

Re-engage Crosby

England & Wales · Charity number 1171354

Details

Other names	AGE CONCERN CROSBY
Status	Registered
Legal form	CIO
Registered	2017-01-27
Register	View on the Charity Commission register

Contact

Address	Re-Engage PO Box 391 Great Yarmouth Norfolk NR30 9HX
Phone	020 7240 0630
Email	info@reengage.org.uk
Website	http://www.accrosby.co.uk/

Activities

Objects: TO PROMOTE THE RELIEF OF ELDERLY PEOPLE IN ANY MANNER WHICH NOW OR HEREAFTER MAY BE DEEMED BY LAW TO BE CHARITABLE IN AND AROUND THE SEFTON AREA IN PARTICULAR BY THE PROVISION AND OPERATION OF LUNCH CLUBS, ACTIVITIES, HOLIDAYS AND OUTINGS FOR OLDER PERSONS

Activities: We run 3 luncheon clubs a week including one for the housebound at the local Church Hall, providing social interaction and after lunch activities at regular intervals. We screen a monthly film at the local Community cinema for the over 60. We offer day trips and holidays for the elderly and housebound. We provide information and signposting for advice and support to the elderly and their carers

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, The Advancement Of Health Or Saving Of Lives, Disability
- **Who:** Elderly/old People

Geography

- Sefton

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31		£0	£0	-
2024-03-31		£300	£0	-
2023-03-31		£18	£0	-
2022-03-31	£6,790	£139,776		-
2021-03-31	£5,521	£18,672		-

Trustees

Name	Role	Appointed
Jonathan Upton	Chair	2022-05-26
Jennifer Nancy Willott		2024-10-27
Susan Scholes		2022-05-26

Re-engage Crosby

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YEAR ENDED 31 MARCH 2025

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Year ended 31 March 2025

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Year ended 31 March 2025



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 01	Month 04	Year 2024		Day 31	Month 03	Year 2025

Section A Reference and administration details

Charity name Re-engage Crosby

Other names charity is known by

Registered charity number (if any) 1171354

Charity's principal address 7 Bell Yard
London

Postcode WC2A 2JR

Names of the charity trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Jonathan Upton	Chair	Appointed 26 May 2022	
Susan Scholes		Appointed 26 May 2022	
Jennifer Willott		Appointed 27 October 2024	

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Section B Structure, governance, and management

RE-ENGAGE CROSBY

Year ended 31 March 2025

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Charitable Rules adopted January 2017
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Trustees are appointed by the board of Re-engage Ltd

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees.
- the charity's organisational structure and any wider network with which the charity works.
- relationship with any related parties.
- trustees' consideration of major risks and the system and procedures to manage them.

Section C

Objectives and activities

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

To promote the relief of elderly people in any manner which now or hereafter may be deemed by law to be charitable in and around the Sefton area by the provision and operation of lunch clubs, activities, holidays, and outings for older persons.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The trustees confirm that in reviewing and making decisions regarding our activities, we have regard to the Charity Commission's general guidance on public benefit.

RE-ENGAGE CROSBY

Year ended 31 March 2025

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grant making.
- policy programme related investment.
- contribution made by volunteers.

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Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The donation made to Re-engage Ltd has enabled Re-engage to continue providing core services in and around the Sefton area providing older people with opportunities to make new friendships and regain their social confidence.

Section E

Financial review

Brief statement of the charity's policy on reserves

As the charity has no expenditure commitments (e.g. no employees, property, other running costs) and its only expenditure going forward will be grants made from net assets held, the trustees see no need to hold reserves.

Details of any funds materially in deficit

N/A

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising).
- how expenditure has supported the key objectives of the charity.
- investment policy and objectives including any ethical investment policy adopted.

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Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees:

Signature(s)



Full name(s)

Jonathan Upton

Position

Chair of Trustees

Date

18 November 2025

RE-ENGAGE CROSBY

Year ended 31 March 2025

INCOME AND EXPENDITURE ACCOUNT

	Unrestricted Funds £	Endowment Funds £	Total 2025 £	Total 2024 £
INCOME				
Donations and legacies				
Donations	0	0	0	0
Charitable activities				
Trusts	0	0	0	0
Fundraising income				
Fundraising	0	0	0	0
Bank and investment income				
Bank interest	0	0	0	0
Other income	0	0	0	300
Total income	<u>0</u>	<u>0</u>	<u>0</u>	<u>300</u>
EXPENDITURE				
Charitable activities				
Donations (transfer of cash & assets to Re-engage)	0	0	0	0
Charitable activities	0	0	0	0
Support costs				
Management and administration	0	0	0	0
Total expenditure	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
NET INCOME / (EXPENDITURE)	0	0	0	300
FUNDS BFWD ON 1 APRIL 2023	<u>372</u>	<u>0</u>	<u>372</u>	<u>72</u>
FUNDS CFWD AT 31 MARCH 2024	<u>372</u>	<u>0</u>	<u>372</u>	<u>372</u>

RE-ENGAGE CROSBY

Year ended 31 March 2025

BALANCE SHEET

	2025		2024	
	£	£	£	£
NET CURRENT ASSETS				
Tangible assets		0		0
CURRENT ASSETS	0		0	
Debtors				
Cash at bank and in hand	372		372	
	<u>372</u>		<u>372</u>	
CREDITORS: Amounts falling due within one year	(372)		(372)	
	<u>0</u>		<u>0</u>	
NET CURRENT ASSETS		0		0
		<u>0</u>		<u>0</u>
NET ASSETS		0		0
		<u>0</u>		<u>0</u>
FUNDS				
Unrestricted funds		0	0	0
Restricted funds		0	0	0
		<u>0</u>	<u>0</u>	<u>0</u>
TOTAL FUNDS		0	0	0
		<u>0</u>	<u>0</u>	<u>0</u>

It is anticipated that a transfer of Re-engage Crosby's net assets to Re-engage Ltd will take place at the end of each financial year.

For the year ended 31 March 2025 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies.

No members have required the company to obtain an audit of its accounts for the year ended 31 March 2025 in accordance with section 476 of the Companies Act 2006.

The trustees acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

These financial statements were approved by the trustees on 18 November 2025 and signed on their behalf by:



Jonathan Upton
Trustee

Re-engage Crosby

England & Wales - Charity number 1171354

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YEAR ENDED 31 MARCH 2024

Charity Registration No: 1171354

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Year ended 31 March 2024



Trustees' Annual Report for the period

	Period start date			Period end date			
From	Day 01	Month 04	Year 2023	To	Day 31	Month 03	Year 2024

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

7 Bell Yard	
London	
Postcode	WC2A 2JR

Names of the charity trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Jonathan Upton	Chair	Appointed 26 May 2022	
Susan Scholes		Appointed 26 May 2022	

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance, and management

AGE CONCERN CROSBY

Year ended 31 March 2024

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Charitable Rules adopted January 2017
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Trustees are appointed by the board of Re-engage Ltd

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees.
- the charity's organisational structure and any wider network with which the charity works.
- relationship with any related parties.
- trustees' consideration of major risks and the system and procedures to manage them.

Section C Objectives and activities

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

To promote the relief of elderly people in any manner which now or hereafter may be deemed by law to be charitable in and around the Sefton area in particular by the provision and operation of lunch clubs, activities, holidays, and outings for older persons.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The trustees confirm that in reviewing and making decisions regarding our activities, we have regard to the Charity Commission's general guidance on public benefit.

AGE CONCERN CROSBY

Year ended 31 March 2024

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grant making.
- policy programme related investment.
- contribution made by volunteers.

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Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The donation made to Re-engage Ltd has enabled Re-engage to continue providing core services in and around the Sefton area providing older people with opportunities to make new friendships and regain their social confidence.

Section E

Financial review

Brief statement of the charity's policy on reserves

As the charity has no expenditure commitments (e.g. no employees, property, other running costs) and its only expenditure going forward will be grants made from net assets held, the trustees see no need to hold reserves.

Details of any funds materially in deficit

N/A

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising).
- how expenditure has supported the key objectives of the charity.
- investment policy and objectives including any ethical investment policy adopted.

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Section F Other optional information

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Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	<i>Jonathan Upton</i>	<i>Susan Scholes</i>
Full name(s)	Jonathan Upton	Susan Scholes
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	4 October 2024	

AGE CONCERN CROSBY

Year ended 31 March 2024

INCOME AND EXPENDITURE ACCOUNT

	Unrestricted Funds £	Endowment Funds £	Total 2024 £	Total 2023 £
INCOME				
Donations and legacies				
Donations	0	0	0	0
Charitable activities				
Trusts	0	0	0	0
Fundraising income				
Fundraising	0	0	0	0
Bank and investment income				
Bank interest	0	0	0	0
Other income	300	0	300	18
Total income	<u>300</u>	<u>0</u>	<u>300</u>	<u>18</u>
EXPENDITURE				
Charitable activities				
Donations (transfer of cash & assets to Re-engage)	0	0	0	0
Charitable activities	0	0	0	0
Support costs				
Management and administration	0	0	0	0
Total expenditure	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
NET INCOME / (EXPENDITURE)	300	0	300	18
FUNDS BFWD ON 1 APRIL 2023	<u>72</u>	<u>0</u>	<u>72</u>	<u>54</u>
FUNDS CFWD AT 31 MARCH 2024	<u>372</u>	<u>0</u>	<u>372</u>	<u>72</u>

AGE CONCERN CROSBY

Year ended 31 March 2024

BALANCE SHEET

	2024		2023	
	£	£	£	£
NET CURRENT ASSETS				
Tangible assets		0		0
CURRENT ASSETS	0		0	
Debtors				
Cash at bank and in hand	372		72	
	<u>372</u>		<u>72</u>	
CREDITORS: Amounts falling due within one year	<u>(372)</u>		<u>(72)</u>	
NET CURRENT ASSETS		0		0
NET ASSETS		<u>0</u>		<u>0</u>
FUNDS				
Unrestricted funds		0	0	0
Restricted funds		0	0	0
TOTAL FUNDS		<u>0</u>	<u>0</u>	<u>0</u>

It is anticipated that a transfer of Age Concern's net assets to Re-engage Ltd will take place at the end of each financial year.

For the year ended 31 March 2024 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies.

No members have required the company to obtain an audit of its accounts for the year ended 31 March 2024 in accordance with section 476 of the Companies Act 2006.

The trustees acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

These financial statements were approved by the trustees on 4 October 2024 and signed on their behalf by:

Jonathan Upton

Jonathan Upton
Trustee

Susan Scholes

Susan Scholes
Trustee

Re-engage Crosby

England & Wales - Charity number 1171354

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YEAR ENDED 31 MARCH 2023

Charity Registration No: 1171354

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Year ended 31 March 2023



Trustees' Annual Report for the period

	Period start date				Period end date		
From	Day 01	Month 04	Year 2022	To	Day 31	Month 03	Year 2023

Section A Reference and administration details

Charity name

Age Concern Crosby

Other names charity is known by

Registered charity number (if any)

1171354

Charity's principal address

7 Bell Yard

London

Postcode	WC2A 2JR
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Names of the charity trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Jonathan Upton	Chair	Appointed 26 May 2022	
Susan Scholes		Appointed 26 May 2022	
Meryl Davies		Resigned 26 May 2022	

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Section B Structure, governance, and management

AGE CONCERN CROSBY

Year ended 31 March 2023

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Charitable Rules adopted January 2017
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Trustees are appointed by the board of Re-engage Ltd

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees.
- the charity's organisational structure and any wider network with which the charity works.
- relationship with any related parties.
- trustees' consideration of major risks and the system and procedures to manage them.

Section C Objectives and activities

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

To promote the relief of elderly people in any manner which now or hereafter may be deemed by law to be charitable in and around the Sefton area in particular by the provision and operation of lunch clubs, activities, holidays, and outings for older persons.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The trustees confirm that in reviewing and making decisions regarding our activities, we have regard to the Charity Commission's general guidance on public benefit.

AGE CONCERN CROSBY

Year ended 31 March 2023

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grant making.
- policy programme related investment.
- contribution made by volunteers.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The donation made to Re-engage Ltd has enabled Re-engage to continue providing core services in and around the Sefton area providing older people with opportunities to make new friendships and regain their social confidence.

Section E

Financial review

Brief statement of the charity's policy on reserves

As the charity has no expenditure commitments (e.g. no employees, property, other running costs) and its only expenditure going forward will be grants made from net assets held, the trustees see no need to hold reserves.

Details of any funds materially in deficit

N/A

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising).
- how expenditure has supported the key objectives of the charity.
- investment policy and objectives including any ethical investment policy adopted.

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	Jonathan Upton	Susan Scholes
Full name(s)	Jonathan Upton	Susan Scholes
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	30 January 2024	

AGE CONCERN CROSBY

Year ended 31 March 2023

INCOME AND EXPENDITURE ACCOUNT

	Unrestricted Funds £	Endowment Funds £	Total 2023 £	Total 2022 £
INCOME				
Donations and legacies				
Donations	0	0	0	4,800
Charitable activities				
Trusts	0	0	0	1,833
Fundraising income				
Fundraising	0	0	0	148
Bank and investment income				
Bank interest	0	0	0	9
Other income	18	0	18	0
Total income	18	0	18	6,790
EXPENDITURE				
Charitable activities				
Donations (transfer of cash & assets to Re-engage)	0	0	0	0
Charitable activities	0	0	0	6,237
Support costs				
Management and administration	0	0	0	12,435
Total expenditure	0	0	0	(18,672)
NET INCOME / (EXPENDITURE)	18	0	18	(13,151)
FUNDS BFWD ON 1 APRIL 2022	54	0	54	146,191
FUNDS CFWD AT 31 MARCH 2023	72	0	72	133,040

AGE CONCERN CROSBY

Year ended 31 March 2023

BALANCE SHEET

	2023		2022	
	£	£	£	£
NET CURRENT ASSETS				
Tangible assets		0		0
CURRENT ASSETS	0		225	
Debtors				
Cash at bank and in hand	72		54	
	<u>72</u>		<u>279</u>	
CREDITORS: Amounts falling due within one year	<u>(72)</u>		<u>(279)</u>	
NET CURRENT ASSETS		0		0
NET ASSETS		0		0
FUNDS				
Unrestricted funds		0	0	0
Restricted funds		0	0	0
TOTAL FUNDS		0	0	0

It is anticipated that a transfer of Age Concern's net assets to Re-engage Ltd will take place at the end of each financial year.

For the year ended 31 March 2023 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies.

No members have required the company to obtain an audit of its accounts for the year ended 31 March 2023 in accordance with section 476 of the Companies Act 2006.

The trustees acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

These financial statements were approved by the trustees on 30 January 2024 and signed on their behalf by:

Jonathan Upton

Jonathan Upton
Trustee

Susan Scholes

Susan Scholes
Trustee

Re-engage Crosby

England & Wales - Charity number 1171354

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AGE CONCERN CROSBY

ANNUAL ACCOUNTS

YEAR ENDED 31 MARCH 2022

Charity Registration No: 1171354

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Year ended 31 March 2022



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day	Month	Year		Day	Month	Year
	01	04	2021		31	03	2022

Section A Reference and administration details

Charity name	Age Concern Crosby
Other names charity is known by	
Registered charity number (if any)	1171354
Charity's principal address	7 Bell Yard London Postcode WC2A 2JR

Names of the charity trustees who manage the charity

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Susan Bramley		Resigned 26 May 2022	
Christine Chua-Short		Resigned 26 May 2022	
Jane Daly		Resigned 26 May 2022	
Gillian Boggan		Resigned 26 May 2022	
Sharon Ryan		Resigned 26 May 2022	
Tracey McGeagh		Resigned 26 May 2022	
Jonathan Upton	Chair	Appointed 26 May 2022	
Susan Scholes		Appointed 26 May 2022	
Meryl Davies		Appointed 26 May 2022	

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
N/A	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance, and management

AGE CONCERN CROSBY

Year ended 31 March 2022

Description of the charity's trusts

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Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

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AGE CONCERN CROSBY

Year ended 31 March 2022

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grant making.
- policy programme related investment.
- contribution made by volunteers.

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Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The donation made to Re-engage Ltd has enabled Re-engage to continue providing their core services across the UK, providing older people with opportunities to make new friendships and regain their social confidence.

Section E

Financial review

Brief statement of the charity's policy on reserves

As the charity has no expenditure commitments (e.g. no employees, property, other running costs) and its only expenditure going forward will be grants made from net assets held, the trustees see no need to hold reserves.

Details of any funds materially in deficit

N/A

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising).
- how expenditure has supported the key objectives of the charity.
- investment policy and objectives including any ethical investment policy adopted.

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Section F Other optional information

--

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Jonathan Upton	Meryl Grace Davies
Position (eg Secretary, Chair, etc)	Trustee	Trustee
Date	20 December 2022	

AGE CONCERN CROSBY

Year ended 31 March 2022

INCOME AND EXPENDITURE ACCOUNT

	Unrestricted Funds £	Endowment Funds £	Total 2022 £	Total 2021 £
INCOME				
Donations and legacies				
Donations	4,800	0	4,800	5,470
Charitable activities				
Trusts	1,833	0	1,833	0
Fundraising income				
Fundraising	148	0	148	0
Bank and investment income				
Bank interest	9		9	51
Total income	6,790	0	6,790	5,521
EXPENDITURE				
Charitable activities				
Donations (transfer of cash & assets to Re-engage)	103,937	0	103,937	0
Charitable activities	5,721	0	5,721	6,237
Support costs				
Management and administration	30,118	0	30,118	12,435
Total expenditure	(139,776)	(0)	(139,776)	(18,672)
NET INCOME / (EXPENDITURE)	(132,986)	0	(132,986)	(13,151)
FUNDS BFWD ON 1 APRIL 2021	133,040	0	133,040	146,191
FUNDS CFWD AT 31 MARCH 2022	54	0	54	133,040

AGE CONCERN CROSBY

Year ended 31 March 2022

BALANCE SHEET

	2022		2021	
	£	£	£	£
NET CURRENT ASSETS				
Tangible assets		0		7,057
CURRENT ASSETS	225		3,284	
Debtors				
Cash at bank and in hand	54		123,846	
	279		127,130	
CREDITORS: Amounts falling due within one year	(279)		(1,147)	
NET CURRENT ASSETS		0		125,983
NET ASSETS		0		133,040
FUNDS				
Unrestricted funds		0	0	99,989
Restricted funds		0	0	33,051
TOTAL FUNDS		0	0	133,040

It is anticipated that a transfer of Age Concern's net assets to Re-engage Ltd will take place at the end of each financial year.

For the year ended 31 March 2022 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies.

No members have required the company to obtain an audit of its accounts for the year ended 31 March 2022 in accordance with section 476 of the Companies Act 2006.

The trustees acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

These financial statements were approved by the trustees on 20 December 2022 and signed on their behalf by:



Jonathan Upton
Trustee



Meryl Davies
Trustee

Re-engage Crosby

England & Wales - Charity number 1171354

Accounts



Registered Charitable Incorporated Organisation: 1171354

Annual Report and
Financial Statements
Period ended 31 March 2021

Age Concern Crosby Year Ended 31 March 2021

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Age Concern Crosby Year Ended 31 March 2021

Message from the Chair

We are pleased to present to you our Annual Report for Age Concern Crosby for the year ended 31 March 2021. Whilst the financial year ended very much with a glimmer of positive news regarding the start of reopening of the UK following Covid-19 lockdowns it did come after more than a year of our services being severely restricted or curtailed and you will see this reflected in our results.

In January 2020 we had celebrated our move to our new lunch club venue at the Waterloo United Free Church. Sadly, only a short time later, we were required to close our clubs due to the lockdown, but we hope to be able to resume activities now later in 2021. When we restart, we will be following expert guidance on sanitising and social distancing to ensure that we limit the chance of further spread of Covid-19; we know that our many service-users have dearly missed our lunch clubs and outings during this very difficult time, worsening social isolation and loneliness, and as soon as we are confident to re-open, we will do this.

As you will see from reading our accounts, we continue to have costs that exceed our income, however, our financial resources remain relatively healthy. Despite the pandemic effects we have continued to pursue grant and other funding opportunities to benefit older people in our area although we anticipate that the funding environment will become even more challenging with many organisations seeking the limited funding available to help cope with the after-effects of Covid.

In my report last year, I told you that the trustees have recognised that with the effect of the recent pandemic we need to consider what services we are able to safely provide. We undertook to investigate whether there are like-organisations with whom we could work to widen our appeal to the communities we were set-up to support, ensure our services and information is accessible and clear and to find new activities that older people would be interested in. This need to seek external support came to the fore during the past year as we struggled to recruit the new trustees and volunteers that we require, coupled with the planned retirement of a number of existing trustees and volunteers. To this end, the trustees sent out an invitation to several local and national charities whose purpose and ethos appeared to align with that of Age Concern Crosby, seeking from them their thoughts on how we may work together to continue our excellent work. Following a number of submissions, Zoom calls and discussions the trustees have selected a national charity 'Re-engage' (previously known as Contact the Elderly) with which we are in negotiation towards a merger with the aim of securing a future for the services we provide. Re-engage exists to provide social connections for older people at a time in their lives when their social circles are diminishing. Its vision is... "a world where no-one is ever too old to make friends and enjoy social interaction" and its mission..."to work within communities to end social isolation and loneliness in older people".

This has not been an easy decision to make, after almost 70 years of operating independently, but the trustees believe it is necessary to ensure that we can continue to support our service-users, whilst benefitting from the great work that our volunteers do and ensuring that our governance remains robust for The Charity Commission.

Age Concern Crosby Year Ended 31 March 2021

We are currently going through a number of priorities with Re-engage colleagues but we are aiming to ensure in the proposed merger that, insofar as is possible activities continue and Age Concern Crosby's funds are used within our operating area, just as we would had we been able to continue unchanged.

The various lockdowns have made us completely re-focus on our services and what older people within the area needed. This led us during 2020/21 to ensure that we maintained strong communications between service-users, volunteers and in particular Chris Dale our Administrator who worked hard to ensure no older person was left isolated. We have arranged shopping, keeping-in-touch calls, Christmas hampers and extensive information and advice. I am so grateful to all the volunteers, trustees and Chris for their continued support and commitment throughout the very difficult past 18 months; you are all amazing and we couldn't do this without you.

Su Bramley, Chair

Age Concern Crosby Year Ended 31 March 2021

Trustees' Report

Report to the members of:

Age Concern Crosby

Other names the charity is known by

Crosby Old People's Welfare
Committee

Registered charity number:

1171354

Charity's principal address:

c/o Susan Bramley, Chair
31 Park Way
Meols, Wirral CH47 7BS

Structure, governance and management:

Description of Age Concern Crosby's Trusts

Name of Trustee	Office (if any)	Dates acted (if not for the whole year)
Susan Bramley	Chair	
Louella Lyon	Deputy Chair	Resigned 31 July 2020
Christina Chua-Short	Secretary	
Jane Daly		
Gillian Boggan	Treasurer	
Sharon Ryan		
Tracey McGeagh		Appointed 3 November 2020
There are no other Trustees		

Type of governing document

Charitable Rules adopted January 2017

How the Charity is constituted

Charitable Incorporated Organisation January 2017

Trustee selection methods

General advertisement, stakeholder search, meetings with Trustees against agreed criteria

Summary objects of Age Concern Crosby

To promote and assist the general good of all old people in the borough of Crosby by assisting the work of statutory authorities and voluntary organisations engaged in providing facilities for physical and mental recreation, developing physical improvement, furthering health, relieving poverty, distress or sickness, or in pursuing any objects which not are or hereafter may be deemed by law to be charitable.

Summary of the main activities in relation to these objects

The charity provides lunch clubs, activities, holidays and outings for the elderly and housebound. During the COVID-19 pandemic, these activities were not permitted due to government restrictions to control the virus.

Age Concern Crosby Year Ended 31 March 2021

How Age Concern Crosby is administered in order to achieve these objects

During the COVID-19 pandemic, the charity has continued to support service users by ensuring regular telephone contact through the administrator, volunteers and trustees. The charity also provided Christmas hampers, and ensured service users received birthday cards and gifts to recognise significant birthdays. Information and advice services continued throughout the 'lockdown' period.

Once it is safe to do so, and observing government guidance, the charity will resume activities including:

- The provision of weekly social meetings with lunch or refreshments and group activities,
- The provision of services through the use of the minibus owned and operated by Age Concern Crosby for the benefit of older people.

These services will be delivered with the support of the charity's volunteers, trustees and employee.

Achievements and performance:

Summary of the main achievements of Age Concern Crosby

Maintaining weekly contact with service users by telephone throughout the 'lockdown' period. Provision of Christmas hampers, birthday cards and gifts, information and advice.

Financial Review: Brief Statement on Age Concern Crosby's Policy on reserves

Income is credited to a restricted reserve where the donor requests this. Related costs are then applied to the restricted reserve. In 2017, a restricted reserve was created to manage a specific legacy. Reserves of the previous Age Concern Crosby have been transferred to the newly incorporated Age Concern Crosby.

Details of any funds materially in deficit

Not applicable

Principal sources of funds

This information is detailed in the Income and Expenditure Account on Page 9.

Declaration:

The Trustees declare that they have approved the Trustees' report above

Signatures



Full name
Date

Christina Chua-Short
22 October 2021

Susan Bramley
22 October 2021

Age Concern Crosby Year Ended 31 March 2021

Independent Examiner's Report on the Accounts

Report to the members of: Age Concern Crosby

Registered charity number: 1171354

On accounts for the year ended: 31 March 2021 as set out on pages 8 to 17.

Respective responsibilities of trustees and examiner

The Charity's Trustees are responsible for the preparation of the accounts. They consider that an audit is not required for this year under Section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed. It is my responsibility to examine the accounts under Section 145 of the Charities Act; to follow the procedures laid down under the General Directions given by the Charity Commissioners (under section 145(5)(b) of the Charities 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 Direction given by the Charity Commissioners. An examination includes a review of the accounting records kept by the Charity and a comparison of the financial statements. 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 I do not express an opinion on the view given by the accounts.

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 aspect the requirements
 - a. To keep accounting records in accordance with section 130 of the Charities Act; and
 - b. To prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Charities 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

Signed



Date 22 October 2021
Examiner Paul Jameson
Professional Qualification Chartered Public Finance Accountant

Age Concern Crosby Year Ended 31 March 2021

Balance Sheet

	Note	Unrestricted Funds £	Restricted Funds £	Total 31 Mar 21 £	Total 31 Mar 20 £
Fixed Assets					
Tangible assets	7	7,057	0	7,057	9,410
Total fixed assets		7,057	0	7,057	9,410
Current assets					
Debtors and Prepayments	8	3,284	0	3,284	4,363
Short term investments and deposits	5				
Cash at bank and in hand		90,795	33,051	123,846	132,888
Total current assets		94,079	33,051	127,130	137,251
Current liabilities					
Creditors falling due within one year	9	(1,147)	0	(1,147)	(470)
Net current assets		92,932	33,051	125,983	136,781
Total assets less current liabilities		99,989	33,051	133,040	146,191
Long term liabilities					
Creditors falling due after more than one year		0	0	0	0
Provisions for liabilities		0	0	0	0
Net assets		99,989	33,051	133,040	146,191
Funds of the charity					
Restricted income funds	4		33,051	33,051	33,051
Unrestricted income funds		99,989		99,989	113,140
Total funds of the charity		99,989	33,051	133,040	146,191

Signed on behalf of all the Trustees



Christina Chua-Short, Secretary



Susan Bramley, Chair

Date: 22 October 2021

Age Concern Crosby

Year Ended 31 March 2021

Statement of Financial Activities (SOFA)

	Unrestricted Funds £	Restricted Funds £	2020/21 Total £	2019/20 Total £
Incoming Resources				
Incoming resources from donors	5,470	0	5,470	7,102
Legacies	0	0	0	0
Investment income	51	0	51	262
Income from charitable activities	0	0	0	14,686
Fundraising	0	0	0	476
Total incoming resources	5,521	0	5,521	22,526
Expenditure				
Direct charitable expenditure	6,237	0	6,237	25,615
Fund-raising and publicity	0	0	0	0
Charitable trading	0	0	0	0
Management and administration	12,435	0	12,435	12,034
Total expenditure	(18,672)	0	(18,672)	37,649
Net income/(expenditure) before transfers	(13,151)	0	(13,151)	(15,123)
Transfer between funds		0		0
Net (outgoing)/incoming resources	(13,151)	0	(13,151)	(15,123)
Unrealised gains on fixed assets	0	0	0	0
Net movement in funds	(13,151)	0	(13,151)	(15,123)
Fund balances brought forward	113,140	33,051	146,191	161,314
Fund balances carried forward	99,989	33,051	133,040	146,191

Age Concern Crosby Year Ended 31 March 2021

Notes to the accounts

1. Accounting policies and financial year end

Basis of accounting

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

The accounts have been prepared in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP (FRS 102), the Financial Reporting Standard applicable in the UK and Ireland (FRS 102) and with the Charities Act 2011.

The charity constitutes a public benefit entity as defined by FRS 102.

Going Concern

The Trustees consider the charity is a going concern.

Change in basis

There has been no change to the valuation rules and methods of accounting since the previous year

2. Trustees

The amount of any remuneration or other benefits paid to Age Concern Crosby Trustees, or any person connected with them, from the charity:

Name of Trustee	Amounts paid /value of benefit	
	2020/21	2019/20
	£	£
Susan Bramley	0	0
Jane Daly	0	0
Christina Chua-Short	0	0
Louella Lyon	0	0
Ann McCracken	n/a	0
Gillian Boggan	0	0
Sharon Ryan	0	n/a
Tracey McGeagh		

Age Concern Crosby

Year Ended 31 March 2021

3. Expenditure

Details of amount paid for independent examiner's remuneration:

Mr Paul Jameson, Chartered Public Finance Accountant, provided his independent examination services free of charge.

Grants to institutions

Age Concern Crosby did not make any grants to other institutions during the year (2019/20: nil).

4. Endowment and restricted funds

Age Concern Crosby does not have any endowment funds.

Details of the restricted funds held by the charity are given below:

Restricted Fund	Purpose	2020/21	2019/20
		£	£
Legacy Cath McAdam	This fund is to be used for holidays and outings	910	910
Jean Kerrigan	This fund is to be used for holidays and outings	30,851	30,851
Groundworks	Funds to be used for holidays, outings and club activities	1,290	1,290
Total restricted funds		33,051	33,051

5. Investment assets

Age Concern Crosby does not hold any investment assets (2019/20: nil).

6. Paid employees

	2020/21	2019/20
Average number of employees in the year	1	1
Total emoluments of employee*	£8,852	£7,979

*Total emoluments in 2020/21 includes back-dated pay award

Age Concern Crosby

Year Ended 31 March 2021

7. Tangible fixed assets

Age Concern Crosby owns two tangible fixed assets, a Mercedes Benz minibus purchased in February 2016 and a computer purchased in June 2016. During the year both assets have been depreciated at 25% per annum on a reducing balance basis.

	Vehicles, Plant and Machinery £	Total £
Asset cost or valuation		
Balance brought forward at 1 April 2020	52,379	52,379
Additions and revaluation		
Disposals		
Balance carried forward at 31 March 2021	52,379	52,379
Accumulated depreciation		
Balance brought forward at 1 April 2020	(42,969)	(42,969)
Disposals and revaluation		
Charge for the year	(2,353)	(2,353)
Balance carried forward at 31 March 2021	(45,322)	(45,332)
Net book value at 1 April 2020	9,410	9,410
Net book value at 1 April 2021	7,057	7,057

8. Debtors and prepayments

	Unrestricted £	Restricted £	2020/21 £	2019/20 £
Other debtors	2,125		2,125	3,375
Prepayments	1,159		1,159	988
Total debtors and prepayments	3,284		3,284	4,363

All debtors and prepayments fall due within one year.

9. Creditors and accruals

	2020/21 £	2019/20 £
Loans and overdrafts	0	0
Trade creditors	120	341
Other creditors	1,027	129
Total creditors and accruals	1,147	470

The charity has no long-term creditors.

Age Concern Crosby

Year Ended 31 March 2021

10. Other disclosures

	2020/21 £	2019/20 £
Does the charity have any commitments not provided for in the accounts?	No	No
Has the charity given any guarantees?	No	No
Has the charity received a loan secured on any of its assets?	No	No
At the year end, did the charity have any contingent liabilities?	No	No
Did the charity receive grants as a material part of its income?	Yes	Yes
Details:		

- a) Age Concern Crosby received a grant from Metropolitan Borough of Sefton of £3,900 (2019/20: £3,900) in respect of its provision of lunch clubs for the elderly and housebound
- b) Tesco awarded a Groundwork grant of £500 of which £500 was recognised in 2020/21 (2019/20: £1,000)
- c) Liverpool One (Savills) awarded a grant of £1,000.

11. Declarations

Adequacy of assets to meet fund restrictions	Sufficient resources are held in an appropriate form to enable funds to be applied in accordance with the restrictions imposed
Change in year end	The Trustees have not changed the year end date nor length of the charity's financial year
Designated funds	Age Concern Crosby has three restricted funds as detailed in Note 4 above
Ex-gratia payments	Age Concern Crosby did not make ex-gratia payments during the year
Inter-fund loans	There were no inter-fund loans outstanding at the year end
Large investments	Age Concern Crosby does not hold any investments
Quoted investments	Age Concern Crosby does not hold any quoted investments
Revaluations	No revaluations took place in 2020/21

Age Concern Crosby

Year Ended 31 March 2021

Summary income and expenditure account

For the information of members and supporters, Age Concern Crosby has prepared additional income and expenditure accounts, which provide greater detail than that required by the Charity Commission. This information can be found on pages 15 to 16

Trustee Investments Act

The requirements of the Trustee Investments Act 1961 have been complied with

Uncapitalised fixed assets

Age Concern Crosby has no material uncapitalised fixed assets

12. Accounting Policies

Cash donations and gifts

These are included in the Statement of Financial Activities when:

- The charity is told it is to receive the gift or donation
- Trustees are reasonably certain of the amount to be received
- Trustees are reasonably certain they will receive the money and any conditions for receipt are met

Cash from fundraising

This is reported gross in the Statement of Financial Activities

Cash from lunch club activities

These are included in the accounts as income from charitable activities. In previous years the income and expenditure from lunch club activities has been recorded on a net basis. The previous year analysis has been restated in notes 14 and 15 and the prior year comparators on the Statement of Financial Activities and Balance Sheet.

Gifts in kind for sale or distribution

These are included in the accounts as gifts only when sold or distributed.

Gifts in kind for use by the charity

These are included in the Statement of Financial Activities as incoming resources when receivable.

Intangible Income

This is only included in incoming resources (with an equivalent amount in expenditure) if the charity would have had to purchase the resources and the amount is material

Age Concern Crosby

Year Ended 31 March 2021

12. Accounting Policies (continued)

Legacies	These are included as soon as it is reasonably certain they will be received
Tax reclaims and gifts and covenants	These would be included in the Statement of Financial Activities at the same time as the gift to which they related
Valuation of gifts in kind	Gifts in kind would be accounted for at a reasonable estimate of their value to the charity or the amount realised
Voluntary help	The value of voluntary help is not included in the accounts but is described in the Trustees' annual report
Donated assets	These would be capitalised at a reasonable value on receipt and depreciated
Investment property valuation	This would be valued at a Trustees' estimate of market value
Quoted stocks and shares	These would be valued at market value
Tangible fixed assets for use by the charity	These are capitalised if they can be used for more than one year and cost at least £250. They are valued at cost or a reasonable value on receipt and depreciated in full in the year of acquisition.
Investment income	This and any associated tax credits are included in the accounts when due.

13. Additional Matters

In January 2017, Age Concern Crosby changed its constitution to become a Charitable Incorporated Organisation (CIO) and the assets and liabilities of the previously registered charity Age Concern Crosby were transferred in their entirety on that date.

Age Concern Crosby Year Ended 31 March 2021

14. Income:

	2020/21 £	2019/20 £
Legacies	0	0
Grants and income from donors		
Metropolitan Borough of Sefton grant	3,900	3,900
Tesco Groundworks grant	500	1,000
Liverpool One (Savills)	1,000	
Sefton CVS	0	700
General donations and in Memorium	70	802
Rotary Club	0	700
Santander bank donation	0	0
Soroptimist International Crosby	0	0
	5,470	7,102
Interest Received		
Building Society and Bank Interest	51	262
Fundraising activities		
Christmas fair, Strawberry tea, cakes etc.	0	476
	0	476
Charitable activities		
Lunch club income	0	9,208
Holiday income	0	3,231
Flicks and Friends income	0	2,247
	0	14,686
Income for the year	£5,521	£22,526

Age Concern Crosby

Year Ended 31 March 2021

15. Expenditure:

	2020/21	2019/20
	£	£
Administrative and management		
Telephone	459	512
Administrative salary	8,852	7,979
Travel expenses	151	518
Bank charges	36	0
Printing, postage and stationery	71	275
Training	0	300
Payroll processing	120	120
Computer depreciation	54	71
Insurance, general and trustee	344	749
Lottery fees, CRB and sundries	20	104
Website	2,328	1,406
	12,435	12,034
Fundraising and publicity	0	0
Club Activities		
Volunteer thank you	60	810
Lunch clubs	20	7,807
Christmas expenditure	2,204	875
Greeting cards	288	0
Volunteers' expenses	0	52
Flicks and Friends	0	2,153
Holidays and outings (net)	0	6,941
Rents	0	1,400
	2,572	20,038
Vehicle Costs		
Maintenance, drivers, garaging, fuel	304	1,505
Depreciation for the year on minibus	2,299	3,066
Insurance	1,062	1,006
	3,665	5,577
Expenditure for the year	£18,672	£37,649