without your organisation and volunteers, Wetherby would be a lot worse off.

Jeff..

”



PAY AS
YOU FEEL
CAFE
ALL WELCOME



11:30 — 1:30 pm

Volunteering

We actively recruit volunteers over the age of 16 to assist in the delivery of our services. We work with Voluntary Action Leeds and Doing Good Leeds to advertise our volunteering roles, plus on our own social media channels.

Volunteering is a worthwhile and enjoyable activity and there are a wide range of opportunities available with us. Our Volunteer Co-ordinator is based at our Wetherby offices and welcomes enquiries from people who want to support those in the local community. All volunteers undertake an induction and receive training appropriate to their role.

Volunteers are vital to our success. Without them we could not continue to develop our services and programme of events. Their help in delivering our services, through roles such as activity helpers, befrienders, dementia supporters, drivers, fundraising, and trusteeship means we can continue our vital work. At the end of the reporting period, we had 123 volunteers across our programmes. The volunteers range from younger people to very senior adults. Our volunteer coordinator is working hard to improve our support through training, recognition and communication. We are also continuing to develop additional volunteering opportunities.



Governance Structure and Management

Our constitution

WiSE is a Charitable Incorporated Organisation (CIO). It is governed according to a Charity Commission Foundation Model Constitution (dated 22 September 2015) and is therefore detailed and fit for purpose and protects the continuation of the charity.

Our objective

The objectives of the CIO are all for the public benefit.

Chiefly, our aim is to support older people, and those who care for them, who live in the Wetherby area (Wetherby, Linton, Boston Spa, Thorp Arch, Walton, Clifford, Bramham, East Keswick, Harewood, Collingham, Bardsey, Scarcroft and Thorner) and who are socially isolated, or living with chronic or degenerative conditions. This is so that they can retain their independence and continue to live active lives within their community.

Public benefit

In planning our activities, the trustees consider the specific objectives of the charity, along with our vision, mission and values. We review our aims, objectives and activities annually. As part of that process, we consider the outputs of our activities, assess the benefit of those outputs on the lives of older people and develop future activities to make sure our work continues to deliver the most benefit against our charitable objects.

This report contains more information on the way our work has benefited older people over the last 12 months, measured against objectives set at the beginning of the year.

The trustees confirm they have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Activities

This is our 20th year supporting Wetherby's older people. During that time, we have seen our organisation grow, both in terms of services we provide and the requests for help we receive. It is well-known that older people are living longer and need more support to enable them to live a comfortable and independent lifestyle and through our range of activities and services we aim to make this happen.

We want to place WiSE at the heart of its community. To do this effectively we continually monitor and evaluate the services and activities we provide to ensure they meet the needs of our friends and their carers. Our current provision includes:

- Befriending
- Information and Advice
- Transport Scheme
- Grass Cutting
- Send a Smile Scheme
- The WiSE Owl Café
- Line Dancing
- Move & Groove
- Elderberries
- Knit, Natter, Craft & Chatter
- Bingo & Fun
- Walton Coffee Morning
- WiSE Pay-As-You-Feel Café
- WiSE Memory Cafe

The schemes are co-ordinated by a team of staff, with a large amount of work carried out by our 123 volunteers. These volunteers work in many different roles in the community, support roles or directly with friends - not only making many of our schemes possible by giving their time freely, but also bringing a true community perspective to our work.

All our work supports the wellbeing of older people in Wetherby and surrounding area. This means we help people to stay safe, well and live independently in their community for as long as possible.

We had more than 715 contacts with friends and their families during the reporting period. We also received at least 190 new formal referrals- with the number of informal referrals likely to be even higher.

Whilst these numbers illustrate our activity levels, they do not reflect the significant positive ripple that comes from many actions, bringing additional benefits to our friends, their family, wider networks and community. This is something we are looking to measure in the future. The social benefit that WiSE brings is without question, but as yet we cannot attribute a value to that benefit. This is something we want to change.

We are committed to collaborative working and this continued in 2023/24 with renewed partnerships with voluntary, statutory and private sector organisations, all of which were focused on promoting and supporting the welfare of older people living locally. Adopting a joint approach means we can keep our friends and their families as the focus of our attention when designing and delivering new services.

Governance and management

The overall management and control of the charity rests with the individual members of the board of trustees who give their time freely and receive no remuneration

or other financial benefits. The charity's trustees meet in accordance with the constitution which requires the presence of at least two or, if greater, a third of its members to be quorate. The Board may appoint a chairperson and revoke such appointment at any time. All business is decided by a simple majority, each trustee having one vote. In the event of an equality of votes, the chairperson of the meeting has a second or casting vote. The trustees are responsible for decisions taken in relation to the strategic running of the charity, but the day-to-day running of the charity is delegated to staff.

Trustee committees

The trustees delegate responsibility for more detailed consideration of the charity's affairs to four sub groups, each including at least two places for trustee members, chaired by a trustee and reporting to the board of trustees. These subgroups are:

- Finance
- HR and Policies
- Strategy and Service Development
- Fundraising and Marketing

Recruitment and appointment of new trustees

The existing trustees are responsible for the recruitment of new trustees. The trustees undertake a skills audit, which identifies specific skills needed to enhance the existing board. In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO. In addition, individuals who apply to become trustees must demonstrate a personal or professional interest in the care and well-being of older people.

Every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of trustees. Trustees retiring at the end of their term are eligible for reappointment. A trustee who was served for three consecutive terms of three years may not be reappointed for a fourth consecutive term, but may be reappointed after an interval of at least one year.

There shall be a minimum of four trustees and a maximum of 10. At the end of the reporting period there were five trustees.

Following appointment, new trustees are introduced to their new roles and given a Trustee's Handbook, which covers all aspects of the role. This includes a copy of the Charity Commission's guide 'The Essential Trustee' and copies of the Charity's Governing Document, financial statements and a guide to the policies and procedures adopted by the charity. An induction checklist is included to ensure everything is covered and signed off. All Trustees are Disclosure & Barring Service (DBS) checked and references obtained.

Voluntary support

Whilst voluntary help is not valued for the purposes of the financial statements, we benefit immensely from the services provided by our incredible volunteers.

During the reporting period, 123 volunteers completed several thousand volunteer hours between them. This volunteer contribution supports all of our schemes as well as support functions and fundraising.

The trustees thank all our volunteers for their continued support. Without their time and skills, our impact would not be as significant as it is.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Strategic risk management is regularly overseen by the board of trustees. There is an overarching risk management policy which involves a regular review of key risks faced by the charity. It also sets up systems and procedures to address those potential risks and to minimise any impact the charity if the risks materialise. The risk register is reviewed annually.

The trustees also have policies in place addressing the main operational risk areas. The trustees consider the following to be the key risks facing the organisation:-

- Similar to many charities, the main risks facing WiSE are financial, relating to the loss of contracts, a reduction in grant income or a reduction in public donations, thus impacting on income targets. Due to the reliance identified above, we need to take account of changing economic, policy and social conditions which may affect individual supporters, corporate donors and statutory and trust funders. These risks are managed proactively through the assessment of new opportunities and existing contracts, planned appeals and the continuous review of organisational costs. An appropriate level of funds will be maintained to help mitigate the main financial risks. Additionally, trustees monitor results quarterly and consider the long term impact of emerging trends. They also oversee compliance with fundraising regulation and ensure fundraising is carried out to high ethical standards. We are continuing to invest in income diversification projects to mitigate the risk where possible.
- We recognise the importance of safeguarding vulnerable people in all areas of our work. The charity has a safeguarding policy which applies to all staff and volunteers who have regular contact with older people. This policy is supported by safer recruitment practice and training programmes for staff and volunteers. Although we believe the operational procedures have strong safeguards embedded in them, it remains a key risk on our risk register.



- We recognise the risks associated with information security and the importance of protecting our IT systems from malicious attack and unauthorised access and misuse. Security measures are in place to protect from unauthorised access to IT systems and to test vulnerabilities in the network. We hold a limited amount of personal information about our service users. We have a Data Protection policy in place which ensures only authorised access to personal details and continues to enhance the security of the data in line with best practice.
- We deliver services where they are needed. In all situations the health and safety of our staff, service users and others working with us is a prime concern. A significant proportion of staff and volunteers are lone workers, making visits to a range of locations. The charity has appropriate policies, guidance and training, and any health and safety concerns are reported to the trustees at regular board meetings.

Fundraising

The majority of our voluntary income last year was raised through charitable trusts and foundations which supported our projects and services. A small amount of income came from service users and individuals supporting our work.

The Pay-As-You-Feel' Café received £14,900 from five separate funders. Letters sent to Charitable Trusts have generated £5,000 for our activities programme. Letters focusing on loneliness sent out to Charitable Trusts have generated £10,767. We also received £2,500 from a local company, Eaden Wealth to replace telephone and digital equipment in the WiSE office. Unsolicited donations totalled £4775.00 and £100 was received in private donations.

The majority of donations for our Memory Café were received in financial year 2021/22, this financial year an additional funding of £4,250 has been received, taking the overall total to £73,558.00.

All our activities deliver on our fundraising promise. We proactively comply with all fundraising related legislation and marketing regulation. All of our fundraising activity has been led by staff and volunteers.

As part of our approach, policies and standards, we make sure we protect vulnerable people and other members of the public from inappropriate behaviour. We proactively train everyone involved in fundraising, with clear processes in place to monitor and manage every interaction. In the past year, we have not uncovered any failure by staff or volunteers to comply with these schemes and standards and we received no fundraising complaints in 2022/23.

FINANCIAL REVIEW – 1 APRIL 2022 – 31 MARCH 2023

During the period covered by this set of accounts, WiSE continues to operate both strongly and efficiently, from a financial prospective which is reflected in the 2022-2023 Financial Statements.

BANK ACCOUNTS:

During this period the Charity operated with two bank accounts.

CURRENT ACCOUNT:

This account is used for the daily income and expenditure of the organisation.

Within this account are also restricted funding, which is ring-fenced for specific projects and funding was obtained.

All the funds within this account are used to deliver services and activities, primarily for older residents, but also for the broader community based on the particular funding stream.

Each element of funding that sits within this account is carefully monitored, and records are retained and updated on a monthly basis. This enables us to present a clear audit trail at any time and produce a correct set of accounts at our year end.

RESERVE ACCOUNT:

Funds in the Reserve Account are maintained in a savings account held with the Yorkshire Building Society. These reserves fulfil the Trustees responsibilities in ensuring that:

- * Monies received are used to further the purpose and work of the Charity;
- * The Charity can meet its long-term debts and obligations; and
- * The Charity has reserves to enable it to fulfil its legal and statutory obligations if wound up.

The trustees review the reserve account on an annual basis to ensure that sufficient reserves are held in this account.

FUNDING RECEIVED:

The Charity's principal source of funding is from Leeds City Council Adult Care, BBC Children in Need, Government obtained Household Support Fund, and smaller one-off grants and donations.

Again, each funding stream is individually monitored and income and expenditure recorded for presentation and inclusion in the year end accounts.

FUNDRAISING:

Fundraising is a extremely important to our charity. We therefore thank every organisation and individual who has contributed to our funds during this financial year.

Without that generosity, we would not be able to successfully achieve our objectives around supporting the elderly and vulnerable in our area.

Independent Examiners Report

WISE – WETHERBY IN SUPPORT OF THE ELDERLY

Independent Examiner's Report to the Trustees

I report on the accounts of the Trust for the year ended 31 March 2023, which are set out on pages 6 to 10.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. [The Charity is preparing accrued accounts and I am qualified to undertake the examination by being a qualified member of The Association of Chartered Certified Accountants]

It is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act;
- To follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5) of the 2011 Act; and
- To state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and the seeking of explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with s. 130 of the Charities Act 2011; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Act have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Graeme Peter Greenfield
G L Barker & Co LLP
Chartered Certified Accountants
49 Austhorpe Road
Cross Gates
Leeds
LS15 8BA

Signed 

Date: 31/01/23

Statement of Financial Activities

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2023

	Note	Unrestricted Funds	Restricted Funds	Total 2023	Total 2022
		£	£	£	£
Turnover					
Core funding		132,396	-	132,396	139,356
WISE Café		44,082	-	44,082	23,953
Hubs activities		12,740	-	12,740	3,609
CIN Gardening scheme grants		-	-	-	40,560
Dementia Café (was Meet up Monday)		-	46,500	46,500	24,108
Donations and grants		28,677	-	28,677	15,980
Household Support Fund		-	20,250	20,250	-
Covid grants		-	-	-	69,000
		<u>217,895</u>	<u>66,750</u>	<u>284,645</u>	<u>316,566</u>
Other income					
Employment allowance		5,000	-	5,000	4,000
Interest income		1,953	-	1,953	233
		<u>6,953</u>	<u>-</u>	<u>6,953</u>	<u>4,233</u>
Total Income		224,848	66,750	291,598	320,799
Expenditure					
Rent		3,233	-	3,233	5,817
Insurance		1,093	-	1,093	1,105
Café expenditure		17,980	1,304	19,284	10,649
Salaries		145,523	14,718	160,241	127,096
Social security		11,142	-	11,142	8,216
Pensions		2,946	-	2,946	2,288
Telephone and internet		213	1,340	1,553	1,642
Post printing and stationery		3,630	1,125	4,755	4,185
Advertising and marketing		1,890	1,104	2,994	4,761
Travelling		1,966	-	1,966	1,173
Hub activities expenditure		17,726	7,846	25,572	13,624
Wetherby hub expenditure		-	-	-	-
CIN gardening expenditure		-	21,862	21,862	33,422
Computer equipment and consumables		6,721	-	6,721	12,804
Cleaning		-	-	-	-
Covid expenditure		-	120	120	12,346
Subscriptions		206	-	206	188
Sundry expenses		5,400	-	5,400	591
Training		4,441	-	4,441	1,149
Accountancy fees		2,580	-	2,580	2,400
Bookkeeping		2,573	-	2,573	2,153
Legal & professional fees		2,165	450	2,615	2,821
Donations		700	2,000	2,700	-
		<u>232,128</u>	<u>51,869</u>	<u>283,997</u>	<u>248,430</u>
		(7,280)	14,881	7,601	72,369

Balance Sheet

Bank charges	635	-	635	410
Interest on taxation	-	-	-	25
	635	-	635	435
Net Profit	(7,915)	14,881	6.966	71,934

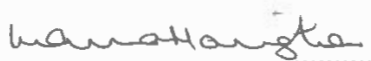


Notes to the Accounts

BALANCE SHEET AS AT 31 MARCH 2023

	Notes	£	2023 £	£	2022 £
FIXED ASSETS					
Tangible fixed assets				-	-
Current Assets					
Debtors and prepayments	5	2,587		1,436	
Cash at bank and in hand		<u>356,885</u>		<u>358,784</u>	
		359,472		360,220	
Current Liabilities					
Creditors	6	<u>4,568</u>		<u>12,282</u>	
NET CURRENT ASSETS			<u>354,904</u>		<u>347,938</u>
NET ASSETS			<u>354,904</u>		<u>347,938</u>
FUNDS					
Restricted funds			174,850		159,969
Unrestricted funds			<u>180,054</u>		<u>187,969</u>
			<u>354,904</u>		<u>347,938</u>

Approved by the trustees on
and signed on their behalf by:



N. HARRINGTON
Vice-Chair of the Trustees

Date : 17.10.2023

Notes to the Accounts



NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2023

1. ACCOUNTING POLICIES

a. **Basis of preparation of accounts**

The accounts have been prepared under the historic cost convention and in accordance with applicable accounting standards and follow the recommendations in 'Accounting and Reporting by Charities' (SORP).

b. **Income**

Grants receivable are accounted for on receipt, unless the period to which they relate is specified by the funder, in which case they are applied to the appropriate accounting period and that part of the grant relating to a future accounting period is included in deferred income. Voluntary income and donations are accounted for as received by the charity.

c. **Resources expended**

Resources expended are recognised in the period in which they are incurred. Resources expended include attributable VAT which cannot be recovered.

d. **Unrestricted funds**

Unrestricted funds are donations and other incoming resources receivable or generated for the objects of the charity without further specified purpose and are available as general funds.

e. **Restricted funds**

Restricted funds are those funds which are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Notes to the Accounts

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2023

2. NET OUTGOING RESOURCES FOR THE YEAR

The net outgoing resources for the year are stated after charging:

	2023	2022
	£	£
Accountancy	1,935	1,800
Independent Examiner's fee	645	600

3. STAFF COSTS AND NUMBERS

Staff costs were as follows:-

	2023	2022
	£	£
Wages and salaries	160,241	127,096
Social security costs	11,142	8,216
Pension contributions	<u>2,946</u>	<u>2,288</u>
	<u>174,329</u>	<u>137,600</u>

The average weekly number of employees during the year, was as follows:-

	2023	2022
Charitable work – activities for the elderly	10	9
Administration	<u>-</u>	<u>-</u>
	<u>10</u>	<u>9</u>

All staff members do their own administration.

4. TRUSTEES

No remuneration or expenses were paid to trustees in the year.

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2023

5. DEBTORS AND PREPAYMENTS

	2023	2022
	£	£
Prepayments	2,571	1,425
Other Debtors	<u>16</u>	<u>11</u>
	<u>2,587</u>	<u>1,436</u>

6. CREDITORS

	2023	2022
	£	£
Trade Creditors	1,891	9,808
Accruals	2,677	2,474
Deferred Income	-	-
	<u>4,568</u>	<u>12,282</u>

7. ANALYSIS OF NET ASSETS BY FUND

	Unrestricted Funds	Restricted Funds	Total
	£	£	£
Current assets	184,622	174,850	359,472
Current liabilities	<u>(4,568)</u>	-	<u>(4,568)</u>
	<u>180,054</u>	<u>174,850</u>	<u>354,904</u>

8. MOVEMENTS IN FUNDS

	Balance 1 April 2022	Movement in Resources		Balance 31 March 2023
	£	Incoming £	Outgoing £	£
Children in Need Gardening Scheme	22,622	-	22,622	-
Dementia Café (was Meet up Monday)	44,368	46,500	5,065	85,803
Household Support Fund	-	20,250	5,300	14,950
Covid	<u>92,979</u>	-	<u>18,882</u>	<u>74,097</u>
Restricted Funds	159,969	66,750	51,869	174,850
Unrestricted Funds	<u>187,969</u>	<u>224,848</u>	<u>232,763</u>	<u>180,054</u>
	<u>347,938</u>	<u>291,598</u>	<u>284,632</u>	<u>354,904</u>

9. INDEMNITY INSURANCE

Indemnity insurance has been purchased to protect the charity, trustees and officers from loss arising from the neglect or default of the trustees or officers.

Corporate information

Wetherby in Support of the Elderly (WiSE)
(A charitable incorporated organisation).

Principal address:

The One Stop Centre
Westgate
Wetherby
LS22 6NL

Telephone 01937 588994

Website www.w-ise.org.uk

Registered charity number- 1163698

Trustees

The charity trustees are appointed as and when appropriate by the body of trustees in office. The trustees who served during the period and those currently in office are:

Mark Storey (Chair)
Caren Rowe (Treasurer)
John Wardley
Norma Harrington
Michelle Atkinson
Jacquie Clarke

Chief Operating Officer

Mark Dobson

Independent Examiner

GL Barker & Associates,
47-49 Austhorpe Road,
Leeds,
LS15 8BA

Bankers

Barclays Bank
24/26 Market Place
Wetherby
LS22 6NF

Yorkshire Building Society
12/14 High Street
Wetherby
LS22 6LT





Thank You

The trustees would like to offer their thanks, again, to everybody who has supported the organisation either through volunteering, offering their valuable time and skills or through invaluable financial support.

We remain as committed as ever to supporting older people in Wetherby and our surrounding communities.

Thank you!

WETHERBY IN SUPPORT OF THE ELDERLY

England & Wales - Charity number 1163698

Accounts

Annual Report and Accounts 2021-22



Contents

3	Chair's Introduction
3	Trustee's Report
5	A Message From Our Chief Operating Officer
7	Strategic Report Our Strategy for 2022/23
8	Achievement and Performance for 2021/2022
9	Other Matters of Significance During the Reporting Period
10-11	Our Activities
12-13	Information and Advice
14-15	Transport
16-17	Befriending
16	Grass cutting
18-19	Volunteering
20	Send a Smile
21	Consultation
22-25	Governance Structure and Management
26	Financial Review
27	Independent Examiners Report
28	Statement of Financial Activities
29	Balance Sheet
30-32	Notes to the Accounts
34	Corporate Information

Chair's Introduction:

Our role as trustees is to ensure the charity is doing what it says it will, delivering on its promises and meeting its objectives.

This report is the perfect illustration of that endeavour, as we seek to bring together and reflect on the charity's work over the last 12 months and assess its performance against the targets it sets itself.

As trustees, we are consistently in awe of the contribution staff and volunteers alike make to the lives of older people in Wetherby and its surrounding areas.

For a small charity, we are proud of the impact we are able to make with the relatively small resources available to us, but none of it would be possible without the passion and generosity of the people behind many of the programmes, projects and activities you will read about in this report.

Whilst an annual report is a good opportunity to look back on all that has been achieved, the trustees and I are also excited to learn more about the charity's plans for the future- with promising plans in place to extend its reach and enhance its offer already well under way.

Mark Storey
Chair of Trustees.



Trustee's Report:

The trustees present their Annual Report together with the Financial Statement of the charity for the year 1 April 2021 to 31 March 2022.

The trustees confirm these documents comply with the current statutory requirements, the statutory requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) as amended for accounting periods commencing from 1 January 2016.



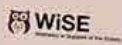
Community Care Hub

Recognising the
outstanding
contribution of

WISE

March 2020 - March 2022

For supporting their local community
during the Covid pandemic
as a Community Care Hub



A message from our Chief Operating Officer:

Welcome to our Annual Report 2021/22 and how nice it is to be summarising a year in which we were able to restore so many of our core services and at last begin to look towards a post-pandemic future.

Of course, Covid-19 has still been a key consideration for us as a charity- but it has not dominated our work in the same way it did during the previous reporting period.

We know the vital role our work plays in helping isolated, older people in our area to live healthy, fulfilling and independent lives, so it's been heartening to meet our friends face-to-face again as part of a fully restored events and activities programme.

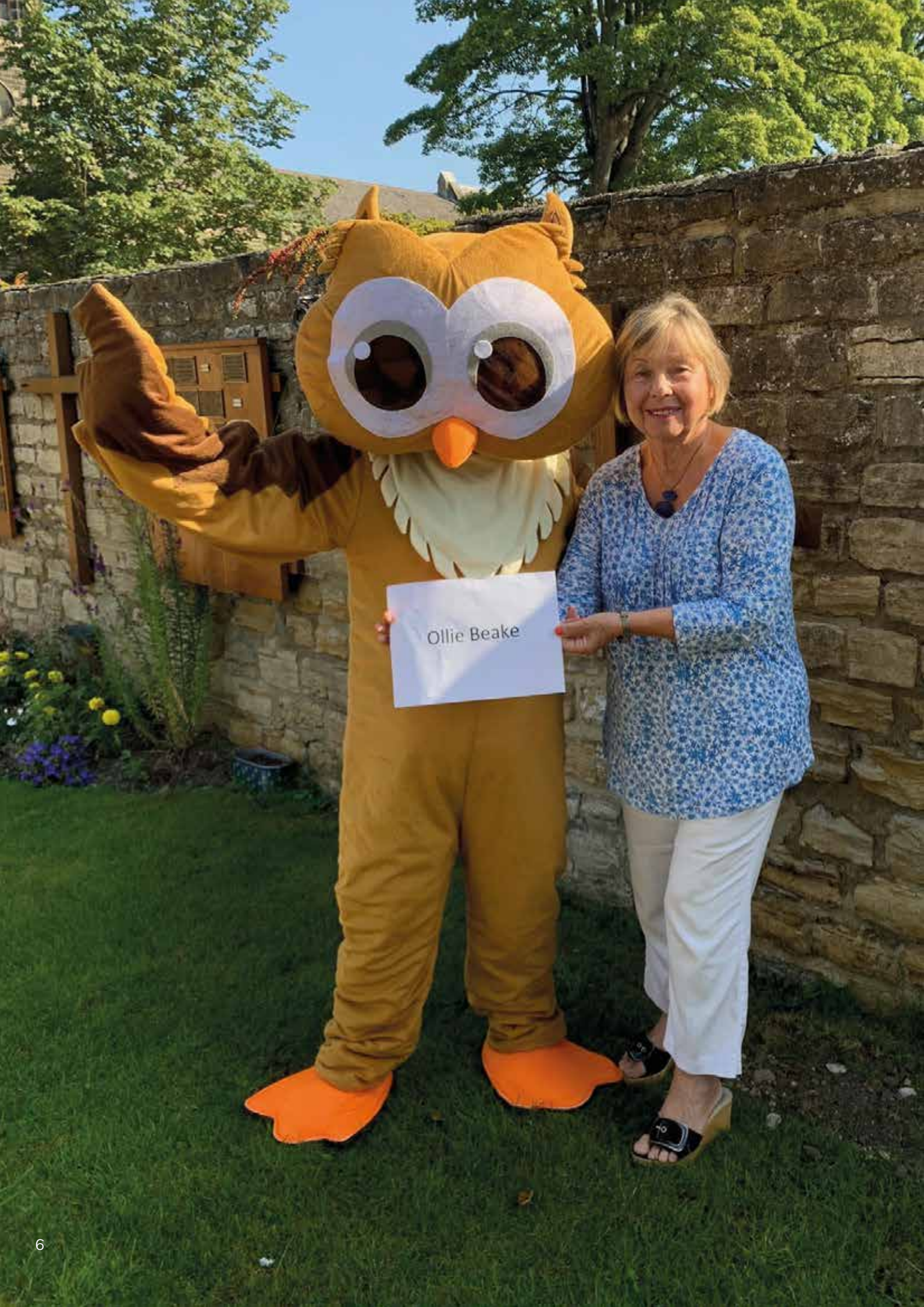
We've not stood still either.

Whether it's the introduction of our already successful 'Send A Smile' postal scheme, or extending the reach of our work into new locations, 2021/22 can also be remembered as a year in which we broadened our horizons.

This brave new outlook also saw us open up a big conversation with our communities about what they want from us in the future- the results of which you'll find elsewhere in this report.

Of course, none of our work would be possible without the help of our staff, volunteers, fundraisers and partners. At the end of another busy period for the charity- we salute them all.

Mark Dobson
Chief Operating Officer
WiSE



Strategic Report

Our Strategy for 2022/23

In 2022/23 we will continue to adapt and extend our services to adapt to local requirements.

We will continue to focus on the provision of much needed services for older people who live in Wetherby and its surrounding villages. We aim to do this to ensure older people are supported to retain their independence and continue to live active lives within their community.

Through the implementation of our strategic framework, we are challenging ourselves to improve our services to be first-class and in high demand, so that the health and wellbeing of those we support is truly enhanced.

Our strategic framework is made up of five core aims:

Continual development of our performance to deliver our operational aims

We are outcome-focused and constantly keep our services under review to ensure they reflect best practice, changing demand and to ensure our services match the needs of our clients, commissioners and broader health and wellbeing agenda. Our services have clear objectives. We set and measure these using evidence.

Reflective practices and monitoring practices are in place, including performance appraisals and review. Our database is kept under review to ensure data capturing is up-to-date, robust and accurate.

Statutory and regulatory requirements are understood, implemented and complied with.

To provide safe and secure services for our client base

Policies and procedures are in place for safeguarding, with a strong focus on adult and child risk, and these are reviewed regularly.

Policies and procedures are in place to ensure we operate within a safe work space and we employ safe working practices and these are reviewed regularly.

Information and data is stored securely in line with regulatory requirements.

An appropriate risk management framework is in place.

To be well led

We are up-to-date with our policies and procedures and ensure these are adhered to. We have effective management systems including a robust trustee body and a management structure that feeds in to the trustees.

Managers proactively support a positive culture which is person-centred for staff, volunteers and the people we support. It is open, inclusive and empowering.

Governance structures are clear and transparent, clearly documented and are regularly implemented and reviewed through meetings.

Current legislation and regulations are complied with.

To be effective in our strategic and operational aims and objectives

We ensure our services are reviewed to reflect our clients' needs.

We have the correct number of staff and amount of staff knowledge to undertake strategic and operational requirements.

Changes in need and local priorities are identified and responded to.

We work effectively with other agencies and our commissioners. We are inclusive and accessible to all within our client base.

To engage with our friends to ensure they are involved with our services to help steer the organisation

We engage with our clients in a variety of ways and ensure they are involved in our work.

Our client base is given opportunities to be involved with the delivery and changing nature of our services. We listen and act upon client feedback.

Through our policies and procedures, our client base and others know how to complain or pass compliments to the service to help steer client involvement and service delivery.

Achievements and Performance 2021-22

What did we say?	What did we do?
We would continue to monitor and evaluate our services and activities and respond to need.	We have continued to expand our services during the reporting year, including adding many new permanent and one-off fixtures to the WiSE activities calendar. We've also spread our geographic footprint much further into villages such as Walton. In addition, we have undertaken a significant consultation exercise with the public to understand the kind of services they wish to see us progress in the future.
What did we say?	What did we do?
We will continue to increase our fundraising and community activities to secure the future of our provision.	We have raised a significant amount of external funding this year, thanks to our new corporate fundraising role. This will enable us to relaunch one of our most costly activities - the 'Meet Up Monday' memory café - in spring 2022. We have also increased our community fundraising opportunities significantly. For example, we asked the community to make Christmas and Easter products which are sold to generate funds to support the work we do.
What did we say?	What did we do?
We would continue to improve our profile within the community.	We have continued to significantly raise our profile both on broadcast media, printed journalism and our social media footprint, which has increased pointedly within the last 12 months. In this reporting period, 29 news releases were distributed and there were 111 pieces of press coverage in print, online and broadcast media.
What did we say?	What did we do?
We would increase our volunteer base and offer wider opportunities for volunteers.	We have added the new role of a Fundraising and Volunteer Coordinator to draw in new volunteers and ensure they are matched to an appropriate service area/s. Our volunteers are at the heart of everything we do. Our new Coordinator continues to ensure opportunities are increased through the provision of adequate training packages and an increased emphasis on volunteer communication.
What did we say?	What did we do?
Ensure the charity meet the high standards listed in The Charity Governance Code.	Our trustees meet regularly and make sure the chief operating officer is working within the remit laid down by the organisation, ensuring our ethics and values are achieved and that we are working in line with our strategies. As an organisation we ensure these essential checks and balances are in place and that all our staff and volunteers are working to the highest possible standards reflecting the code of governance at all times.

Other matters of significance during the reporting period

The year 2021-2 was much more positive than 2020 for everyone - there was light at the end of the pandemic tunnel. For WiSE, 2021 was a year of two halves.

The first half saw us continuing to work as a Covid-19 hub for North East Leeds. We also assisted with the vaccination rollout, made wellbeing calls, and conducted telephone befriending sessions.

The second half of the year saw us restarting our key services in a safe and controlled way, starting with the WiSE Owl Café at Boston Spa Village Hall. Our activities timetable relaunched, along with our Grass Cutting, Transport and Information and Advice schemes.

During the reporting period (1 April 2021 to 31 March 2022), we:

- Served 5,370 visitors to the WiSE Owl Café.
- Staged 245 social activities, from chairbics, aerobics and line dancing to knitting, crafting, music sessions – and even a Mad Hatter's Tea Party!
- Hosted events in 5 different venues across Wetherby, Boston Spa, Walton, Thorner and Bramham.
- Arranged for 60 people to have their grass cut each month.
- Made 312 transport journeys, whereby our volunteers drive older people to activities or social engagements they would otherwise not have been able to attend.
- Ensured 153 people received contact from a friendly caller or visitor.
- Administered 687 contacts via the Information and Advice service.
- Supported 11,783 older people since April last year.

Towards the end of the reporting period, we launched a new postal scheme- 'Send a Smile'- as a way of further extending our work to reduce isolation and loneliness amongst older people. The scheme is only in its infancy, but already hugely successful. WiSE also welcomed a new mascot to the team - Ollie Beak - who makes regular appearances at activities and events.

We were able to fund projects for some of our partners' community initiatives. The spring course of Wetherby Man With A Pan – which aims to get kitchen shy older men cooking - was hugely successful, featured on BBC Look North and was broadcast on BBC Radio Leeds. We also contributed to Bramham Village Hall's Christmas Day lunch, which was put on for older people who would otherwise have spent Christmas Day alone.

We are proud to be recognised for our outstanding contribution in supporting our local community during the pandemic as a Community Care Hub by Leeds City Council and Voluntary Action Leeds. We were also nominated for the Community Project of the Year at the Compassionate City Awards, again for our community work during the pandemic.

We have undertaken a significant consultation exercise with the public to establish the kind of services they wish to see us progress, in the wake of services we provided during the Covid-19 lockdowns. The outcomes of this can be found elsewhere in this report.

Finally, in July we were proud to welcome Michelle Atkinson as our fifth trustee.

Our Activities - An overview

We carry out a wide range of services and activities in line with our charitable objectives. The trustees consider that these services and activities provide benefit to the area's older people and their carers.

Our activities and services are promoted in a variety of ways. We actively engage with local parish councils and community groups and more than 550 newsletters are sent out each month, via e-mail, post or hand.

Our in-house communications officer provides publicity material to the media in Wetherby and Leeds and we continue to advertise in parish magazines. We display information on our services at GP surgeries, local churches, Wetherby Town Hall, and the One Stop Centre. We also promote our events and activities on our website and social media platforms.

We have launched 8 new regular activities this year- some in areas outside of Wetherby, including Boston Spa, Bramham, Thorner and Walton.

WiSE Owl Café

The café is based in Boston Spa Village Hall and is now in its ninth year. It is still a popular event, acting as a regular meet up for many of our customers. The café has two part-time staff members supported by a dedicated band of volunteer servers and bakers. It sources its food from local suppliers and volunteer bakers make the delicious cakes and scones.

Chairobics and Aerobics

Chairobics and Aerobics are offered weekly. It is a popular activity with between 30 and 40 people attending regularly - enabling people to interact in the community and thereby reducing social isolation.

Line Dancing

Line dancing promotes balance, coordination and is an excellent cognitive exercise which is relevant for our target age. The session leader is very popular with our clients, and provides weekly dances to keep our regulars in practise.

WiSErcise (new)

WiSErcise was launched in October 2021 and takes place every Tuesday at Boston Spa Village Hall. It takes the form of gentle chair based exercise and has become extremely popular. We're particularly grateful for the support of class instructors from Funky Jives and Home Instead.

Move & Groove (new)

Move & Groove launched in March at Walton Village Hall. It is a fun, informal dance class with an instructor from Funky Jives, who teaches everything from Salsa to Bollywood, Disco to Freestyle and anything in-between.



Elderberries

Elderberries is a monthly social gathering which takes place at St Joseph's Village Hall. All friends and carers are welcome to attend Elderberries, where they are entertained by professional musicians or local entertainers.

Boston Spa Social / Bramham Social / Thornberries (new)

Boston Spa Social, Bramham Social and Thornberries have been launched to bring a social gathering like Elderberries to Wetherby's surrounding villages – extending our geographical reach. They are on an ad-hoc basis.

Knit, Natter, Craft & Chatter (formerly Knit One Purl Wise)

Knit, Natter, Craft & Chatter is held every Thursday at Boston Spa Village Hall. Every week there is a new craft theme and people are also invited to bring their own project. The event is increasing in popularity.

Bingo & Fun (new)

Bingo & Fun launched in November and involves bingo, games and quizzes along with prizes for the winners. It runs from November to April.

WiSE Warblers (new)

WiSE Warblers is a new monthly event which launched in March, and sees singers from Singtasia host an informal singalong and chat.

Walton Coffee Morning (new)

This event is held on the first Monday of every month, at Walton Village Hall. Everyone of all ages are welcome.

Ad hoc events and celebrations

From time-to-time we host events to acknowledge national celebrations. In October we hosted a Mad Hatters Tea Party to celebrate Mad Hatter Day. This involved fancy dress, afternoon tea, cakes, plus a live magician. In December, we hosted three Christmas Parties in Wetherby, Boston Spa and Bramham, with entertainment, festive refreshments and prizes.

Partnerships

The trustees are particularly grateful to our community partners for all their support. All have helped us to meet our objectives and benefit older people and their carers in our area. We are especially grateful for the support of Boston Spa Village Hall. The venue is home to our much-loved Wise Owl Café. The hall actively supports WiSE and provides a venue for many of our activities.

Other local partnerships include:

- St Joseph's Church
- The Methodist Church in Wetherby
- The Engine Shed, Wetherby
- Bramham Village Hall
- Walton Village Hall
- Thorner Over 55s Club
- Churches Together
- Wetherby District Lions Club
- Wetherby Runners
- The community committee
- Voluntary Action Leeds and Doing Good Leeds
- Local primary care team/NHS, Outer North East community committee
- Wetherby Co-operative
- Morrisons Wetherby
- Home Instead Wetherby and North Leeds
- Wetherby Racecourse

We welcome local groups, whether small and informal or larger in size, contact us on activities@w-ise.org.uk.



Information and Advice

This service provides information and advice to over 60s on a range of issues, including how to apply for allowances and benefits, support for people with form filling, guidance on finding trusted tradespeople or carers and directing clients to appropriate support services and organisations.

We have an experienced and knowledgeable Information and Advice Coordinator based at our Wetherby offices, but who also provides a roaming service at local venues.

From April 2021 to March 2022 there were 687 Information and Advice telephone contacts with friends, family/carers and organisations such as Linking Leeds.

More than half of these contacts resulted in signposting / referral to appropriate organisations and sources of support, including Department for Work & Pensions, Leeds City Council and Leeds Directory.

Almost 50 clients received intensive one-to-one support, which included completion of 45 forms, from bus passes to care ring pendant alarm applications.

The Information & Advice service also completed 20 blue parking badge applications and filled in 17 attendance allowance forms using a telephone appointment service.

During the reporting period, there were 135 new referrals to WiSE, which came from NHS health practitioners, friends, family and carers and Linking Leeds amongst others.



Information & Advice – a case study - Mrs. A

Mrs A is an 88-year-old lady who lives independently and alone. We received a request from a Leeds City Council retirement life warden to help with her blue badge application and to assist with her higher rate Attendance Allowance application.

What we found:

- Mrs. A is registered with sight impairment
- Mrs. A was not able to make an online application without assistance, causing stress, hardship and isolation.

What we did:

- We phoned Mrs. A and explained the application process and steps needed to achieve the desired outcome.
- We copied the appropriate documents during the application process to provide supporting and documentary evidence.
- We filled in the online forms on behalf of Mrs A. for her Blue Parking Badge and higher rate Attendance Allowance application, both by pre-arranged telephone appointments.
- Both applications were successful and are now in place and in use.



Transport

The Transport Scheme provides a low cost door-to-door pick up and drop off service for people over 60 who are less mobile, don't drive, or struggle with public transport. The scheme has been running for seven and a half years and is greatly valued by our friends.

The service – which operates in Wetherby and surrounding areas – has a number of trusted volunteer drivers who will collect a service user and drive them to GP and local healthcare appointments, WiSE activities, or to meet up with friends.

Journeys are offered Monday to Friday 8am to 6pm and all bookings are made through our transport booking line. The service is more cost effective than taxis. It costs £2 per journey, plus 45 pence for every mile travelled, which is paid for at the destination. Drivers are able to accommodate fold-up rollators or walking sticks, but unfortunately can't take wheelchairs.

During the reporting period, 312 transport journeys have been completed, whereby the charity's volunteers drive older people to activities or social engagements they would otherwise not have been able to attend.



Transport – a case study - Josie

Josie, aged 86, is driven by volunteers to friendly meet ups, social events and charity activities thanks to the Transport Service.

What we found:

- Josie is no longer able to drive
- Josie lives alone
- Josie felt lonely and isolated due to these factors.

What we did:

- Registered Josie on the Transport Service
- Arranged a volunteer to pick her up from home, take her to an event, and drop her off home again, when required.

Josie said:

“

This service means I can get out and see people and I can also attend the regular activities WiSE put on. The volunteers are so reliable, caring and helpful.

“I wouldn’t be able to cope if I couldn’t get out of the house. This service means I can see friends and spend time being social – and enjoying life. It would cost a lot more to have to get taxis. I’m very grateful for the service and don’t know what I’d do without it.

”

Befriending

Our befriending service matches an isolated older or vulnerable person living alone with a volunteer who gives up their time to regularly provide friendly conversation and companionship.

Where possible, matches are made based on shared interests and both parties living in the same area. Once a befriending match has been made, each person is introduced in the company of one of our Coordinators.

We have a team of 30 befriending volunteers who come from all walks of life and are asked to commit to a minimum of one hour a week, which involves dropping in for a cup of tea and a chat.

In the last year, our volunteers made, on average, more than 850 befriending visits and calls to our older friends.

For an older person, regular social interaction helps to break their feeling of isolation and helps to make them feel a part of the community.

For the volunteer, the visits are often satisfying, enjoyable and an opportunity to meet someone new to hear about their stories and experiences.

Grass Cutting

WiSE has a long standing partnership with Children In Need (CIN) and Wetherby Young Offenders Institute (WYOI) to provide a grass cutting service for older people who find it difficult to maintain their lawns.

Once we identify older people in need of help, WYOI provide a trained horticulturist to supervise young offenders who have expressed an interest in developing horticultural skills.

The gardeners have all been risk assessed for suitability to earn Release or Temporary Licence before they take part in the project. The aim is for them to use this work experience to go towards a relevant qualification, giving

them a greater chance of future employment.

The scheme helps to improve relationships between young and older people and is greatly valued by those who use it.

The scheme is only one of its kind in the country. It was granted a 'Connecting Communities Award' for the impact it has made so far.

The grass cutting scheme resumed in June 2021 following the third Covid-19 lockdown. Since then, 60 people have had their grass cut each month.

Befriending- a case study - 'Winn and Hazel'

Hazel rang Winnifred once a week during the dark days of lockdown, as part of our Befriending Scheme.

What we found:

- Winn lives alone due to the sad passing of her husband many years ago
- The winter lockdown was difficult for her, as WiSE activities were suspended.

What we did:

- Set Winn up with a weekly telephone call with befriending volunteer, Hazel.
- This helped give her week some structure and a break from watching the TV

Winn said:

“

The winter lockdowns were difficult because of the weather, and WiSE had to suspend its usual activities. I found it very boring, but tried to keep busy reading, watching TV and sorting out cupboards. It was nice to hear Hazel's friendly voice and give me a break from watching the TV. It was great that we were able to form a friendship without even meeting.

”

When restrictions were lifted, Hazel and Winn were able to meet in person, and are now firm friends.

Hazel said: “Winn is interesting, resilient, positive and always looks on the bright side of life. When I met her, she was exactly as I had imagined. We gave each other a big hug and it was a real treat to sit down with her and have a coffee and have our first face-to-face chat.



Volunteering

We actively recruit volunteers over the age of 16 to assist in the delivery of our services. Volunteering is a worthwhile and enjoyable activity and there are a wide range of opportunities with us. Our Volunteer Co-ordinator is based at our Wetherby offices and welcomes enquiries from people who want to support those in the local community. All volunteers undertake an induction and receive training appropriate to their role.

Volunteers are vital to our success. Without them we could not continue to develop our services and programme of events. Their help in delivering our services, through roles such as activity helpers, befrienders, drivers, fundraising, and trusteeship means we can continue our much needed work.

At the end of the reporting period, we had 130 volunteers across our programmes. The volunteers range from younger people to very senior adults. Our Volunteer Coordinator is working hard to improve our support through training, recognition and communication. We are also continuing to develop additional volunteering opportunities.



Volunteering - a case study - Jackie

Jackie is about to celebrate her seventh anniversary as a WiSE volunteer and says the best bit about her role is knowing the difference she makes to an older person's life.

Jackie said:

“

I started to volunteer for WiSE in April 2015 at one of the regular memory café meets. I was very nervous, but the other volunteers and the Events Coordinator made me feel very welcome.

“I decided to volunteer as I was a senior care assistant looking after older people in a care home. I loved the job and when the home closed, I missed working with the residents. So when I retired and had more time, I saw an advert for volunteers within WiSE and here I am years later.

“The thing I like most about volunteering is helping people who are sometimes forgotten about, and to make them feel that somebody does care - and to stop them being alone. I enjoy volunteering for all the service areas of WiSE, but particularly the events, which are all so different.

“WiSE is a great charity which supports the older community. You only have to listen to the people around Wetherby to know that it is doing a good job

”



‘Send a Smile’ Scheme

The ‘Send a Smile’ scheme launched in February and is still in its infancy, but has already gained huge popularity with the community and benefits for older recipients.

The scheme was launched as a way of further extending the charity’s work to reduce isolation and loneliness in older people.

It is also designed to build new and lasting two-way community relationships, including between organisations like care homes, craft groups and schools. It complements the existing Befriending Scheme for people who live alone and promotes positive intergenerational interactions by establishing partnerships with schools and colleges.

‘Send a Smile’ encourages people of all ages, across the region and afar, to submit postcards, pictures or hand drawn cards to make an isolated, older person smile. Cards are sent to the WiSE offices where they are then distributed to our friends.

So far, we have received 121 cards, letters and postcards which have made 121 older people’s day. We will be developing this service further in the next reporting period.



“

Last Saturday was my birthday and a very elaborate card which must’ve taken ages to have been made with an accompanying message was delivered to me. As someone who is old and sometimes lonely this card was appreciated.

Send a Smile recipient.

”



Consultation

When the pandemic first took hold, Community Care Hub arrangements were put together very quickly and WiSE became the 'hub' for Outer North East Leeds.

Since then, the arrangements in each ward have become appropriately customised to local need and the centralised role has become focused on providing advice, resources and referrals.

The tangible success of this model and the longer term benefits of these localised arrangements are clear and there is growing interest and commitment to maintaining this approach post-pandemic. There has been national recognition of the work undertaken in Leeds and discussions about how it can be adopted in other areas.

To determine our community's thoughts on this, we were given funding to determine the needs of our community, with a view to potentially delivering against these needs in the future.

What we did

We developed a short survey for people of all ages to 'have their say' on services in the local area. The questionnaire also asked for demographic information such as sex, age, and location, but no personal details. It was available to fill in in-person, or online through the website.

WiSE also gave the community the opportunity to fill these in at three family fun consultation events in December and January, in Wetherby, Boston Spa and Walton. WiSE's activities are predominantly for the over 60s and their carers, so family focussed events meant we would get a wider range of people responding.

We also produced other marketing material to promote the consultation, including posters, pull-up banners and a social media advertising campaign.

Findings

More than 100 people filled in the survey. It found:

Three quarters (75%) of our consultation respondents had accessed the services of a charity or community organisation. A third (33%) said they accessed these services some of the time, with just over one in ten respondents (14%) always accessing them. A quarter of respondents (25%) had never used the services of a charity.

Most respondents (37%) told us that the council and other publicly funded organisations should provide services for people in our area, closely followed by community groups (30%). One in four respondents (27%) said charities should provide services. Other responses ranged from neighbours, family members

and local volunteers, to religious institutions like churches. Some commented to say that proper integration between local authorities, charities and voluntary groups would achieve the best results for local people.

Nearly a third of respondents (29%) told us that they or someone they knew would benefit most from additional social events and activities in their area. One in five people (20%) said they would welcome more information and advice, with slightly fewer (17%) suggesting improved transport services. Befriending (16%) and shopping or prescription deliveries (12%) were the other service areas listed in the survey.

Dementia support, walking groups, hobby register, a support group for young parents and mental health support for people of all ages were amongst the other services put forward by respondents.

Several people used the comments box to raise concerns about public transport options in the area, whilst one respondent requested help for older people to access cash.

A large proportion of respondents put forward further views about the support available to people of all ages in their area. Several people said access to healthcare was a problem where they lived, with access to GP appointments amongst their main concerns.

Various people put forward suggestions around additional hobbies, activities or events- with music events amongst the most popular suggestions. Some suggested coordination between different agencies could be improved. Several respondents commented on their satisfaction with the services which WiSE provides, with some saying they needed communicating more widely to ensure as many people as possible knew how to access them.

A very large number of respondents told us they had accessed services provided by WiSE- whether it was attending the café in Boston Spa or dates on the charity's activities and events programme. Of these respondents, all reported a positive experience with several commenting positively on the social interaction and the opportunity to meet friends.

Some people said they used services provided by other charities or community groups, including the Women's Institute, church and local exercise groups. All of these services received positive feedback.

How we will implement our findings

In the new financial year, we will present these findings to the local authority for their feedback and implementation.

Governance Structure and Management

Our constitution

WiSE is a Charitable Incorporated Organisation (CIO). It is governed according to a Charity Commission Foundation Model Constitution dated 22 September 2015 and is therefore detailed and fit for purpose and protects the continuation of the charity.

Our objective

The objectives of the CIO are all for the public benefit.

Chiefly, our aim is to support older people, and those who care for them, who live in the Wetherby area (Wetherby, Linton, Boston Spa, Thorp Arch, Walton, Clifford, Bramham, East Keswick, Harewood, Collingham, Bardsey, Scarcroft and Thorner) and who are socially isolated, or living with chronic or degenerative conditions, so that they can retain their independence and continue to live active lives within their community.

Public benefit

In planning our activities, the trustees consider the specific objectives of the charity, along with our vision, mission and values. We review our aims, objectives and activities annually. As part of that process, we consider the outputs of our activities, assess the benefit of those outputs on the lives of older people and develop future activities to make sure our work continues to deliver the most benefit against our charitable objects.

This report contains more information on the way our work has benefited older people over the last 12 months, measured against objectives set at the beginning of the year.

The trustees confirm they have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Activities

This is our 19th year supporting Wetherby's older people. During that time, we have seen our organisation grow, both in terms of services we provide and the requests for help we receive. It is a well-known fact that older people are living longer and need more support to enable them to live a comfortable and independent lifestyle and through our range of activities and services we aim to make this happen.

We want to place WiSE at the heart of its community. To do this effectively we continually monitor and evaluate the services and activities we provide to ensure they meet the needs of our friends and their carers. Our current provision includes:

- Befriending
- Information and Advice
- Transport Scheme
- Grass Cutting
- Send a Smile Scheme
- The WiSE Owl Café
- Chairobics and Aerobics
- Line Dancing
- WiSErcise
- Move & Groove
- The Elderberries
- Boston Spa Social
- Bramham Social
- Thornberries
- Craft & Chatter
- Bingo & Fun
- WiSE Warblers
- Walton Coffee Morning

The schemes are co-ordinated by a team of staff, with a large amount of work is carried out by volunteers - currently numbering around 130. These volunteers work in many different roles in the community, support roles or directly with friends- not only making many of our schemes possible by giving their time freely, but also bringing a true community perspective.

All our work is based on supporting the wellbeing of older people in Wetherby and surrounding area. This means we help people to stay safe, well and live independently in their community for as long as possible.

We had more than 11,500 contacts with friends and their families during the reporting period. We also received at least 135 new formal referrals- with the number of informal referrals likely to be higher.

Whilst these numbers illustrate our activity levels, they do not reflect the significant positive ripple that comes from many actions, bringing additional benefits to our friends, their family, wider networks and community and this is something we are looking to measure in the future. The social benefit that WiSE brings is without question, but as yet we cannot attribute a value to that benefit and this is something we wish to be able to do.

We are committed to collaborative working and this continued in 2021/22 with renewed partnerships with voluntary, statutory and private sector organisations, all of which were focused on promoting and supporting the welfare of older people living locally. Adopting a joint approach means we can keep our friends and their families as the focus of our attention when designing and delivering new services.

Governance and management

The overall management and control of the charity rests with the individual members of the board of trustees who give their time freely and receive no remuneration or other financial benefits. The charity's trustees meet in accordance with the constitution which requires the presence of at least two or, if greater, a third of its members to be quorate. The Board may appoint a chairperson and revoke such appointment at any time. All business is decided by a simple majority, each trustee having one vote. In the event of an equality of votes, the chairperson of the meeting has a second or casting vote. The trustees are responsible for decisions taken in relation to the strategic running of the charity, but the day to day running of the charity is delegated to staff.

Trustee committees

The trustees delegate responsibility for more detailed consideration of the charity's affairs to four sub groups, each including at least two places for trustee members, chaired by a trustee and reporting to the board of trustees. These subgroups are:

- Finance
- HR and Policies
- Strategy and Service Development
- Fundraising and Marketing

Recruitment and appointment of new trustees

The existing trustees are responsible for the recruitment of new trustees. The trustees undertake a skills audit which identifies specific skills needed to enhance the existing board. In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO. In addition, individuals who apply to become trustees must demonstrate a personal or professional interest in the care and well-being of older people.

Every appointed trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of trustees. Trustees retiring at the end of their term are eligible for reappointment. A trustee who was served for three consecutive terms of three years may not be reappointed for a fourth consecutive term, but may be reappointed after an interval of at least one year.

There shall be a minimum of four trustees and a maximum of 10. At the end of the reporting period there were five trustees.

Following appointment, new trustees are introduced to their new roles and given a Trustee's Handbook which covers all aspects of the role. This includes a copy of the

Charity Commission's guide 'The Essential Trustee' and copies of the Charity's Governing Document, financial statements and a guide to the policies and procedures adopted by the charity. An induction checklist is included to ensure everything is covered and signed off. All Trustees are Disclosure & Barring Service (DBS) checked and references obtained.

Voluntary support

Whilst voluntary help is not valued for the purposes of the financial statements, we benefit immensely from the services provided by volunteers.

During the reporting period, we had 130 volunteers completing several thousand volunteer hours between them. This volunteer contribution supports all of our schemes as well as support functions and fundraising.

The trustees thank all our volunteers for their continued support. Without their time and skills, our impact would not be as significant as it is.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Strategic risk management is regularly overseen by the board of trustees. There is an overarching risk management policy which involves a regular review of key risks faced by the charity, and setting up systems and procedures to address those potential risks and to minimise any impact the charity if the risks materialise. An annual review of the risk register also takes place.

The trustees also have in place policies addressing the main operational risk areas. The trustees consider the following to be the key risks facing the organisation:-

- Similar to many charities, the main risks facing WiSE are financial, relating to the loss of contracts, a reduction in grant income or a reduction in public donations, thus impacting on income targets. Due to the reliance identified above we need to take account of changing economic, policy and social conditions which may affect individual supporters, corporate donors and statutory and trust funders. These risks are managed proactively through the assessment of new opportunities and existing contracts, planned appeals and continuous review of organisational costs. An appropriate level of funds will be maintained to help mitigate the main financial risks. Additionally, trustees monitor results quarterly and consider the long term impact of emerging trends. They also oversee compliance with fundraising regulation and ensure fundraising is carried out to high ethical standards. We are continuing to invest in income diversification projects to mitigate the risk where possible.



- We recognise the importance of safeguarding vulnerable people in all areas of our work. The charity has a safeguarding policy which applies to all staff and volunteers who have regular contact with older people. This policy is supported by safer recruitment practice and training programmes for staff and volunteers. Although we believe the operational procedures have strong safeguards embedded in them, it remains a key risk on our risk register.
- We recognise the risks associated with information security and the importance of protecting our IT systems from malicious attack and unauthorised access and misuse. Security measures are in place to protect from unauthorised access to IT systems and to test vulnerabilities in the network. We hold a limited amount of personal information about our service users. We have a Data Protection policy in place which ensures only authorised access to personal details and continues to enhance the security of the data in line with best practice.
- We deliver services where they are needed. In all situations the health and safety of our staff, service users and others working with us is a prime concern. A significant proportion of staff and volunteers are lone workers, making visits to a range of locations. The charity has appropriate policies, guidance and training, and any health and safety concerns are reported to the trustees at regular board meetings.

Fundraising

The majority of our voluntary income last year was raised through charitable trusts and foundations which supported our projects and services. A small amount of income came from service users and individuals supporting our work. All our activities deliver on our fundraising promise.

We proactively comply with all fundraising related legislation and marketing regulation. All of our fundraising activity has been led by staff and volunteers.

As part of our approach, policies and standards, we make sure we protect vulnerable people and other members of the public from inappropriate behaviour - we proactively train everyone involved in fundraising, with clear processes in place to monitor and manage every interaction. In the past year, we have not uncovered any failure by staff or volunteers to comply with these schemes and standards and we received no fundraising complaints in 2021/22.

Financial Review



FINANCIAL REVIEW – 1 MARCH 2021 TO 30 APRIL 2022

Similarly to the 2020/2021 Financial Year, COVID restrictions and isolation continued into the 2021/2022 Financial year. Despite these challenges, Wise continues to operate strongly which is reflected in the 2021/2022 Financial Statements.

BANK ACCOUNTS:

The Charity operates three bank accounts being:

CURRENT ACCOUNT:

This account is used to fund the day to day operations of the charity.

ALLOCATED FUNDS ACCOUNT:

Money which is received for specific projects or areas of service are kept in this account. This ensures that the Trustees are able to maintain a clear audit trail of how funds in this account are spent. Records of funds in this account are maintained on a monthly basis.

RESERVE ACCOUNT:

Funds in the Reserve account are maintained in a savings account held with the Yorkshire Building Society. These reserves fulfil the Trustees responsibilities in ensuring that:

- Monies received are used to further the purpose and work of the Charity;
- The Charity is able to meet its long term debts and obligations; and
- The Charity has reserves to enable it to fulfil its legal and statutory obligations if wound up.

The Trustees review the reserve account on an annual basis to ensure that sufficient reserves are held in this account.

FUNDING RECEIVED:

The Charity's principal source of funding is from Leeds City Council Adult Social Care. During 2021-22 Leeds City Council have continued to assist the charity with maintaining assistance and care to our community during the COVID pandemic. The funds were allocated to COVID related activities in our surrounding areas. Monthly records are maintained and are presented to the Accountant for verification purposes.

FUNDRAISING:

Fundraising resumed during 2021-2022, and we thank our benefactors. Without their generosity we would not be able to successfully run our activities and offer support to the elderly in our community.

Independent Examiners Report

WISE – WETHERBY IN SUPPORT OF THE ELDERLY

Independent Examiner's Report to the Trustees

I report on the accounts of the Trust for the year ended 31 March 2022, which are set out on pages 6 to 10.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. [The Charity is preparing accrued accounts and I am qualified to undertake the examination by being a qualified member of The Association of Chartered Certified Accountants]

It is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act;
- To follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5) of the 2011 Act; and
- To state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination was carried out in accordance with General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and the seeking of explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with s. 130 of the Charities Act 2011; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Act have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Graeme Peter Greenfield
G L Barker & Co LLP
Chartered Certified Accountants
49 Austhorpe Road
Cross Gates
Leeds
LS15 8BA

Signed



Date: 29/9/2022

Statement of Financial Activities

WISE – WETHERBY IN SUPPORT OF THE ELDERLY

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2022

	Note	Unrestricted Funds	Restricted Funds	Total 2022	Total 2021
		£	£	£	£
Turnover					
Core funding		139,356	-	139,356	147,716
WISE Café		23,953	-	23,953	5
Hubs activities		3,609	-	3,609	111
CIN Gardening scheme grants		-	40,560	40,560	10,074
Meet up Monday		-	24,108	24,108	50
Donations and grants		15,980	-	15,980	5,059
Covid grants		6,500	62,500	69,000	24,863
		<u>189,398</u>	<u>127,168</u>	<u>316,566</u>	<u>187,878</u>
Other income					
Employment allowance		4,000	-	4,000	-
Interest income		233	-	233	192
		<u>4,233</u>	<u>-</u>	<u>4,233</u>	<u>192</u>
Total Income		193,631	127,168	320,799	188,070
Expenditure					
Rent		5,817	-	5,817	5,600
Insurance		1,105	-	1,105	1,105
Café expenditure		10,649	-	10,649	3,691
Salaries		116,962	10,134	127,096	117,010
Social security		8,216	-	8,216	-
Pensions		2,288	-	2,288	2,037
Telephone and internet		226	1,416	1,642	2,101
Post printing and stationery		1,190	2,995	4,185	6,150
Advertising and marketing		2,927	1,834	4,761	1,345
Travelling		-	1,173	1,173	243
Hub activities expenditure		9,935	3,689	13,624	184
Wetherby hub expenditure		-	-	-	111
CIN gardening expenditure		-	33,422	33,422	6,256
Computer equipment and consumables		7,146	5,658	12,804	6,744
Cleaning		-	-	-	4
Covid expenditure		-	12,346	12,346	5,007
Subscriptions		188	-	188	213
Sundry expenses		554	37	591	669
Training		1,149	-	1,149	95
Accountancy fees		2,400	-	2,400	1,356
Bookkeeping		2,153	-	2,153	1,350
Legal & professional fees		2,811	10	2,821	665
Donations		-	-	-	518
		<u>175,716</u>	<u>72,714</u>	<u>248,430</u>	<u>162,454</u>
		17,915	54,454	72,369	25,616
Finance costs					
Bank charges		410	-	410	187
Interest on taxation		25	-	25	-
		<u>435</u>	<u>-</u>	<u>435</u>	<u>187</u>
Net Profit		17,480	54,454	71,934	25,429

The notes on pages 4 to 6 form part of these accounts.

Balance Sheet

WiSE – WETHERBY IN SUPPORT OF THE ELDERLY

BALANCE SHEET AS AT 31 MARCH 2022

	Notes	2022	2021
		£	£
FIXED ASSETS			
Tangible fixed assets		-	-
Current Assets			
Debtors and prepayments	5	1,436	-
Cash at bank and in hand		<u>358,783</u>	<u>278,374</u>
		360,219	278,374
Current Liabilities			
Creditors	6	<u>12,282</u>	<u>69,771</u>
NET CURRENT ASSETS		<u>347,937</u>	<u>208,603</u>
NET ASSETS		<u>347,937</u>	<u>208,603</u>
FUNDS			
Restricted funds		159,969	105,515
Unrestricted funds		<u>187,968</u>	<u>103,088</u>
		<u>347,937</u>	<u>208,603</u>

Approved by the trustees on
and signed on their behalf by:



Mark Storey
Chair of the Trustees

29th September 2022

Notes to the Accounts

WiSE – WETHERBY IN SUPPORT OF THE ELDERLY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2022

1. ACCOUNTING POLICIES

a. **Basis of preparation of accounts**

The accounts have been prepared under the historic cost convention and in accordance with applicable accounting standards and follow the recommendations in 'Accounting and Reporting by Charities' (SORP).

b. **Income**

Grants receivable are accounted for on receipt, unless the period to which they relate is specified by the funder, in which case they are applied to the appropriate accounting period and that part of the grant relating to a future accounting period is included in deferred income. Voluntary income and donations are accounted for as received by the charity.

c. **Resources expended**

Resources expended are recognised in the period in which they are incurred. Resources expended include attributable VAT which cannot be recovered.

d. **Unrestricted funds**

Unrestricted funds are donations and other incoming resources receivable or generated for the objects of the charity without further specified purpose and are available as general funds.

e. **Restricted funds**

Restricted funds are those funds which are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Notes to the Accounts



WiSE – WETHERBY IN SUPPORT OF THE ELDERLY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2022

2. NET OUTGOING RESOURCES FOR THE YEAR

The net outgoing resources for the year are stated after charging:

	2022	2021
	£	£
Accountancy	1,800	1,356
Independent Examiner's fee	600	-

3. STAFF COSTS AND NUMBERS

Staff costs were as follows:-	2022	2021
	£	£
Wages and salaries	127,096	117,010
Social security costs	8,216	-
Pension contributions	<u>2,288</u>	<u>2,037</u>
	<u>137,600</u>	<u>119,047</u>

The average weekly number of employees during the year, was as follows:-

	2022	2021
Charitable work – activities for the elderly	9	7
Administration	<u>-</u>	<u>-</u>
	<u>9</u>	<u>7</u>

All staff members do their own administration.

4. TRUSTEES

No remuneration or expenses were paid to trustees in the year.

Notes to the Accounts

WiSE – WETHERBY IN SUPPORT OF THE ELDERLY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2022

5. DEBTORS AND PREPAYMENTS

				2022	2021
				£	£
Prepayments				1,425	-
Other Debtors				11	-
				<u>1,436</u>	<u>-</u>

6. CREDITORS

				2022	2021
				£	£
Trade Creditors				9,808	-
Accruals				2,474	-
Deferred Income				-	69,771
				<u>12,282</u>	<u>69,771</u>

7. ANALYSIS OF NET ASSETS BY FUND

	Unrestricted Funds	Restricted Funds	Total
	£	£	£
Current assets	200,250	159,969	360,219
Current liabilities	(12,282)	-	(12,282)
	<u>187,968</u>	<u>159,969</u>	<u>347,937</u>

8. MOVEMENTS IN FUNDS

	Balance 1 April 2021	Movement in Resources Incoming	Outgoing	Balance 31 March 2022
	£	£	£	£
Children in Need Gardening Scheme	15,484	40,560	33,422	22,622
Meet up Monday	20,260	24,108	-	44,368
Covid	<u>69,771</u>	<u>62,500</u>	<u>39,292</u>	<u>92,979</u>
Restricted Funds	105,515	127,168	72,714	159,969
Unrestricted Funds	<u>103,088</u>	<u>193,631</u>	<u>17,615</u>	<u>187,968</u>
	<u>208,603</u>	<u>320,799</u>	<u>248,865</u>	<u>347,937</u>

9. INDEMNITY INSURANCE

Indemnity insurance has been purchased to protect the charity, trustees and officers from loss arising from the neglect or default of the trustees or officers.



Last Collection Time
Monday to Friday
9.00am

A 4.00pm or later collection is made
from the Postbox at
284 Beaver Hill Road

The latest collection in the area is made
at 7.30pm from
Sheffield Mail Centre,
Brightside Lane S9 2Xx

Saturday
7.00am

03457 240740
www.royalmail.com
03457 4000606
Freemove number 333 9250

Corporate information

Wetherby in Support of the Elderly (WiSE)
(A charitable incorporated organisation).

Principal address:

The One Stop Centre
Westgate
Wetherby
LS22 6NL

Telephone 01937 588994

Website www.w-ise.org.uk

Registered charity number- 1163698

Trustees

The charity trustees are appointed as and when appropriate by the body of trustees in office. The trustees who served during the period and those currently in office are:

Mark Storey (Chair)

Caren Rowe (Treasurer)

John Wardley

Norma Harrington

Michelle Atkinson

Chief Operating Officer

Mark Dobson

Independent Examiner

GL Barker & Associates,
47-49 Austhorpe Road,
Leeds,
LS15 8BA

Bankers

Barclays Bank
24/26 Market Place
Wetherby
LS22 6NF

Yorkshire Building Society
12/14 High Street
Wetherby
LS22 6LT





Thank You

The trustees would like to offer their thanks, again, to everybody who has supported the organisation either through volunteering, offering their valuable time and skills or through invaluable financial support.

We remain as committed as ever to supporting older people in Wetherby and our surrounding communities and facing the challenges of a still uncertain future.

Due to your support we can, and will, rise to these challenges. So again, thank you!

WETHERBY IN SUPPORT OF THE ELDERLY

England & Wales - Charity number 1163698

Accounts

Annual Report and Accounts 2020-21



Contents

3	Chair's Introduction
4	Trustee's Report
5	A Message From Our Chief Operating Officer
7	Strategic Report Our Strategy for 2021/22
8	Plans and Objectives for 2021/22
9	Other Matters of Significance During the Reporting Period
10-11	Achievement and Performance for 2020/2021
12-13	Our Activities
14-15	Information and Advice
16-17	Befriending
17	Grass cutting
18-21	Governance Structure and Management
23	Financial Review
24	Financial Statement
26	Independent Examiners Report
26-27	Corporate Information

Chair's Introduction:

As Chair of Trustees, I present the Annual Report and Accounts for the year ending the 31st of March 2021 on behalf of Wetherby in Support of the Elderly.

The trustees hope this document provides a comprehensive overview for stakeholders, our service users (often referred to as friends), volunteers, commissioners and other interested parties- of the work of the organisation has undertaken within an unprecedented 12 month period.

The charity has, again, delivered its charitable objectives. We have also taken on extra demands as the operational hub for the Outer North East area of Leeds, providing support for vulnerable people during COVID-19.

During the course of the reporting period we had one trustee who stepped down and we thank Nicky Pagett for her hard work for the organisation.

In April 2020 - the beginning of the reporting period, the majority of our core services had already been suspended through the outbreak of COVID-19 and the implications around the first lockdown during spring and summer that year.

This coincided with our commissioners at Leeds City Council, and others, developing hubs which would offer support for specific areas of Leeds. WiSE immediately stepped forward to fill that gap for the Wetherby and Harewood areas, and working with key partners such as Voluntary Action Leeds, coordinated the relief effort for vulnerable people. This meant the charity provided vital services including emergency food parcels, shopping, prescriptions and delivery of medicines, along with weekly well-being calls.

The trustees would like to take this opportunity to thank the many volunteers who stepped forward in this period to help with this enormous task and, in addition, we would like to thank our Chief Operating Officer Mark, his team and our existing volunteers who, in the early days of the pandemic, were working seven days a week to provide these essential services. It has been an enormous, challenging, but worthwhile undertaking.

As mentioned in my comments on the report for 2019-2020, loneliness and social isolation can be devastating for older people, and impacts their health and well-being. The vital work that the organisation undertook this year, reaching out to hundreds of lonely and vulnerable people through weekly well-being calls was an essential lifeline for many. It was also a way for us to pick up more complex cases and work with individuals to provide support in what has been one of the most difficult periods for all of us.

It is pleasing as I write these comments that we are now in the process of, hopefully, emerging from the pandemic and re-starting our core services, such as our popular social activities, transport scheme, our grass cutting offer and a whole range of new services. We have been able to plan these during this period, where we were unable to have those fantastic interactions with the public that has been the bedrock of the organisation for the last 18 years.

I have been proud to chair the charity through this period and the trustees believe that more than ever, when we were needed, the staff and volunteers really stepped up to deliver for our extended community. Despite this being one of the most difficult periods in all our lives I will look back on it with great pride as to what we have achieved as an organisation.

Without your continued support this would not have been possible so, to conclude, I will simply say thank you and here's to a brighter future.

Mark Storey
Chair of Trustees.



Trustee's Report:

The trustees present their Annual Report together with the Financial Statement of the charity for the year 1st April 2020 to the 31st of March 2021.

The trustees confirm these documents comply with the current statutory requirements, the statutory requirements of the charity's governing document and the provisions of the Statement of Recommended Practice (SORP), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) as amended for accounting periods commencing from the 1st of January 2016.

A message from our Chief Operating Officer:

In a completely unprecedented year for everybody, WISE has had to quickly step forward to deliver a whole range of new services to support not just the over 60s, but also people shielding and vulnerable due to the onset of the pandemic from March 2020.

This meant quickly stepping up and becoming the operational hub for Wetherby and the surrounding villages. It involved offering that essential support to people including basic services such as shopping, food parcels, prescription deliveries and a much-needed lifeline through the telephone befriending system we quickly established at the beginning of the pandemic.

Sadly, many of our popular core services had to be quickly suspended. I am proud to say though that each member of the team, our trustees and our amazing volunteers quickly adapted to the new reality to offer that much-needed support to the vulnerable.

We have been fortunate that our in-demand advice and information service has been able to continue throughout the reporting period.

It was also a year when the organisation expanded and developed our key partnerships by working closely with the local authority, our local councillors, Voluntary Action Leeds, church and community groups across the area and a new cohort of volunteers who stepped forward during the first lockdown to help deliver essential services on the ground.

In the face of an uncertain future, this is work we intend to continue where and when needed but, equally, we now think it is time to begin to re-emerge from the clouds of the last year and begin to deliver many of our core services in a safe, Covid-19 compliant way. This will be our mission into the next reporting period and beyond.

For me the most important element of this last, difficult, period has been the immense amount of goodwill and community support we have received in our attempt to deliver a vital range of services under the most trying of circumstances.

We could not have done this without the massive support of the community. More than ever, we feel incredibly positive about moving forward into better times to deliver not just our existing services but also new and exciting options for the new friends we have made over the last 12 months of reporting period.

Thank you and sincere best wishes from myself and my team.

Mark Dobson
Chief Operating Officer
WiSE

Strategic Report

Our Strategy for 2021/22

Due to the coronavirus pandemic, our strategy for 2021/2022 is in keeping with last years- given we changed our key services to adapt to local requirements.

We will continue to focus on the provision of much needed services for older people who live in Wetherby and its satellite villages. We aim to do this to ensure older people are supported to retain their independence and continue to live active lives within their community.

Through the implementation of our strategic framework, we are challenging ourselves to improve our services to be first-class and in high demand, so that the health and wellbeing of those we support is truly enhanced.

Our strategic framework is made up of five core aims:

Continual development of our performance to deliver our operational aims

We are outcome-focused and constantly keep our services under review to ensure they reflect best practice, changing demand and to ensure our services match the needs of our clients, commissioners and broader health and wellbeing agenda.

Our services are outcome focused and have clear objectives. We set and measure these using evidence.

Reflective practices and monitoring practices are in place including performance appraisals and review.

Our database is kept under review to ensure data capturing is up-to-date, robust and accurate.

Statutory and regulatory requirements are understood, implemented and complied with.

To provide safe and secure services for our client base

Policies and procedures are in place for safeguarding, with a strong focus on adult and child risk, and these are reviewed regularly.

Policies and procedures are in place to ensure we operate within a safe work space and we employ safe working practices and these are reviewed regularly.

Information and data is stored securely in line with regulatory requirements.

An appropriate risk management framework is in place.

To be well led

We are up-to-date with our policies and procedures and ensure these are adhered to. We have effective management systems including a robust trustee body and a management structure that feeds in to the trustees.

Managers proactively support a positive culture which is person-centred for both staff, volunteers and the people we support. It is open, inclusive and empowering.

Governance structures are clear and transparent, clearly documented and are regularly implemented and reviewed through meetings.

Current legislation and regulations are complied with.

To be effective in our strategic and operational aims and objectives

We ensure our services are reviewed to reflect our clients needs.

We have the correct amount of staff and staff knowledge to undertake strategic and operational requirements.

Changes in need and local priorities are identified and responded to.

We work effectively with other agencies and our commissioners. We are inclusive and accessible to all within our client base.

To engage with our friends to ensure they are involved with our services to help steer the organisation

We engage with our clients in a variety of ways and ensure involvement has taken place.

Our client base is given opportunities to be involved with the delivery and changing nature of our services. We listen and act upon client feedback.

Through our policies and procedures, our client base and others know how to complain or pass compliments to the service to help steer client involvement and service delivery.

Plans and Objectives 2021-2022

In line with the delivery of our strategy, the key objectives for 2021/22 are:

1. We will be a well led organisation

Develop a Customer Service Charter focussing on how we promise to work with our friends and others.

Continuing our assessment of our charity against the Charity Governance Code for Small Charities, ensuring the high standards of governance which form part of the principles and recommended practice are met. How we contribute to the Code will be explained.

Ensure our Human Resources policies are fully reviewed to ensure full compliance with legislation and that best practice is adhered to.

We will work towards diversity of the board of trustees and will recruit a minimum of two new trustees with relevant skills and qualities.

2. Services offered by Wetherby in Support of the Elderly will be reviewed

We will involve our friends in a more focused way to make sure our services are relevant to their needs.

Outcome measures will be investigated and an appropriate methodology will be adopted which contributes to service development and delivery.

We will conduct a survey of friends, their families and other stakeholders in order to inform a future study of social impact.

3. We will build our reputation and raise our profile

We will develop our workforce, providing appropriate training opportunities which contribute to improving staff skills and knowledge.

We will provide more opportunities for volunteers, both in terms of varied roles, and meaningful skill development and access to learning.

We will seek external recognition for the organisation through independent external evaluation and assessment. We will ensure that all opportunities for the publicity and promotion of our services are maximised.

4. We will strengthen the organisation by diversifying income

We will review our fundraising strategy and case for support and a new plan will be implemented which reflects our ambitions.

Other matters of significance

Throughout the 2020/21 reporting period, the Covid-19 pandemic has clearly dominated our work programme and the way we have operated.

With the exception of the information and advice service and our befriending scheme (which was run remotely) many of our core services have been suspended through an inability to provide them in a safe Covid-secure way.

We have remained mindful, at all times, that public health has to be paramount which lead to the suspension of our core services.

However, it was also clear that there was a need to provide a service for residents on a broader footprint of both the Wetherby and Harewood wards and to expand our friends to include people under 60 who were shielding or clinically vulnerable due to the impact of the pandemic.

Through our Covid related activity, our partnership work has increased significantly over the reporting period working with key partners such as Leeds City Council, Voluntary Action Leeds, local NHS providers and a whole range of third sector charitable groups and churches.

From the beginning of the reporting period to the present time we have been operating as the lead hub in terms of providing vital support such as prescriptions, medicines, food parcels, shopping and wellbeing calls for any clinically vulnerable person within the area we cover.

During the reporting period, 1st April 20 – 31st March 21 we acted as a Covid hub, and:

- Received 481 LCC/VAL referrals for Wetherby and Harewood, which resulted in -
 - ✓ Delivery of 77 emergency shopping parcels for the vulnerable
 - ✓ Collection and delivery of 279 prescriptions
 - ✓ Purchase and delivery of 625 food parcels for those shielding or self-isolating

We also:

- Made 4706 Covid-19 wellbeing calls, and 5280 since the pandemic started
- Sent out 1412 Activity Packs
- Distributed 954 food parcels from the WISE office (non-referrals)
- Distributed 500 crafts sets
- Acted as Covid-19 marshals in Wetherby, supported the vaccine rollout and continued to fund support for our NHS colleagues and volunteers to enable them to undertake this work
- Made 11 Christmas Day visits to people celebrating alone
- Gave 23 Christmas meal vouchers
- Provided numerous online activities



Looking ahead:

Our transport provision and our community café remain suspended, but we hope these services will be resurrected within the next reporting period and possibly as early as July 2021 depending on the government roadmap for exiting the pandemic.

Similarly, we are hopeful we can resurrect our activities and events during the next reporting period, again dependent on government guidance.

We are currently working with Voluntary Action Leeds on the prospect of becoming the community anchor from Outer North East Leeds post-June 2021. This would be around offering a broader range of support for vulnerable people - not just relating to the pandemic, but also increasing and enhancing our core services.

Achievements and Performance

2020-2021

What did we say?	What did we do?
We would continue to monitor and evaluate our services and activities and respond to need.	Our monitoring remains compliant with the needs of our commissioners but, in this reporting year, we have drastically altered the range of activities we have undertaken to reflect the needs of the community throughout the pandemic. This has involved ensuring vulnerable people have access to food, shopping, prescriptions as well as our wellbeing calls.
What did we say?	What did we do?
We will continue to increase our fundraising and community activities secure the future of our provision.	During the reporting period we have ensured the work we have undertaken as the operational hub throughout the pandemic, supporting the Wetherby and Harewood wards, has been fully funded through our active progression of grant funding opportunities. This means we have been in a fiscally sound position to carry out our work supporting vulnerable people. Our legacy giving continues to grow and we have also now included a range of options for donations on our new website.
What did we say?	What did we do?
We would continue to improve our profile within the community.	During the last year we have significantly increased our profile both in print and broadcast media, with 64 pieces of press coverage in print, online and broadcast media since November 2020. In January, we developed and launched our new website, www.w-ise.org.uk . Our social media presence continues to increase, with our Facebook page alone reaching 20,897 people, groups and pages up 428.5% from the previous year.
What did we say?	What did we do?
We would increase our volunteer base and wider opportunities for volunteers.	During the reporting period, despite our core services being suspended, we engaged with many new volunteers who stepped forward to help with the pandemic via Voluntary Action Leeds and these volunteers were deployed in such vital areas of support as shopping, going for prescriptions, delivering food parcels and carrying out wellbeing calls.
What did we say?	What did we do?
Ensure the charity meet the high standards listed in The Charity Governance Code.	We continue to employ high standards, regularly checking our policies to ensure they are fit for purpose. We also work tirelessly to ensure our staff, volunteers and trustees carry out our ethos in word and deed. We continue to complete the self-assessment against The Charity Governance Code which we review annually.

We said?	Year like no other highlights breadth of our work
We would continue to monitor and evaluate our services and activities and respond to need.	During the first year of the pandemic, WiSE made nearly 5,000 wellbeing calls to people shielding alone, delivered 15 editions of activity packs to keep more than 100 older people entertained and organised dozens of online sessions from line dancing to singing to keep spirits high. An unprecedented year also saw our army of volunteers and tiny team of paid staff deliver food and medicine to vulnerable people of all ages, after being made a Voluntary Action Leeds and Leeds City Council referral hub. All this on top of our usual day-to-day work supporting older people throughout Wetherby and its surrounding villages, which includes befriending visits and information and advice sessions- all of which had to be delivered remotely.
We said?	Co-op shoppers bag us community fund windfall
We will continue to increase our fundraising and community activities to secure the future of our provision.	WiSE benefited from a £375 cash windfall thanks to Co-operative members, who selected us for support after hearing about our memory café for those living with dementia and their carers. The café, although it was suspended during the pandemic, offers wellbeing support to up to 20 service users in Wetherby and nearby villages. Wetherby Co-op members chose WiSE to receive support through the Co-op Local Community Fund. Every time members buy selected Co-op branded products and services, two pence from every pound spent goes to support community organisations and local causes.
We said?	Longest serving volunteer backs call for others to support our work
We would increase our volunteer base and wider opportunities for volunteers.	One of our longest serving volunteers has backed calls for more people to come forward to support our work. Jacqueline has volunteered for six years and says the best bit about her role is knowing the difference she makes to an older person's life. Jaqueline said: "I started to volunteer at one of the regular memory café meets. I was very nervous, but the other volunteers and the then events coordinator Karen made me feel very welcome. "WiSE is a great charity which supports the older community. You only have to listen to the people around Wetherby to know it is doing a good job. For people who are thinking of volunteering- just do it. It's so rewarding to think that you have helped someone to feel better about themselves."
We said?	Lord Mayor's honour for WiSE's coronavirus community support
We would ensure the charity meets the high standards listed in The Charity Governance Code.	We were privileged to be hand-picked for a special mayoral award, after switching our services to support residents hit by the pandemic. We quickly stepped up to deliver food parcels, shopping and prescriptions to people of all ages, having had to suspend many of our much-loved older persons services when lockdown first hit. Local councillors nominated us to be honoured for special recognition by the Lord Mayor of Leeds, as a way of thanking our army of volunteers for their kind-hearted work. We were awarded the certificate at an online meeting hosted by the Lord Mayor, Councillor Eileen Taylor.

Our Activities - An overview

We carry out a wide range of services and activities in line with our charitable objectives.

Our activities and services are promoted in a variety of ways. We actively engage with local parish councils and community groups and more than 700 newsletters are sent out each month, via e-mail, post or hand.

We have employed a part time communications officer who provides publicity material to the media in Wetherby and Leeds and we continue to advertise in parish magazines. GP Surgeries, local Churches, Town Hall, and the One Stop Centre all display information on our services and activities together with our newsletter. We also promote our events and activities on our new website and social media platforms.

Transport scheme

A volunteer driver will collect a friend and drive them to an appointment, activity, or to meet up with friends. A friend pre-books this service via a dedicated transport telephone line, which is run by our Transport Co-ordinator. The scheme has been running for six and a half years and is greatly valued by our friends. We currently have a trusted team of volunteer drivers, although the transport scheme was suspended during the reporting period due to Covid-19.

Soup and a Smile

Once a week our volunteers deliver hot soup, a roll and a piece of cake to a member of the community who finds it difficult to get out. The volunteer stays with the friend and keeps them company while they eat their lunch.

WiSE Owl Café

The café is based in Boston Spa Village Hall and is currently in its eighth year. It is still a popular event, acting as a regular meet up for many of our customers, be it for coffee and a chat, or lunch. The café has two part-time members of staff supported by a dedicated band of volunteer servers and bakers. It sources its food from local suppliers and volunteer bakers make the delicious cakes and scones.

The Elderberries

The Elderberries is a monthly social gathering which takes place at Wetherby Social Club. All Friends and carers are welcome to attend The Elderberries where they are entertained by professional musicians or by local entertainers.

Chatter and Batter

Once a month friends are invited to gather together for a fish and chip lunch. This is a very well attended group. Friends who attend enjoy the company and the quizzes that 'Chatter and Batter' provides.

Knit One Purl WiSE

This is a weekly knitting group which meets at our Boston Spa Village Hall. The group works on projects and produces items which WiSE can sell to raise funds and for the group's equipment and outings.

Poetry

Twice a month a poetry group meets at Boston Spa Village Hall. Friends recite their own poetry or the works of other poets.

Christmas and Summer Madness

We organise a large get together for our friends twice a year. The venue holds 100 people and we are always oversubscribed. It is an opportunity for all the groups to get together for an afternoon tea. A professional entertainer is booked and supported by our local volunteer entertainers.

Singing Group – 'Rockin' Robins'

This singing group takes place at Boston Spa Village Hall. They provide the opportunity for friends to gather together and sing along using song sheets.

Chairobics

Chairobics is offered on a weekly basis. It is a popular activity with between 40 and 50 people attending regularly - enabling people to interact in the community and thereby reducing social isolation.

Line Dancing

Line dancing promotes balance, coordination and is an excellent cognitive exercise which is relevant for our target age. Julie who runs the sessions is very popular with our clients, and has provided us with weekly online dances to keep our regulars in practise.

Dementia Friendly Community

One of our aims of providing a Dementia Friendly Community continues. All of our activities are dementia friendly. We have a member of staff who is a 'Dementia Friend'.

Meet Up Monday

This is a wellbeing café for those living with dementia and their carers. It enables people to meet up, have something to eat and drink, take part in activities or simply chat. It has been an invaluable support to all. We work closely with Over the Rainbow to deliver this scheme.

Volunteers

We actively recruit volunteers over the age of 16 to assist in the delivery of our services. Volunteering is a worthwhile and enjoyable activity and there are a wide range of opportunities with us. Our Volunteer Co-ordinator is based at our Wetherby offices and welcomes enquiries from people who want to support those in the local community. All volunteers undertake an induction and receive training appropriate to their role.

Volunteers are vital to our success. Without them we could not continue to develop our services and programme of events. Their help in delivering our services, through roles such as activity helpers, befrienders, dementia supporters, drivers, fundraising, Soup and a Smile and trusteeship means we can continue our much needed work.

At the end of the reporting period, we had 148 volunteers across our programmes. The volunteers range from young people to 'very senior'. In 2021/22 we aim to improve our support through training, recognition and communication. We are also continuing to develop additional volunteering opportunities.

Partnerships

The trustees are particularly grateful to our community partners for all their support. All have helped us to meet our objectives and benefit older people and their carers in our area.

We are especially grateful for the support of Boston Spa Village Hall. The venue is home to our much-loved Wise Owl Café. The hall actively supports WiSE and provides a venue for many of our activities.

Other local partnerships include:

- St Joseph's Church
- The Methodist Church in Wetherby
- Thorner Over 55s Club
- Churches Together
- Wetherby District Lions Club
- Wetherby Runners
- LCC Outer North East Community Committee for clarity
- Voluntary Action Leeds and Doing Good Leeds
- Local primary care team/NHS, Outer North East community committee
- Wetherby Co-operative

We welcome local groups, whether small and informal or larger in size, to contact us through our Activities Coordinator.

Other activities

On the following pages we will highlight some of the other main schemes we deliver.



Information and Advice

This service provides information and advice to over 60s on a range of issues, including how to apply for allowances and benefits, support for people with form filling, guidance on finding trusted tradespeople or carers and directing clients to appropriate support services and organisations.

We have an experienced and knowledgeable Information and Advice Coordinator based at our Wetherby offices, but who also provides a roaming service at local venues.

From April 2020 at March 2021 there were 490 Information and Advice contacts with clients.

More than half of these contacts resulted in signposting/ referral to appropriate organisations and sources of support, including Department of Work and Pensions, Leeds City Council and Leeds Directory.

Almost 50 clients received intensive one-to-one support, which included completion of 36 forms, from Council Tax discount claims to care ring pendant alarm applications.

The Information and Advice service also completed 16 blue parking badge applications and filled in 14 attendance allowance forms using telephone appointment only service.

During the reporting period, there were 36 new referrals to WiSE, which came from NHS health practitioners, One Stop Centre and Connect Well, amongst others. Information and Advice contacts during the pandemic were completed over the phone, rather than face-to-face.

Information and Advice – a case study

CASE STUDY

Information and Advice Service – Mr. A

Mr. A used WiSE services for the first time in 2018 when he needed help to apply for a blue parking badge. Mr. A, aged 86, was aware his badge was due to expire. Mr. A contacted WiSE to take up the offer of help to apply online by telephone from home.

What we found:

- Mr. A suffers with angina and relies on his blue parking badge
- Mr. A's blue parking badge was about to expire
- Mr. A didn't have access to a computer

What we did:

- We made an appointment date and time to fill out the application with him
- Mr. A was able to renew his blue parking badge with our help.

Mr. A said:

“

I do not have a computer so this would have been a difficult process. I spoke to Nicola in the office who did it all on the system. I felt really pleased with the service and with Nicola's friendly nature. Thank you for your help.

”



Befriending

Our befriending service matches an isolated older or vulnerable person living alone with a volunteer who gives up their time to regularly provide friendly conversation and companionship.

Where possible, matches are made based on shared interests and both parties living in the same area. Once a befriending match has been made, each person is introduced in the company of one of our co-ordinators.

We have a team of 30 befriending volunteers who come from all walks of life and are asked to commit to a minimum of one hour a week, which involves dropping in for a cup of tea and a chat.

Since the pandemic, face to face visits have been replaced by weekly telephone calls. In the last year alone, our volunteers made more than 275 befriending calls to our older friends.

For an older person, regular social interaction helps to break their feeling of isolation and helps to make them feel a part of the community.

For the volunteer, the visits are often satisfying, enjoyable and an opportunity to meet someone new to hear about their stories and experiences.

Befriending: ‘Sheila’ – a case study

CASE STUDY

‘Sheila’ says weekly phone calls gave her the strength to keep going during the pandemic, despite being isolated and housebound. She began speaking to telephone befriender Christine when lockdown first hit last spring.

She said: “I started speaking to Christine soon after the first lockdown in March last year. I now speak to her every week and it’s something I’ve come to rely upon. It’s doing me a lot of good simply to talk to someone. It’s kept me strong and kept me going.”

What we found:

- Sheila was left isolated and housebound during lockdown.
- Worries about the pandemic were causing her additional anxiety and stress.

How we helped:

- We matched Sheila with telephone befriender Christine.
- Regular chats helped to reduce Sheila’s feelings of isolation and stress.

“

It was Friday and I was the first person she’d seen all week – there was a sparkle in her eyes when I left as she loves to talk and my visits make a world of difference.

”

Grass Cutting

WiSE has a long standing partnership with Children In Need (CIN) and Wetherby Young Offenders Institute (WYOI) to provide a grass cutting service for older people who find it difficult to maintain their lawns.

Once we identify older people in need of help, WYOI provide a trained horticulturist to supervise young offenders who have expressed an interest in developing horticultural skills.

The gardeners have all been risk assessed for suitability to earn Release or Temporary Licence before they take part in the project. The aim is for them to use this work experience to go towards a relevant qualification, giving

them a great chance for future employment.

The scheme helps to improve relationships between young and older people and is greatly valued by those who use this service.

The scheme is the only one of its kind in the country. It was granted a ‘Connecting Communities Award’ for the impact it has made so far.

During the reporting period, the grass cutting service was postponed due to the pandemic, but restarted from June 2021.



Governance Structure and Management

Our constitution

The Charity is a Charitable Incorporated Organisation (CIO). It is governed according to a Charity Commission Foundation Model Constitution dated 22nd September 2015 and is therefore detailed and fit for purpose and protects the continuation of the Charity.

Our objective

The objectives of the CIO are all for the public benefit.

Chiefly, our aim is to support older people, and those who care for them, who live in the Wetherby area (Wetherby, Linton, Boston Spa, Thorp Arch, Walton, Clifford, Bramham, East Keswick, Harewood, Collingham, Bardsey, Scarcroft and Thorner) and who are socially isolated, or living with chronic or degenerative conditions, so that they can retain their independence and continue to live active lives within their community.

Public benefit

In planning our activities, the trustees consider the specific objectives of the charity, along with our vision, mission and values. We review our aims, objectives and activities annually. As part of that process, we consider the outputs of our activities, assess the benefit of those outputs on the lives of older people and develop future activities to make sure our work continues to deliver the most benefit against our charitable objectives.

This report contains more information on the way our work has benefited older people over the last 12 months, measured against objectives set at the beginning of the year.

The trustees confirm they have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Activities

This is our 18th year supporting Wetherby's older people. During that time we have seen our organisation grow, both in terms of services we provide and the requests for help we receive. It is a well-known fact that older people are living longer and need more support to enable them to live a comfortable and independent lifestyle and through our range of activities and services we aim to ensure this can happen.

We want to place WiSE at the heart of its community. To do this effectively we continually monitor and evaluate the services and activities we provide to ensure they meet the needs of our friends and their carers. Our current provision includes:

- Befriending
- Information and Advice
- Transport Scheme
- Soup and a Smile
- The WiSE Owl Café
- The Elderberries
- Chatter and Batter
- Knit one Purl WiSE
- WiSE Poetry group
- Rockin' Robins
- The Nightingales
- Chairobics
- Line Dancing
- Grass cutting
- Laptop Loungers

The schemes are co-ordinated by a team of staff and a large amount of the work is carried out by volunteers- currently numbering around 148. These volunteers work in many different roles in the community, back office or directly with friends, not only making many of our schemes possible by giving their time freely, but also bringing a true community perspective.

All our work is based on supporting the wellbeing of older people in Wetherby and surrounding areas. This means we help people to stay safe, well and live independently in their community for as long as possible. During the 12 months covered by this report the schemes have helped 1,686 older people and their families and received 971 referrals.

Whilst these numbers illustrate our activity levels, they do not indicate the significant positive ripple that comes from many actions, bringing additional benefits to our friends, their family, wider networks and community and this is something we are looking to measure in the future. The social benefit that WiSE brings is without question, but as yet we cannot attribute a value to that benefit and this is something we wish to be able to do.

We are committed to collaborative working and this continued in 2020/21 with renewed partnerships with voluntary, statutory and private sector organisations, all of which were focused on promoting and supporting the welfare of older people living locally. Adopting a joint approach means we can keep our friends and their families as the focus of our attention when designing and delivering new services.

Governance and management

The overall management and control of the Charity rests with the individual members of the board of trustees

who give their time freely and receive no remuneration or other financial benefits. The Charity's trustees meet in accordance with the Constitution which requires the presence of at least two or, if greater, a third of its members to form a quorum. The Board may appoint a Chairperson and revoke such appointment at any time. All business is decided by a simple majority, each Trustee having one vote. In the event of an equality of votes, the Chairperson of the meeting has a second or casting vote. The trustees are responsible for decisions taken in relation to the strategic running of the charity but the day to day running of the Charity is delegated to staff.

Trustee committees

The trustees delegate responsibility for more detailed consideration of the charity's affairs to four sub groups, each including at least two places for trustee members, chaired by a trustee and reporting to the board of trustees. These subgroups are:

- Finance
- HR & Policies
- Strategy and Service Development
- Fundraising and Marketing

Recruitment and appointment of new trustees

The existing trustees are responsible for the recruitment of new trustees. The trustees undertake a skills audit which identifies specific skills needed to enhance the existing board. In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO. In addition, individuals who apply to become trustees must demonstrate a personal or professional interest in the care and well-being of older people.

Every appointed trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of trustees. Trustees retiring at the end of their term are eligible for reappointment. A trustee who was served for three consecutive terms of three years may not be reappointed for a fourth consecutive term, but may be reappointed after an interval of at least one year.

There shall be a minimum of four trustees and a maximum of 10. At the end of the reporting period there were four trustees.

Following appointment, new trustees are introduced to their new roles and given a Trustee's Handbook which covers all aspects of the role. This includes a copy of the Charity Commission's guide 'The Essential Trustee' and copies of the Charity's Governing Document, financial statements and a guide to the policies and procedures

adopted by the charity. An induction checklist is included to ensure everything is covered and signed off. All Trustees are Disclosure & Barring Service (DBS) checked and references obtained.

Voluntary support

Whilst voluntary help is not valued for the purposes of the financial statements, we benefit immensely from the services provided by volunteers.

During the reporting period, we had around 140 volunteers completing several thousand volunteer hours between them. This volunteer contribution supports all of our schemes as well as back office functions and fundraising.

The trustees thank all our volunteers for their continued support. Without their time and skills, our impact would not be as significant as it is.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Strategic risk management is regularly overseen by the board of trustees. There is an overarching risk management policy which involves a regular review of key risks faced by the charity, and setting up systems and procedures to address those potential risks and to minimise any impact to the charity if the risks materialise. An annual review of the risk register also takes place.

The trustees also have in place policies addressing the main operational risk areas. The trustees consider the following to be the key risks facing the organisation;

- Similar to many charities, the main risks facing WiSE are financial, relating to the loss of contracts, a reduction in grant income or a reduction in public donations, thus impacting on income targets. Because of the reliance identified above we need to take account of changing economic, policy and social conditions which may affect individual supporters, corporate donors and statutory and trust funders. These risks are managed proactively through the assessment of new opportunities and existing contracts, planned appeals and continuous review of organisational costs. An appropriate level of funds will be maintained to help mitigate the main financial risks. Additionally, trustees monitor results quarterly and consider the long term impact of emerging trends. They also oversee compliance with fundraising regulation and ensure fundraising is carried out to high ethical standards. We are continuing to invest in income diversification projects to mitigate the risk where possible.



- We recognise the importance of safeguarding vulnerable people in all areas of our work. The charity has a safeguarding policy which applies to all staff and volunteers who have regular contact with older people. This policy is supported by safer recruitment practice and training programmes for staff and volunteers. Although we believe the operational procedures have strong safeguards embedded in them, it remains a key risk on our risk register.
- We recognise the risks associated with information security and the importance of protecting our IT systems from malicious attack and unauthorised access and misuse. Security measures are in place to protect from unauthorised access to IT systems and to test vulnerabilities in the network. We hold a limited amount of personal information about our service users. We have a Data Protection policy in place which ensures only authorised access to personal details and continues to enhance the security of the data in line with best practice.
- We deliver services where they are needed. In all situations the health and safety of our staff, service users and others working with us is a prime concern. A significant proportion of staff and volunteers are lone workers, making visits to a range of locations. The charity has appropriate policies, guidance and training, and any health and safety concerns are reported to the trustees at regular board meetings.

Fundraising

The majority of our voluntary income last year was raised through charitable trusts and foundations which supported our projects and services. A small amount of income came from service users and individuals supporting our work. All our activities deliver on our fundraising promise.

We proactively comply with all fundraising related legislation and marketing regulation. All of our fundraising activity has been led by staff and volunteers.

As part of our approach, policies and standards, we ensure that we protect vulnerable people and other members of the public from inappropriate behaviour - we proactively train everyone involved in fundraising, with clear processes in place to monitor and manage every interaction. In the past year, we have not uncovered any failure by staff or volunteers to comply with these schemes and standards and we received no fundraising complaints in 2020/21.

Financial Review



FINANCIAL REVIEW MARCH 2020 TO 30 APRIL 2021

2020-2021 Financial Year have been an unusual year with COVID restrictions and isolating. But we are proud to report that WiSE, has performed beyond all expectations. This can be seen in our Financial Statements.

The Charity has three accounts:

CURRENT ACCOUNT:

For operational income and expenditure.

ALLOCATED FUNDS ACCOUNT:

The Charity received monies for specific projects or areas of service and the trustees are mindful that there must be a clear audit trail to account for these funds. Records of the funds are maintained monthly.

RESERVE ACCOUNT -

RESERVE POLICY

The Trustees of WiSE recognise that they have a responsibility to ensure that:

- Monies received are used to further the aims and work of the Charity;
- The solvency of the Charity, and
- The Charity has reserves to enable it to fulfil its legal and statutory if it is wound up.

The Reserves are maintained in a savings account with the Yorkshire Building Society. This amount is reviewed on an annual basis.

PRINCIPLE FUNDING:

The Charity's principle sources of funding are from Leeds City Council Adult Social Care. This year WiSE have received funds from LCC to assist the charity with maintaining assistance and care to our community during the COVID pandemic. The funds were allocated to COVID related expenses in our surrounding areas. Records are kept on an ongoing monthly basis, and are presented to our Accountants for verification purposes.

FUNDRAISING:

Very little fundraising was done the past financial year, with all activities on hold.

We trust 2021-2022 will be a healthy year filled with new activities.

Financial Statement and Reports



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A	Independent Examiner's Report		
Report to the trustees/ members of	Wetherby in Support of the Elderly		
On accounts for the year ended	31 March 2021	Charity no (if any)	1163698
Set out on pages	Attached		
Responsibilities and basis of report	I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/21. As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act"). I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.		
Independent examiner's statement	I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect: • the accounting records were not kept in accordance with section 130 of the Charities Act; or • the accounts did not accord with the accounting records; or • the accounts did 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.		
Signed:		Date:	7/10/21
Name:	Graeme Greenfield		
Relevant professional qualification(s) or body (if any):	ACA FCCA		
Address:	G L Barker & Co LLP 47-49 Austhorpe Road Cross Gates		

IER

1

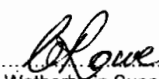
Oct 2018

Financial Statement and Reports



WETHERBY IN SUPPORT OF THE ELDERLY Income & Expense Account as at 31 March 2021

	March 2021	March 2020
Income		
Boston Hub	5.00	31,939.18
CIN – Gardening Scheme Grants	10,073.50	39,057.90
Core Funding	147,715.64	148,167.49
Covid Grants Expended in Year	24,862.61	-
Donations and Grants	5,059.42	3,466.74
Interest Income	191.66	520.27
Meet Up Monday	50.00	10,890.65
Tips	-	136.59
Training Funding	-	2,000.00
Wetherby Hub	110.50	7,848.54
Accounts Receivable	-	(12.00)
Total Income	188,068.33	244,015.36
Less Operating Expenses		
Advertising & Marketing	1,345.00	1,666.00
Accountancy Fees	1,356.00	3,303.75
Bank Fees	187.33	687.01
Bookkeeping Fees	1,350.00	-
Boston Hub Exp	182.22	1,987.72
Café Exp	3,690.78	22,938.20
CIN Gardening Exp	6,256.18	37,166.37
Cleaning	4.20	15.45
Covid Expenditure	5,007.06	-
Donations	518.00	-
General Expenses	669.00	474.88
Insurance	1,105.07	1,167.76
IT Software and Consumables	6,744.29	6,956.30
Legal and Professional Fees	665.00	-
MOM Exp	-	13,997.46
Pensions Costs	2,036.90	1,795.76
Postage, Freight & Courier	4,733.90	2,155.27
Printing & Stationery	1,415.65	3,998.27
Rent	5,600.04	5,600.04
Salaries, inc Employer NI	117,009.73	117,562.50
Staff Training	95.00	4,152.60
Subscriptions	213.00	142.00
Telephone & Internet	2,101.36	2,056.75
Travel – National	242.52	2,413.51
Wetherby Hub Exp	110.55	8,464.14
PAYE Payable	-	(5,054.14)
Rounding	-	(0.01)
Total Operating Expenses	162,638.78	233,647.59
Assets Acquired in Year		
Computer Equipment	-	(43.98)
Office Equipment	-	(448.11)
Plant & Machinery	-	(1,757.60)
	-	(2,249.69)
Operating Surplus (Deficit)	25,429.55	10,367.77
Opening Balance 01/04/2020	183,173.53	175,055.45
	208,603.08	183,173.53
Cash Funds		
Allocated Funds Account	108,149.65	108,014.37
Current Account	140,223.36	47,412.53
Petty Cash	394.91	180.04
Cash on Hand	(172.81)	(172.81)
YBS Reserve Account	2,9779.36	27,739.40
	278,374.47	183,173.53
Less Deferred Income	69,771.39	-
Total	208,603.08	183,173.53

SIGNED: 
Treasurer - Wetherby in Support of the Elderly
Dated: 07/10/2021.

Corporate information

Wetherby in Support of the Elderly (WiSE)
(A charitable incorporated organisation).

Principal address:

The One Stop Centre
Westgate
Wetherby
LS22 6NL

Telephone 01937 588994

Website www.w-ise.org.uk

Registered charity number- 1163698

Trustees

The charity trustees are appointed as and when appropriate by the body of trustees in office. The trustees who served during the period and those currently in office are:

Mark Storey (Chair)

Caren Rowe (Treasurer)

John Wardley

Norma Harrington

Nicky Pagett (Resigned in 2021)

Chief Operating Officer
Mark Dobson

Independent Examiner

GL Barker & Associates,
47-49 Austhorpe Road,
Leeds,
LS15 8BA

Bankers

Barclays Bank
24/26 Market Place
Wetherby
LS22 6NF

Yorkshire Building Society
12/14 High Street
Wetherby
LS22 6LT

Thank You

The trustees would like to offer their thanks, again, to everybody who has supported the organisation either through volunteering, offering their valuable time and skills or through invaluable financial support.

In this most trying of years the support and goodwill shown to the organisation has been exceptional with many people stepping forward to help and assist in a way that has meant we have been able to support a huge number of extremely vulnerable people.

We remain as committed as ever to supporting older people in Wetherby and our surrounding communities and facing the challenges of a still uncertain future.

Due to your support we can, and will, rise to these challenges. So again, thank you!



