

Annual Report 2023



www.widowedandyoung.org.uk
Support. Understanding. Friendship

Registered Charity No: 1164988

Introduction



A word from WAY's Chief Executive and Chair of Trustees



In 2023, we faced ongoing challenges posed by the cost-of-living crisis. Our 2023 **Impact Survey** highlighted that 68%* of WAY Widowed and Young members were concerned about their finances (up from 62% in 2022).

Over the course of the year, we met the continuing demand for our services and were able to support members who were struggling to meet the cost of the membership fee by doubling the amount available in WAY's **Memorial Fund** (see p4).

Sadly, nearly 24,000** people aged 18-51 die every year, which means that the need for WAY's peer-to-peer support services has never been greater. 2023 saw the year end with 4,650 members and we were able to welcome 1,638 new members. We saw an increase in member retention rates, with 70% choosing to renew their membership this year.

We are pleased that the time we have taken to listen to our members and respond to their needs is really helping to create a service that members truly value. Member feedback drives everything we do and we were delighted to be able to launch our new online **Members Hub** in October. This was in response to members reporting that the previous platform was outdated and difficult to use. This new platform has enabled our volunteers and members to organise their own in-person and online meet-ups – from walks in the park to group meals.

Between them, our volunteers and our members hosted 893 events in 2023, of which 253 were online. In person and online events offer friendship, support and understanding to our members – the special support that can only come from others who have faced the unique experience of losing your partner at a young age (see p8).

Our army of **volunteers** are at the heart of everything that WAY does. In 2023, we had a 2% increase in members choosing

to volunteer, with 170 people covering 196 roles, ensuring that our members are supported through digital platforms and WAY's 62 home groups (see p10).

Our **campaign** work has also been bearing fruit. In February 2023, we celebrated a historic success when cohabiting parents with dependent children were finally able to access bereavement benefit support following the death of their partner (see p9). This was the culmination of more than a decade of campaigning and we continue to campaign for the rights of young widowed people across the UK.

WAY continued to work alongside other bereavement charities and networks to achieve our shared goals. We were delighted to announce our new strategic partnerships with **Irwin Mitchell Solicitors** and child bereavement charity **Winston's Wish** in 2023, with the goal of extending our advice and support for all WAY members (see p15).

WAY is incredibly fortunate to have so many people who are passionate about supporting our charity. We are sincerely grateful to all of our committed volunteers, trustees and dedicated staff team, who provide the structure for the charity's day-to-day operations. And we'd like to say a huge thank you to WAY's incredible fundraisers, donors and corporate partners without whom WAY simply could not operate.

Finally, and most significantly: thank you to our wonderful community of members, who are at the heart of everything we do.

Stephanie Patrick
Chief Executive

Joanna Sedley-Burke
Chair of the Board of Trustees

* Based on feedback from 379 members in WAY's Impact Survey 2023

** Based on ONS death figures 2022

Our Story

94% of WAY members said that WAY membership is good/somewhat good value for money.*

WAY is the only national charity in the UK for people aged 50 or under when their partner died.

Founded in 1997, it's a club that nobody wants to be eligible to join, but we are so glad that our members find us. We provide a safe space for people who have been widowed at a young age – offering friendship, support and understanding.

WAY offers a unique peer-to-peer support network, led by volunteers who have all been bereaved at a young age themselves so they understand exactly what other members are going through.

As well as offering a secure members only website and opportunities to meet and chat online and in person, our members also have access to a confidential telephone support line offering bereavement support, legal, financial and health advice.

WAY also raises awareness of issues affecting those widowed young, campaigns on current issues such as changes to bereavement benefits and seeks out opportunities to publicise the existence of the charity wherever possible, through the media and other avenues, to show that there is support out there to help people navigate life after loss.

"When I found WAY, they helped me so much with support and friendship. Just knowing there were others who were going through what I was going through made it more bearable... I have found their peer-to-peer support invaluable."

Carol (bottom right), WAY member and fundraiser



* Based on survey responses for 2023 from 304 members in our May 2024 Impact Survey.

WAY impacted the lives of
4,650
young widows in 2023



helping them to navigate
their bereavement by
offering friendship,
support and
understanding.



What WAY does



WAY members organised **893**
in person and virtual events in 2023.



170 amazing volunteers
helped to support our work throughout the year.

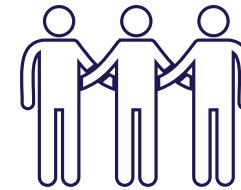


Generous supporters raised **£137,217**,
helping us to reach more people in need of support.



157 young widowed people were gifted annual
membership through our Memorial Fund.

How WAY helped



79% of members found
that meeting people in the
same situation has helped.*



Our small team of
5 employed
members of staff
continued to support
our members.



81% of members felt
that they had better
knowledge about grief and
bereavement.*



83% felt less isolated.*



More than
30,000 people
helped us to
spread the word by
following us across
our social media
channels.

121,029
separate
communications
sent out to our
members
throughout the year.

113 pieces of
press coverage
were generated
throughout the year.



72,617 people
visited our website
in 2023.

* Based on survey responses for 2023 from 304 members in our May 2024 Impact Survey.

Our Members

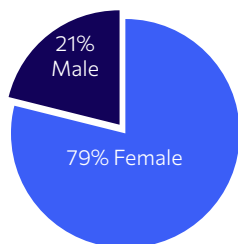
1,638 new members joined WAY's peer support network in 2023.



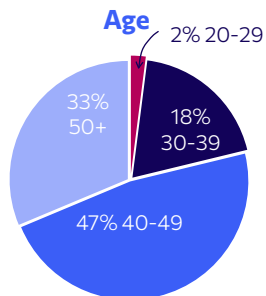
of members renewed their membership.

Demographics

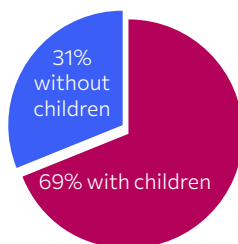
Gender



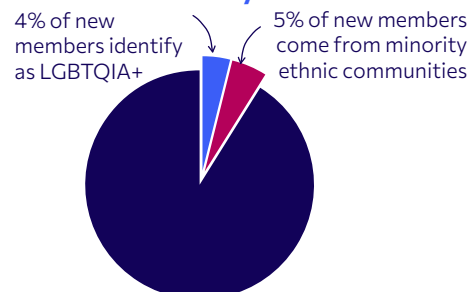
Age



With/without children



Diversity



Our Member Services

WAY continued to provide a range of vital services and support for all of our members as they navigate their bereavement journey, including:



We unveiled our new Members Hub in September 2023, which listed **893** events, and allowed members to connect and communicate privately with each other, as well as offering a wide range of geographical and individual interest groups.



WAY members and volunteers organised **253** online events.



Our closed Facebook group and a large range of subgroups were accessed by **65%** of members.



More than **290** people made use of the telephone support line offering counselling services, legal and financial advice.



68% of members who used the telephone counselling service found it helpful.*



109 events for new members were held.



157 members were supported financially through our Memorial Fund.

* Based on survey responses for 2023 from 304 members in our May 2024 Impact Survey.

"Knowing that WAY has a tailored telephone support line for us to use is really fantastic... It has been a comfort knowing that there is somebody available, just a telephone call away. I feel safer somehow knowing there is another human being available to listen to me cry and grieve. No advice, no judgement, just there for you."

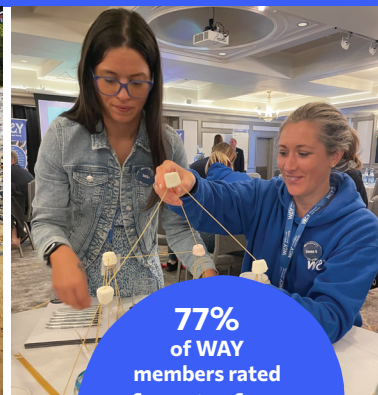
Hannah, WAY Member

"I want you to know that WAY helped me in ways I am still only now discovering. I'm still working my way back to a form of normal myself. There are still hard days and weeks but, in the main, life feels easier now than a year ago."

Steve, WAY member



Events



77%
of WAY
members rated
face-to-face
meetings
as one of the top five
WAY services*

WAY members have been busy getting together in parks, pubs and cafes across the UK – as well as meeting for online bingo, quizzes, yoga and book groups. Many events are organised by members and volunteers in our 62 home groups, which stretch from Scotland to Cornwall.

WAY's Operations Team also organised five national events during the year for members across the country to get together with other young widowed people and their families:

Big Picnic weekend

The sun came out for WAY's Big Picnic weekend in May, enticing more than 400 WAY members, friends and family to roll out their picnic blankets at 38 picturesque picnic locations from North Wales to Norfolk and from Jersey to Aberdeen.

Weekends aWAY

More than 60 WAY members and children headed to **PGL Caythorpe Court** near Grantham for a weekend of adventure in February. It was a great opportunity for WAY members and their families to spend some time in the company of other people who understand what they're going through.

WAY returned to the **Pembrokeshire Coast** for the second year in early May: it was an action-packed couple of days and 15 members had the chance to enjoy the amazing countryside and do something completely different, while finding support and friendship.

In June, 55 members and children got together in **Derbyshire** over the Father's Day weekend to make new memories.

In September, more than 100 members headed to Bristol for the charity's biggest annual gathering – our **Annual General Meeting**, which included a dinner dance.

"This was my first weekend away without my husband. I think I felt safe enough to enjoy it as I was around lovely people that just get it.... I had such a lovely weekend. If someone had told me a month ago that I'd be up dancing and singing, I would have thought they were crazy."

Hayley, WAY member and AGM attendee

Campaigning for Change

It's core to WAY's mission to raise awareness and understanding among the public of the needs of people who are widowed and young – and to campaign on their behalf.

Campaign success

After a decade-long campaign, from February 2023, bereavement benefit payments were finally extended to non-married cohabiting couples with dependent children.

This followed rulings from both the High Court and Supreme Court that found it was against the human rights of the children involved to discriminate against them based on their parent's marital status.

As of 9 February 2023, bereaved cohabiting couples with dependent children can apply for and receive Bereavement Support Payments, in the same way as those who are married or in a civil partnership, to help them cope with the financial challenges of such a significant family bereavement.

As many as 20,000 bereaved parents were also able to submit a claim for retrospective payments worth several thousand pounds.

We were thrilled about this campaign success and continue to campaign on behalf of young widowed people across the UK to make sure their voices are being heard.

We are calling for:

- Bereavement Support Payments to be extended beyond 18 months and uprated in line with inflation.
- Bereavement Support Payments to be extended to cohabiting couples without children.
- National Insurance eligibility to be reconsidered for Bereavement Support Payment applicants.

Blank Space campaign

Our Blank Space campaign is also calling for the birth registration process to be made simpler and more compassionate for mothers whose partner died before their baby's birth was registered. We don't believe it's fair that some babies have a blank space on their birth certificate where their father's name should be.



Blank Space: Birth certificate equality for bereaved parents

"WAY has been a brilliant support in all of this and the campaigning has made a very real difference... It was so incredible to see, after all these years, that unmarried widowed parents will now be able to claim a benefit that was denied to us until now."

Elanor, WAY member

Our Volunteers



WAY was built on volunteering and volunteers continue to help drive forward progressive change while supporting members in a variety of different ways. WAY welcomes volunteers from all over the UK and embraces diversity amongst its volunteer community in all its forms. Volunteering with WAY really is the ultimate in peer support.

At the end of 2023, WAY had 170 volunteers covering 196 different roles. These included the new role of Outreach Volunteers, who help to regularly spread the word about WAY in their local communities, either by attending local events or attending bereavement networks where they can share WAY's work and find out about the work of other bereavement organisations.

WAY continued the work of our Diversity Working Groups. The goal of raising awareness of diversity and inclusivity was evident through our members and volunteers waving WAY's Pride flag at several UK Pride events and participating in activities during Black History Month. We also provided tailored diversity training for WAY's volunteers both in person and online.

With volunteers based across the UK, it can be challenging to bring volunteers together. However, there were several opportunities in 2023 as WAY's Volunteer Manager travelled to different locations to meet some of our volunteers for opportunities to engage in helpful discussions and training sessions. (Thanks to our partners at Irwin Mitchell Solicitors, who offered some of its office space to host these sessions.)



170 volunteers covered **196** volunteering roles – with some volunteers helping in multiple roles.



93% of members have volunteers in their local areas.



83% of new members reported in their three-month survey that they had been welcomed by a volunteer in the area.

"Since starting volunteering, I have organised mostly weekend events so people with and without children can come... I would not have gone to many of these places if it was not for WAY. Whenever I feel lonely, there is someone to talk to and share thoughts and feelings with. As this is a peer-to-peer organisation, each volunteer is helping members – whatever stage of the grieving process they are at – to cope with life."

Kristine, WAY volunteer and recipient of our 2023 Mandy Burrows Award

Raising Funds for WAY



WAY does not receive any government funding, so we rely entirely on memberships, donations and fundraising to support our members. In 2023, our supporters achieved some remarkable fundraising feats, and collectively raised an impressive £137,217* for WAY.

Here are some of the highlights:

- Two teams of intrepid WAY members went head to head with our supporters from Irwin Mitchell Solicitors at the Kingston-upon-Thames **Dragon Boat Race** in July – raising more than £5,000.
- WAY member Carol raised more than £4,700 cycling 100 miles through the heart of London by taking part in the **RideLondon** event.
- WAY supporters Nick (pictured right) and Margaret raised more than £2,300 by taking on the **London Marathon** in April, while fundraising volunteer Chantal raised over £1,600 for WAY in the **Marathon de la Loire** in France.
- Chantal also raised £1,000 by taking part in the **Bournemouth Half Marathon**.
- Not prepared to be outdone, WAY supporter Matt ran a gruelling **seven marathons** over seven days in memory of his brother-in-law Clax – raising £4,400.
- WAY member Kass raised more than £400 by taking part in a **Winter Walk** for WAY; and Ben, Claire and Karli raised an impressive £1,600 through the **London to Brighton** Ultra Challenge.
- WAY member Natalie raised £350 by jumping from a plane in October.



Huge thanks to all our fantastic fundraisers who help make our work possible!

We'd also like to thank the following companies and foundations that have supported WAY in 2023:



• **Irwin Mitchell Solicitors**, who joined in our Dragon Boat Race and our Santa run – raising £858 – and the Irwin Mitchell Charitable Foundation awarded a £10,000 grant which was used to boost our Memorial Fund.



• A team from **CrossCountry Trains**, who got on board with WAY's fundraising and raised more than £4,000.



• 18 colleagues from **Mainstay Recruitment**, who took on an epic Snowdon challenge to raise funds and awareness for WAY, raising a fabulous £3,145. Two Mainstay team members also raised £550 in a fearless skydive.



• **Purple Goat Agency**, whose fundraising crowdfunder raised more than £14,000.

• WAY also received two donations totalling £24,000 through the Institute of Cemetery and Crematorium Recycling (ICCCM) from **Mintlyn Crematorium** in West Norfolk and **Burnley Crematorium**.

How your support helps

£5

pays for access to the members area of our website

£10

pays for a member to access our helpline for a year

£30

pays for a year's funded membership to WAY

£40

pays to train a WAY volunteer

£100

pays for a member to access a funded place on a WAY weekend break

If you're interested in fundraising, please get in touch at fundraising@widowedandyoung.org.uk

* All figures include Gift Aid.

Accounts to the end of December 2023 Income & Expenditure Account

	2023	2022
Income	£	£
Membership Fees	121,080	120,675
Donations & Fundraising	107,421	105,654
Other Income	2,735	2,799
Gift Aid	29,796	35,860
TOTAL INCOME	261,032	264,988
Expenditure		
Staff Costs	210,416	191,137
Other Office/Admin Costs	24,951	29,638
Publications/Media/PR	44,624	51,305
Website	22,926	22,415
Helpline	18,996	8,663
Memorial Fund	5,230	5,635
Other	5,860	9,163
TOTAL EXPENDITURE	333,003	317,956
Net Surplus/(Deficit) for the year*	(71,971)	(52,968)

Balance Sheet

	2023	
CURRENT ASSETS	£	£
Fixed Assets		
IT	36,816	
Debtors		
Gift Aid	5,000	
Prepayments	1,113	
		42,929
Current Accounts	153,577	
Less Uncleared Payments/(Credits)	(6,322)	
		147,255
Set Aside Funds		
Memorial Fund	(1,770)	
Gift Membership	(650)	
		(2,420)
CURRENT LIABILITIES AND DEFERRED INCOME		
Liabilities	(12,678)	
Events	(3,963)	
		(16,641)
TOTAL Assets		171,123
FINANCED BY:		
Accumulated Surplus Brought Forward		243,094
Net Deficit/(Surplus) for the year*		(71,971)
		171,123

* The charity's policy, as decided by the Board of Trustees, is to maintain WAY's reserves at the level of 50% of anticipated running costs for the coming year. With total funds of just under £180k at the end of 2023, our reserves remain above that level.

In previous years, it has been a key challenge for the charity to identify how to best use surplus funds to support our members and to reach more of those eligible to become members. In 2022 and 2023, the Board invested in new staff as well as improving our website for members. This resulted in a planned deficit during 2023 of £71,971 (and £52,968 in 2022). However, this level of deficit is not expected to recur.



At our 2023 AGM in Bristol, WAY members approved the re-appointment of Trustee **Louise Dodds**, who is a member of WAY in the North East.

AGM attendees also approved the appointment of new Trustees **Bobbie Kelly** and **Marcos Eleftheriou**, who were both co-opted onto the Board earlier in the year.

Bill James stood down as Treasurer after seven years as a Trustee; and **Rammi Janack** stood down after one year in post.

Trustee

Stuart Scarbrough
Bill James (Treasurer)
Graham Briscoe
Jo Sedley-Burke (Chair)
Kate Siegler
Louise Dodds
Mike Etherington
Rammi Janack
Bobbie Kelly
Marcos Eleftheriou

Appointed

2016
2017 (stood down in 2023)
2018
2018
2019
2019
2020
2022 (stood down in 2023)
2023
2023



"I applied to become a Trustee of WAY to say thank you and to give something back to the charity that has helped me. I also work for a mental health charity in communications, and I intend to use my skills and ideas to raise WAY's profile and help the charity to reach more widowed people at an earlier stage in their journeys."

Bobbie, WAY member and Trustee

Strategy and Charity Objectives

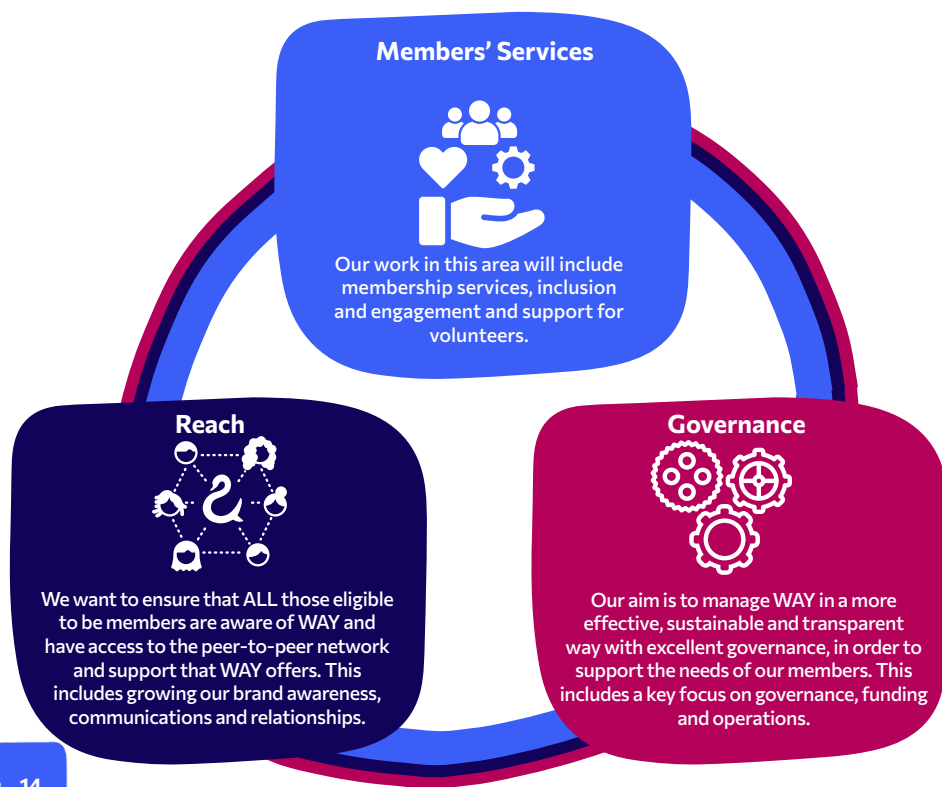
WAY members help to shape our future and, after going through an organisational transformation in 2018, WAY carried out a range of consultations with our members to help inform the direction our charity should take in the future. We carried out an extensive survey of our members and volunteers to work out the best way forward as our charity continues to grow.

From this, our 2021-2026 five-year Strategic Plan was born, which reflects the views of all our members and volunteers to make sure the charity meets their needs, to draw out our long-term ambitions, to help outline our organisational priorities and to reflect our new structure.

WAY's Strategic Plan was developed in line with recommendations drawn from reports and takes on feedback from our members, staff and volunteers.

We would like to thank everyone who offered their valuable input – from completing WAY surveys to attending meetings, from talking to our team to taking part in working groups.

Our strategic plan is split into three key areas:



Our Strategic Partnerships

Irwin Mitchell

In December 2023, we were pleased to announce our strategic partnership with Irwin Mitchell Solicitors, who have been supporting WAY with fundraising and legal advice over the past four years.

Irwin Mitchell have been fantastic supporters of WAY, taking part in our Big Picnics, giving us opportunities to speak and share our work with their company, taking part in various fundraising events, offering meeting spaces and supporting our campaign work.

As part of our partnership, Irwin Mitchell is taking over the financial and legal aspect of our telephone support line and they will be offering tailored support through a series of webinars.



Winston's Wish

Together, WAY and Winston's Wish are partnering to provide full circle support for the whole family following a bereavement. As well as referring bereaved families to each other's services, the two charities are joining forces to provide tips and advice to offer help for the parents they support and their children.

We are also partnering on campaign and policy work, advocating for improved services and experiences for bereaved families both now and in the future.



"Having access to over 4,600 members who understand what I'm feeling and can support me through tough moments and celebrate my successes is invaluable, whether that be online through the Members Hub or in person at meet ups."

Kathryn, WAY member and volunteer



WAY's Mission

To offer unique support for those aged 50 or under when their partner died, through an inclusive peer-led network based upon mutual self-help. WAY also campaigns to raise awareness and understanding of the issues affecting those widowed young, and to influence relevant policy.

WAY's Vision

To ensure ALL those eligible to be members are aware of WAY and have access to the peer-to-peer network and support that WAY offers.

WAY's Values

Caring

Respectful

Innovative

Valued

Transparent

www.widowedandyoung.org.uk

Registered Charity No: 1164988

Email: enquiries@widowedandyoung.org.uk | Telephone: 0300 201 0051

Registered Address: Advantage House, Stowe Court, Stowe Street, Lichfield WS13 6AQ



Charity Registration Number 1164988



**FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 DECEMBER 2023**

3S Accountancy Services
Chartered Accountants

WAY Widowed and Young

FINANCIAL STATEMENTS

YEAR ENDED 31 DECEMBER 2023

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MEMBERS OF THE BOARD AND PROFESSIONAL ADVISERS

Trustees	Trustees who served during the year and up to the date of this report were as follows:	
	Graham Briscoe	
	Ramanjit Janack	<i>Resigned 29/07/2023</i>
	Marcos Eleftheriou	Appointed 10.12.2022
	Louise Jane Dodds	
	Mike Etherington	
	William Thomas James	<i>Resigned 23/09/2023</i>
	Katherine Denise Siegler	
	Stuart Alan Scarbrough	
	Joanna Sedley-Burke	Chair
	Roberta Kelly	Appointed 10.12.2022
Secretary	Current Vacancy	
Key management personnel	Stephanie Patrick	Chief Executive appointed Aug 21
Registered office	Advantage House Stowe Court Stowe Street Lichfield WS13 6AQ	
Trading address	N/A	
Accountants	3S Accountancy Services Chartered Accountants 5-8 Priestgate Darlington DL1 1NL	
Bankers	CAF Bank Limited 25 Kings Hill Avenue Kings Hill, West Malling Kent ME19 4JQ	
Charity number	1164988	

WAY Widowed and Young
ANNUAL REPORT OF THE TRUSTEES
YEAR ENDED 31 DECEMBER 2023

The trustees present their report together with the financial statements of the charity for the year ended 31 December 2023. The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's constitution, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published on 16 July 2014. Legal and administrative information set out on page 1 forms part of this report.

STRUCTURE GOVERNANCE AND MANAGEMENT

WAY was established in 1997 and is a Charitable Incorporated Organisation (CIO) with an association Governing Document (the constitution). This was registered on 29 December 2015, amended on 4th March 2017, 18th September 2021 and 10th September 2022. The Charitable Objects were updated on 10th September 2022 to include 'gender, race and religion'. The trustees meet at least five times a year, trustees serving during the period 1st January 2022 to 31st December 2022 are listed on page 1. All trustees give their time voluntarily and receive no remuneration for duties carried out as a trustee. However, trustees claimed out of pocket expenses while undertaking volunteer duties during the year and reimbursement of any expenditure incurred purchasing goods and services required by the charity. The trustees may also be members of the charity but this entitles them only to voting rights. The trustees have no beneficial interest in the charity.

At every Annual General Meeting, trustees who have served a term of 3 years are required to retire, but they are permitted to be re-elected or re-appointed by the members for a maximum of 3 consecutive terms or 9 years. At any one time, the constitution stipulates there should be a minimum of five Trustees. Members are also able to appoint two Trustees that are not WAY members.

OBJECTIVES

The objectives of the Charity are:

- i. To advance the education of the public to raise the awareness of the needs of people who are widowed and young.
- ii. to relieve persons in need, following bereavement by offering a peer-to-peer support network for anyone aged 50 or under, at time of bereavement, who is overcoming the loss of a partner, married or not, with or without children, inclusive of sexual orientation, gender, race and religion.

ACHIEVEMENTS AND PERFORMANCE

WAY is the only national charity in the UK for people aged 50 or under when their partner died. It's a peer-to-peer support group operating with a network of volunteers who have been bereaved at a young age themselves, so they understand exactly what other members are going through.

WAY was founded in 1997 and had 4,658 members across England, Wales, Scotland and Northern Ireland at the end of 2023. The charity aims to provide peer-to-peer support to young widowed people – married or not, with or without children, inclusive of their sexual orientation, gender, race and religion – as they adjust to life after the death of their partner.

In 2023 we faced a new challenge as the cost-of-living crisis overtook the nation. We met the continuing demand for our services and were able to support members who were struggling to meet the cost of the membership fee by doubling the amount available in WAY's Memorial Fund. We built strategic partnerships with Irwin Mitchell Solicitors and child bereavement charity Winston's Wish so that we could extend our advice and support offer to WAY members. Community Fundraising was lower than expected and so we were unable to renew the contract for WAY's Community Fundraiser. After a decade-long campaign cohabiting parents with dependent children who need support following the death of their partner were finally able to apply for bereavement benefits. Our substantial reserves still allowed us to continue to invest funds in developing member services and activities to increase the reach of the charity. Key investments were the development of the new members hub and the continued salary of a Digital Market Officer. Whilst it is difficult to summarise everything that WAY has been involved in over the last 12 months, we have included key achievements below.

Membership – the year closed with 4,658 members, which included 1,638 new members. We have seen an increase in member retention rates, with 70% choosing to renew their membership this year. We are pleased that the time we have taken to listen to our members and respond to their needs is really helping to create a service that members truly value.

Volunteers - WAY ended the year with 170 volunteers across the UK, up 2% year-on-year. WAY volunteers are the backbone of the charity and WAY is incredibly fortunate to have so many members who are so passionate about supporting WAY. WAY's Volunteer Manager has provided invaluable support to our volunteers and has offered them chance to network and access training. There has also been the development of new roles such as social media Facebook Admins for WAY's many closed WAY Facebook groups which provide invaluable support to our members.

Through our members-only website, our volunteers and members can organise their own in-person meet-ups - from walks in the park, to group meals. Virtual events continued to happen as well and between them, our volunteers and our members there were 893 events hosted in 2023, of which 253 were online.

Website – Over the last few years, many members have feedback that the members platform is difficult to use, and the charity has worked hard to raise funds to invest in this area of member services. The Working Website Group responded by developing plans for a new platform and a tender process followed in 2022 which resulted in BinaryFold4 being appointed to deliver this project. Work continued for the first 6 months of the year and members were fully included in the process, via consultation, testing and focus groups. The new Members Hub was launched on 1st October 2023. Since then we have continued to bed in this new system and make improvements to the members area and the public facing pages.

Social Media - We continued to make great strides on all our social media platforms, having a combined following which exceeds 30k. All of our social media platforms showed a strong performance in 2023, helping us to reach out to new audiences.

Media Coverage –WAY was featured in 113 media opportunities throughout the year including TV, Press and Radio, which is higher than the previous year by 55%.

Awareness-raising - WAY continued to work alongside other bereavement charities and networks to achieve our shared goals. Our staff spoke about WAY at various conferences which included Grief Loss Conference in Liverpool and Grief Care Annual Conference in London. WAY hosted a stand at various national events including the National Suicide Conference, National Hospice Conference and Scotty's Adventure Day which directly reached over 300 bereavement professionals and led to relationships being developed at various hospices. WAY also continues working alongside other bereavement charities as part of the National Bereavement Alliance and to promote National Grief Awareness Week.

Fundraising- 2023 proved to be a challenging year for fundraising due to the cost of living crisis meaning that people have had less to give. The year saw a variety of individual virtual fundraisers and a growth in Facebook Birthday Fundraisers. WAY members ran several successful fundraising campaigns, including participation in events such as the London2Brighton Walk and London Marathon. Corporate partners who also raised funds included Irwin Mitchell, Mainstay Recruitment and Purple Goat.

Strategic plan – The staff team and trustees continued to successfully progress through the set KPIs of WAY's five-year strategic plan which was unveiled to members in early spring 2021.

WAY AGM 2023

Every year since WAY was launched in 1997, the charity has held an Annual General Meeting (AGM). The annual gathering incorporating the AGM is the biggest WAY event of the year and has become a fixed and key point in the charity's social calendar. WAY's 2023 AGM was held at the Marriot Hotel in Bristol and was attended by over 92 members in person and 15 virtually.

Income

As previously, income for the current year came from three main sources:

- Membership Fees
- Fundraising
- Donations and Grants

The continuing growth of our membership has been such that we now have over 4,650 members for the first time. Income from new memberships and renewals has therefore grown to £121,080 (2022 - £120,675). Membership fundraising activities showed a decline compared to the previous year at £32,982 (2022 £49,256) which reflects the 'cost of living' crisis and is a common trend across the third sector. And during 2023, despite the sector-wide difficulties in generating charitable donations, we saw only a small decline in revenue from external donations and grants to £74,439 (2022 £56,408)

As always we wish to take this opportunity to say thank you to all those who have worked hard to raise funds or make a donation in 2023. This support is invaluable in providing the resources needed to continue the charity's work.

Public benefit

The trustees have complied with the duty in the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission.

Reserves

Reserves - The Charity's policy, as decided by the Board of Trustees is to maintain reserves at the level of 50% of anticipated running costs for the coming year. With total funds of just under £180K at the end of the year, our reserves remain above that level.

It has, for a while, been a key challenge for the Charity to identify how and where to best use surplus funds to support our members and to reach more of those eligible to become members. To this end the Board has invested during 2023 in both new staff and in improving our website offering. This has resulted in a new deficit during the year of £71,971 (2022 deficit of £53,758) but this level of deficit is not expected to recur.

Risk management

The trustees have assessed the risks to which the charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks

Statement of Trustees' Responsibilities

The charity trustees are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law and United Kingdom accounting standards for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements the trustees are required to:

- a) select suitable accounting policies and then apply them consistently;
- b) observe the methods and principles in the applicable Charities SORP;
- c) make judgements and estimates that are reasonable and prudent;
- d) state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- e) prepare the Financial Statements on a going concern basis unless it is inappropriate to assume that the charity will continue operating.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the Financial Statements comply with the Charities Act 2011 and the applicable Charity (Accounts and Reports) Regulations, and the provisions of the trust deed. They are also responsible for safeguarding the assets of the company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the board on 13th July 2024 and signed on its behalf



Joanna Sedley-Burke
Chair

**WAY Widowed and Young
INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF WAY WIDOWED AND YOUNG
YEAR ENDED 31 DECEMBER 2023**

I report on the accounts of WAY Widowed and Young (the Trust) for the year ended 31 December 2023, which are set out on pages 5 to 10.

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

Respective responsibilities of trustees and examiner

Respective responsibilities of trustees and examiner

1. To give the necessary instructions to the qualified examiners to undertake the examination by using a qualified number of the Institute of Chartered Accountants in England and Wales (ICAEW). Where satisfied

2. To examine the accounts under section 145 of the 2011 Act

3. To follow the procedures laid down in the general directions given by the Charity Commission under Section 145(5)(b) of the 2011 Act; and

4. To state whether particular matters have come to my attention.

Basis of independent examiner's report

the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures

Independent examiner's statement

In connection with my examination, no material matters have come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

(2) to keep accounting records in accordance with section 130 of the 2011 Act; or
 (3) requirements concerning the format and content of accounts set out in the Companies (Accounts and Reports) Regulations 2008 (other than any requirement that the accounts give a 'true and fair' view which is not a matter that has not been met; and
 (4) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Mitbaube

3S Accountancy Services, Chartered Accountants

5-8 Priestgate

5-8 Priest
Darlington

Darlington
DL1 1NI

Date: . 13th July 2024.

WAY Widowed and Young**STATEMENT OF FINANCIAL ACTIVITIES (incorporating Income and Expenditure Account)****YEAR ENDED 31 DECEMBER 2023**

	Note	Unrestricted £	Restricted £	2023 £	2022 £
Incoming Resources					
Income from:					
Donations and legacies	2	249,675	10,000	259,675	263,704
Other trading activities	3	1,357	-	1,357	1,283
Total		251,032	10,000	261,032	264,988
Resources Expended					
Expenditure on:					
Raising funds		26,015	-	26,015	32,929
Charitable activities		298,757	8,230	306,987	285,027
Total	4	324,772	8,230	333,002	317,955
Net income / (expenditure)		(73,740)	1,770	(71,970)	(52,968)
Transfers between funds		-	-	-	-
Net movement in funds		(73,740)	1,770	(71,970)	(52,968)
Fund balances brought forward at 1 JANUARY 2022		243,094	-	243,094	296,061
Fund balances carried forward at 31 DECEMBER 2023	10	169,353	1,770	171,123	243,094

The statement of financial activities includes all gains and losses recognised in the year.

WAY Widowed and Young

BALANCE SHEET

AS AT 31 DECEMBER 2023

	Note	2023		2022	
		£	£	£	£
Fixed Assets					
Intangible Assets	11		35,709		20,267
Tangible Assets	11		<u>1,107</u>		<u>1,865</u>
			36,816		22,132
Current assets					
Debtors and prepayments	8	6,113		16,733	
Cash at bank and in hand		<u>163,018</u>		<u>205,990</u>	
		169,131		222,722	
Creditors					
Amounts falling due within one year	9	<u>(34,824)</u>		<u>(1,760)</u>	
Net current assets			134,307		220,962
Net assets			<u>171,123</u>		<u>243,094</u>
Funds					
Unrestricted Funds			169,353		243,094
Restricted funds			<u>1,770</u>		<u>-</u>
Total charity funds	10		<u>171,123</u>		<u>243,094</u>

the net assets have changed by £1770 - should be same, just split out between unrestricted and restricted?

These financial statements were approved and signed by the trustees and authorised for issue on



Joanna Sedley-Burke
Chair

NOTES TO THE FINANCIAL STATEMENTS

YEAR ENDED 31 DECEMBER 2023

1. Accounting policies

The following accounting policies have been used consistently in dealing with items which are considered material in relation to the charity's accounts.

- (i) The accounts have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities applicable to charities preparing their accounts in accordance with Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) issued on 16 July 2014 and with the Charities Act 2011.

The accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the notes to these accounts.

The charity constitutes a public benefit entity as defined by FRS102.

(ii) Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes.

(iii) Incoming resources

Income is accounted for on an accruals basis. Grants are recognised as an incoming resource when the conditions for the receipt have been met and are accounted for in accordance with the headings they have been allocated to on a basis consistent with the use of the resources.

(iv) Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to the expenditure, it is probable settlement will be required and the amount of the obligation can be measured reliably.

(v) Tangible and Intangible Assets

Tangible and intangible assets are stated at cost less accumulated depreciation. The only tangible asset of the charity is computer equipment and this is capitalised at cost and depreciated over three years reflecting the expected useful life. Intangible assets reflect the cost of the development of the new member portal and is being depreciated over three years from the date at which the new portal was launched, which was October 2023

2. Donations and legacies

	Unrestricted	Restricted	2023	2022
	£	£	£	£
Donations and Grants	64,439	10,000	74,439	56,408
Gift Aid	29,796	-	29,796	35,860
Membership Subscriptions	121,080	-	121,080	120,675
Fundraising	32,982	-	32,982	49,246
Other	1,378	-	1,378	1,516
	249,675	10,000	259,675	263,704

In 2023 a grant of £10,000 was classed as restricted funds.

In 2022 all income from donations and legacies was unrestricted.

NOTES TO THE FINANCIAL STATEMENTS

YEAR ENDED 31 DECEMBER 2023

3. Other trading activities

	Unrestricted £	Restricted £	2023 £	2022 £
Income from activities				
Merchandise	1,357	-	1,357	1,283
	1,357	-	1,357	1,283

In 2023 and 2022 all income from activities was unrestricted.

4. Analysis of total resources expended

	Unrestricted £	Restricted £	2023 £	2022 £
Cost of generating funds				
Media & PR	26,015	1,800	27,815	32,929
	26,015	1,800	27,815	32,929
Charitable Activities				
Staff Costs	209,216	1,200	210,416	191,137
Member Services - WAY Forward, Helpline etc	35,805	-	35,805	27,039
Website Maintenance	28,088	-	28,088	25,745
Merchandise	2,863	-	2,863	5,278
Administration	8,205	-	8,205	9,897
Bank charges & other fees	5,071	-	5,071	7,117
Insurance	2,111	-	2,111	1,820
Independent Examination & Legal Fees	780	-	780	1,788
Volunteer Costs	2,014	-	2,014	2,428
Members Events	3,845	5,230	9,075	12,370
Project Swan	-	-	-	-
Depreciation	758	-	758	408
	298,757	6,430	305,187	285,027
	324,772	8,230	333,002	317,955

5. Governance

	2023 £	2022 £
Accountancy and professional fees	780	720
	780	720

6. Trustees' remuneration

Except below, the trustees received £nil (2022: £nil) worth of emoluments during the period.

Expenses amounting to £573 (2022: £1,603) were reimbursed in 2023

NOTES TO THE FINANCIAL STATEMENTS

YEAR ENDED 31 DECEMBER 2023

7. Staff costs

	2023	2022
	£	£
Wages and Salaries	180,542	162,975
Employer National Insurance	15,040	11,973
Employer Pension Contributions (Defined Contribution Scheme)	4,318	3,882
Temporary Staff	-	-
Other Payroll costs	10,516	12,307
TOTAL	210,416	191,137

By the end of 2023 there were five permanent members of staff (2022: 6).

8. Debtors

	2023	2022
	£	£
Gift Aid	5,000	7,991
Other	1,113	8,742
	6,113	16,733

9 Creditors: amounts falling due within one year

	2023	2022
	£	£
Accruals and deferred income	34,824	1,760 Audit, Events, Gift Mship
Other creditors	-	-
	34,824	1,760

10 Statement of Funds

	Balance b/fwd £	Incoming £	Outgoing £	Transfers £	Balance c/fwd £
Unrestricted funds - general	83,694	250,407	(324,397)	(5,500)	4,203
Designated - Memorial Fund	-	-	-	-	-
Designated - Gift Membership	400	625	(375)	-	650
Designated - Operating Fund	159,000			5,500	164,500
Total unrestricted funds	<u>243,094</u>	<u>251,032</u>	<u>(324,772)</u>	<u>-</u>	<u>169,353</u>
RESTRICTED FUNDS					
	-	10,000	(8,230)	-	1,770
Total restricted funds	<u>-</u>	<u>10,000</u>	<u>(8,230)</u>	<u>-</u>	<u>1,770</u>
TOTAL FUNDS	<u>243,094</u>	<u>261,032</u>	<u>(333,002)</u>	<u>-</u>	<u>171,123</u>

The designated Gift Membership represents funds received to cover membership costs for the recipient of the voucher

The designated Operating Fund represents 50% of our operating costs in 2023, in line with our reserves policy

Made up of:

	2023			2022		
	Restricted	Unrestricted	Total	Restricted	Unrestricted	Total
Fixed assets	-	36,816	36,816	-	22,132	22,132
Current assets						
Stock	-	-	-	-	-	-
Debtors and prepayments	-	6,113	6,113	-	16,733	16,733
Cash at bank and in hand	10,000	153,018	163,018	-	205,990	205,990
	<u>10,000</u>	<u>159,131</u>	<u>169,131</u>	<u>-</u>	<u>222,722</u>	<u>222,722</u>
Creditors	-	(34,824)	(34,824)	-	(1,760)	(1,760)
	<u>10,000</u>	<u>161,123</u>	<u>171,123</u>	<u>-</u>	<u>243,094</u>	<u>243,094</u>

11 Fixed Assets

	Tangible	Intangible	
	IT equipment	Website	TOTAL
Cost			
As At 1 Jan 2023	2,273	20,267	22,540
Additions	-	18,895	18,895
Disposals	-	-	-
As at 31 December 2023	<u>2,273</u>	<u>39,162</u>	<u>41,435</u>
Depreciation			
As At 1 Jan 2023	408	-	408
Disposals	-	-	-
Depreciation / amortisation	758	3,453	4,211
Impairment	-	-	-
As at 31 December 2023	<u>1,166</u>	<u>3453</u>	<u>4,619</u>
Net Book Value at 31 December 2023	<u>1,107</u>	<u>35,709</u>	<u>36,816</u>
Net Book Value at 31 December 2022	<u>1,865</u>	<u>20,267</u>	<u>22,132</u>

WAY Widowed and Young
INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF WAY WIDOWED AND YOUNG
YEAR ENDED 31 DECEMBER 2023

I report on the accounts of WAY Widowed and Young (the Trust) for the year ended 31 December 2023, which are set out on pages 5 to 10.

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

Respective responsibilities of trustees and examiner

The trustees are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144 of the 2011 Act and that an independent examination is needed. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of the Institute of Chartered Accountants in England and Wales (ICAEW). Having satisfied myself that the charity is not subject to audit and is eligible for independent examination, 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)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the 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 seeking 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 material matters have 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 section 130 of the 2011 Act; or
- to prepare accounts which accord with the accounting records and comply with the accounting 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.



Catherine Milbanke BSc BFP FCA
3S Accountancy Services, Chartered Accountants
5-8 Priestgate
Darlington
DL1 1NL

Date: 13th July 2024