

OLDER CITIZENS ADVOCACY YORK

England & Wales - Charity number 1173795

Details

Other names OCA Y

Status Registered

Legal form CIO

Registered 2017-07-12

Register [View on the Charity Commission register](#)

Contact

Address Older Citizens Advocacy York
Priory Street Centre
15 Priory Street
York
YO1 6ET

Phone 01904676200

Email info@ocay.org.uk

Website <http://www.oldercitizensadvocacyyork.org.uk/>

Activities

Objects: THE OBJECTS OF THE CIO ARE:THE OBJECTIVE OF OLDER CITIZENS ADVOCACY YORK (OCA Y) IS TO PROVIDERELIEF TO OLDER PEOPLE IN NEED IN THE CITY OF YORK AND ITS SURROUNDINGAREA BY THE PROVISION OF A GENERAL ADVOCACY SERVICE.NOTHING IN THIS CONSTITUTION SHALL AUTHORISE AN APPLICATION OF THE PROPERTY OF THE CIO FOR THEPURPOSES WHICH ARE NOT CHARITABLE IN ACCORDANCE WITH [SECTION 7 OF THE CHARITIES AND TRUSTEEINVESTMENT (SCOTLAND) ACT 2005] AND [SECTION 2 OF THE CHARITIES ACT (NORTHERN IRELAND) 2008]

Activities: OCA Y provides a free, confidential and independent advocacy service to older people in the City of York and its surrounding area in order to provide relief to older people in need.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** Disability, The Prevention Or Relief Of Poverty, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** Elderly/old People, Other Defined Groups

Geography

- City Of York

Finances

Period end	Income	Expenditure	Assets	Employees
2025-09-30	£108,027	£124,122	-	-
2024-09-30	£85,304	£126,829	-	-
2023-09-30	£123,112	£93,483	-	-
2022-09-30	£109,286	£133,358	-	-
2021-03-31	£123,641	£84,742	-	-

Trustees

Name	Role	Appointed
Gillian Caldicott	Chair	2020-01-15
Alison Louise Regan		2024-03-19
Helen Tulloch		2026-02-17
Laura Ann Walker		2023-01-17
Matthew William Knight		2021-11-10
SYLVIA DOUGHTY		2017-07-12
Tracey Elaine Dennison		2021-11-10

OLDER CITIZENS ADVOCACY YORK

England & Wales - Charity number 1173795

Accounts

Older Citizens Advocacy York (OCA Y)

**Receipts and Payments Accounts
for the year ended
30 September 2025**

Registered Charity No. 1173795

Older Citizens Advocacy York (OCA Y)

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Older Citizens Advocacy York (OCAY)

REFERENCE AND ADMINISTRATIVE DETAILS OF THE CHARITY, ITS TRUSTEES AND ADVISERS FOR THE YEAR ENDED 30th SEPTEMBER 2025

Trustees	Gillian Caldicott (Chair) Tracey Dennison Sylvia Doughty (Secretary) Matthew Knight (Vice-chair) Michael Leighton Alison Rogan Laura Walker (Treasurer)
Charity registration number	1173795
Registered Office	Older Citizens Advocacy York Priory Street Centre 15 Priory Street YORK YO1 6ET
Bankers	CAF Bank
Independent Examiner Of Accounts	James Grainger, ACA
Patron Honorary Vice President	Professor Dianne Willcocks Douglas M Craig, OBE

Older Citizens Advocacy York (OCAY)

Chair's Report

I am pleased to report another successful year for OCAY, during which we have supported more clients than ever before while strengthening our foundations for the future.

Our Impact

In 2024-25, we supported 531 clients across the York area, a 6.6% increase from the previous year. The majority of our work focused on benefits and blue badge applications, helping people over 50 access the financial support and independence they deserve. We also assisted clients with family disputes, financial and banking problems, and lasting powers of attorney applications. Each case represents a person who gained greater security, dignity, and peace of mind through our service.

Financial Sustainability

This financial year was the final year of our 4 year grant from the National Lottery Community Fund. We are grateful to the National Lottery Community Fund for their support over the last 4 years – which supported us to emerge from the pandemic stronger, more resilient and able to support our clients during an unprecedented cost of living crisis. However, the financial landscape for charities is becoming increasingly challenging and much effort was invested this year in diversifying our funding sources and assessing our financial position to set us up for the future. We are grateful to the City of York Council in particular for their ongoing support. In December 2025, we were delighted to receive confirmation that we have been successful in our application for another 3 year grant from the National Lottery Community Fund. This provides crucial stability for our work and enables our ambitions to have even more impact. City of York Council and the Two Ridings Community Foundation have also provided vital financial support. We extend our sincere thanks to all our funders who make it possible for us to continue our essential service.

Our People

The backbone of OCAY remains our dedicated volunteers. Our 13 active volunteers, along with 4 more currently in advocacy training, enable us to support the growing number of clients who need our help. Their commitment and expertise are invaluable, and we are enormously grateful for their continued service. Recruiting new volunteers remains both important and challenging, and we will continue to focus on this in the year ahead. Our staff team has worked tirelessly to keep the charity running smoothly and deliver excellent service to our clients. The Board have had to make some difficult decisions this year around future staff structures and we are grateful to the current and previous staff teams for their professionalism and dedication.

A significant development this year has been the impact of our Charity Director, Amy Faulkner-Gadd, who has built strong strategic partnerships with organisations across York. These relationships ensure we can provide mutual and complementary support, and we will continue to develop both existing and new partnerships throughout 2026.

The Board of Trustees has remained largely stable. Michael Leighton has stepped down from the Board. We thank him for his contribution and are pleased he continues as a volunteer. We are currently recruiting a new volunteer representative to the Board, and in 2026 we will be looking to expand the Board further. I extend my thanks to all current trustees for their ongoing guidance and support.

Looking Ahead

The third sector landscape continues to evolve, presenting both challenges and opportunities. OCAY has responded by adapting how we operate while maintaining the quality of service our clients expect and deserve. As we look to 2025-26, our priorities will be to consolidate our partnerships, strengthen our volunteer base, and continue growing our capacity to support the over-50s community in York.

OCAY continues to go from strength to strength, and I am confident that the foundations we have built will enable us to meet whatever challenges and opportunities the coming year brings.

Gillian Caldicott

Gillian Caldicott, Chair

17th February 2026

Older Citizens Advocacy York (OCAY)

Trustees' Annual Report

The Trustees of Older Citizens Advocacy York (OCAY) are pleased to present this annual report together with the accounts of the Charity for the year ended 30 September 2025.

The financial statements comply with the Charities Act 2011.

The Trustees have paid due regard to the requirements to act for the public benefit and are fully satisfied that the activities of the Charity meet all of the Charity Commission's guidance on public benefit in exercising their powers or duties.

Charity objectives and activities

The charitable objects of OCAY are:

- To provide relief to older people in need in the City of York and its surrounding area by the provision of a general advocacy service.

OCAY was founded in 2001 by a group of older people. They became involved in a pilot run by 'Better Government for Older People', intended to orchestrate better services and communities that worked for older people. We emerged to meet these needs, ensure inclusion, and get older people's voices heard. We have continued to evolve over the years, with funding from the National Lottery Community Fund supported by smaller grants from City of York Council wards and grant making organisations alongside our own fundraising. We have offered an independent, free and confidential advocacy service to those over the age of 50 in the City of York area for 23 years and continue to successfully advocate for those in need.

Achievements and Performance

Support for client needs

The need for OCAY and the support we give is growing. In 2020/21 we supported clients on 290 cases and this has risen over subsequent years - this year, we supported clients on a total of 531 cases over the financial year.

- 94 cases (last year 89 cases) were signposted to another organisation (such as Age UK, City of York Council or Citizens Advice York)
- 423 cases were supported and closed in the year (303 last year)
- 14 enquiries were dealt with immediately and required no further action.

In addition, 30 cases were open and ongoing at the end of the year.

We support clients with a diverse range of issues. Our most common issue this year has been benefits (54%), including information, form-filling and assessments. We've also helped with health and care issues (24%), housing (8%), consumer complaints (8%), as well as other issues – including helping people find out what is going on in their communities.

Clients come to OCAY in a variety of ways - many are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience of support from us.

Volunteer Support

We remain committed to being a volunteer-led service. We currently have 13 active volunteers and we are currently onboarding an additional 4 volunteers. As part of the next phase of our charity we are actively recruiting more. We continue to advertise for volunteers on the OCAY website, social media and local community newsletters, such as Local Link and Handy Mag.

We continue to invest in our volunteer training to ensure all new volunteers receive the information and gain the skills that they need in their roles. We have also provided additional training sessions on specific areas of advocacy to develop the skills of our volunteers. Alongside this six monthly supervision sessions enable us to ensure that the volunteers are supported and can input into the development and direction of the charity.

Older Citizens Advocacy York (OCAY)

Quality Standards, Monitoring & Evaluation

We carried out a longer-term impact survey in August 2025 to understand the long-term impact of working with OCAY. We want to continue developing our knowledge and understanding of the longer-term impact of our work on clients, to help us to improve our service delivery and find out what other factors could be impacting on older people's feelings of wellbeing.

68% of people surveyed reported that OCAY's help had led to an improvement in their wellbeing. This score was much lower than previous years (95% in 2024). While anecdotally we believe this is likely the result of the situation people currently find themselves in, with a higher cost of living and lower living standards, we will be monitoring this indicator closely. Despite this 80% of clients surveyed stated that OCAY's support provided an emotional and practical benefit. We have also monitored the financial gain that clients have received as a result of accessing various benefits because of the support OCAY has provided. A total amount of over £70,000 in additional support for those over 50 in York in need.

We conduct a "pre and post case" questionnaire with clients and the questions cover feelings of control, being taken seriously, having your voice heard and the impact the advocacy issue is/was having on well-being. The responses were mainly favourable. Participants appreciated the service and were extremely grateful for the support OCAY had provided.

100% of people stated that they had an improved sense of control and that they had been taken more seriously after our support. 95% of people reported being more confident to remain living independently.

Financial Review

In 2023/24 we conducted a strategic review to ensure we were set up to succeed in the challenging context for charities. As part of this review, we appointed a new Charity Director to support our ambitions to grow the charity and support the increasing needs of York residents.

We continue to be grateful to the National Lottery Community Fund for the provision of our main source of funding. This year was the final year of our four year funding cycle and our funding from the National Lottery Community Fund tapered throughout the funding period. Securing additional funding was incredibly challenging in the current financial year, as we continued to feel the pressure experienced by many in the charity sector and the squeeze on available grant funds. In 2024/25, we conducted a financial resilience and funding strategy review. As part of this, we made the very difficult decision to restructure the operational advocacy team and, as such, our Lead Advocate left the organisation in summer 2025. We are incredibly grateful to the Lead Advocate for his efforts during his tenure with us.

The main costs for the charity are the salaries of our key staff members and the cost of our premises. Staff costs have increased in the year because this is the first full year of the Charity Director post and there is also the cost of redundancy. We continue to see cost inflation across our key expenditure lines and it is noted that the reduction in premises costs relates to invoice timing not an underlying reduction.

Our current cycle of lottery funding ended in September 2025. A huge amount of effort was invested in Autumn 2025 to find other sources of funds, including applying for a new 3 year grant from the National Lottery Community Fund. We were incredibly grateful to receive the news in December 2025 that we have been successful in our application for £198,858 over 3 years from the National Lottery Community Fund. Alongside support from York City Council and the York Community Fund, delivered in collaboration with MySight, we are in a strong financial position. **At the end of the year, we hold £53,072 in reserves, of which £19,166 is restricted and £18,000 is designated as a contingency for unforeseen costs.** Our overall reserves represents around 6 months running costs, which is in line with our reserves targets. Given the level of uncertainty at the end of the financial period – when we had concluded the previous lottery grant but not yet been offered funding for a new project, the board felt a prudent level of reserves was appropriate.

Structure, Governance and Management

Older Citizens Advocacy is a Charitable Incorporated Organisation (CIO) formed on 12th July 2017 (succeeding an unincorporated charity Older Citizens Advocacy York, charity number 1094279) and governed by a constitution.

Trustees

Older Citizens Advocacy York (OCAY)

The charity has a minimum of 3 and a maximum of 12 Trustees; every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

The Chair and Vice-Chair are responsible for assessing the need for new Trustees and overseeing the recruitment of new trustees. Two new Trustees, including a Volunteer Advocate Trustee, were appointed in the year and a process is ongoing to recruit more Trustees in the new financial year.

Operational Management

The charity is led by a Charity Director, who is responsible for the day to day running of the charity and execution of the board agreed upon strategy. The Charity Director is supported by a Paid Advocate and a Finance and Administration Coordinator, as well as our committed group of volunteers. All of our staff members work part-time and deliver a huge amount. We are incredibly grateful for the ongoing support, dedication and adaptability of the staff team.

Trustees meet on a bi-monthly basis with the Charity Director to review operational and financial performance, as well as progress against charity strategy. Alongside this, the Chair meets with the Charity Director and all staff on a monthly basis to review operational performance and key issues.

Older Citizens Advocacy York (OCAY)

Independent Examiner's Report to the Trustees of Older Citizens Advocacy York

I report to the trustees on my examination of the accounts of Older Citizens Advocacy York (the Charity) for the period ended 30 September 2025.

Responsibilities and basis of report

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Use of this report

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

James Grainger

James Grainger
Independent Examiner

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Older Citizens Advocacy York (OCA Y)

Summary of Receipts and Payments for the year ended 30 September 2025

	Note	Unrestricted funds £ £	Designated funds £	Restricted funds £	1 Oct 2024 to 30 Sept 2025 Total £	1 Oct 2023 to 30 Sept 2024 Total £
Receipts						
Grant funding	2	0	0	104,036	104,036	79,926
Fundraising	3	905	0	0	905	853
Donations (inc Gift Aid)	4	1,791	0	0	1,791	2,339
Bank interest		1,295	0	0	1,295	2,186
Total receipts		3,991	0	104,036	108,027	85,304
Payments						
Staff costs		36,755	0	65,307	102,062	87,550
Staff training		0	0	0	0	661
Staff recruitment and expenses		0	0	60	60	9,495
Volunteer costs		0	0	215	215	1,032
Investors in Volunteers accreditation		0	0	10	10	2,160
Property costs		0	0	12,261	12,261	11,773
Telecommunications and IT		0	0	5,943	5,943	7,587
Office supplies		0	0	1,152	1,152	2,637
Insurance		0	0	1,302	1,302	1,237
Publicity, Events, Outreach & Fundraising		0	0	439	439	2,226
Other expenses		0	0	678	678	471
Total payments		36,755	0	87,367	124,122	126,829
Cash funds b/fwd at 1 Oct		48,670	18,000	2,498	69,168	110,694
Net receipts/(payments) in the period		(32,764)	0	16,669	(16,096)	(41,526)
Funds transfers		0	0	0	0	0
Cash funds c/fwd at 30 September 2024		15,906	18,000	19,166	53,072	69,168

Older Citizens Advocacy York (OCA Y)

Statement of Assets & Liabilities at 30 September 2025

	Total	Total
	30 September 2025	30 September 2024
	Notes £	£
Cash funds		
Deposit account	42,273	66,311
Current account	10,736	2,803
Petty cash	64	54
Total cash funds at period end	53,073	69,168
Represented by funds carried forward		
<u>Unrestricted funds:</u>		
General funds	15,906	48,671
Designated funds	5 18,000	18,000
<u>Restricted funds:</u>		
Household Support Fund	2,083	0
Two Ridings Community Fund	833	(0)
Charles Hayward Trust	3,750	492
PureyCust Trust Grant	12,500	667
Total funds at period end	53,072	69,168

Other Monetary Assets

The Charity does not have any other Monetary Assets.

Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

The accounts were approved and authorised for issue by the Trustees on 17th February 2026 and signed on their behalf by:

Gillian Caldicott

Sylvia Doughty

Gillian Caldicott
Chair of Trustees

Sylvia Doughty
Trustee & Secretary

Older Citizens Advocacy York (OCAY)

Notes to the Receipts and Payments Accounts for the year ended 30 September 2025

1. These accounts have been prepared under the historical cost convention, on a receipts and payments basis, in accordance with Section 133 of the Charities Act 2011 and following the guidance for accounting for smaller charities issued by the Charity Commission.

2. Grant funding

	year ending 30 September 2025	year ending 30 September 2024
	£	£
Unrestricted funds		
Grants less than £3,000	0	200
	<u>0</u>	<u>200</u>
Restricted funds		
National Lottery Community Fund	47,839	52,188
Ways to wellbeing	0	5,900
Allen Lane Foundation Grant	0	4,438
Household Support Fund	25,000	4,000
Two Ridings Community Fund	5,000	4,748
Charles Hayward Trust	5,000	3,000
PureyCust Trust Grant	15,000	5,452
York City Council Financial Inclusion Steering Group	4,693	0
York Common Good Trust	500	0
York City Council - Acomb Outreach	1,004	0
	<u>104,036</u>	<u>79,726</u>

National Lottery Community Fund

The National Lottery Community Fund have provided grant funding to contribute to the delivery of the advocacy services delivered by OCAY along with the general management and running of the charity. This current element of funding was secured in 2021 for the period from October 2021 to September 2025 and income tapered over the 4 year term. The final payment for this grant was received in the financial period reported here. The Trustees are grateful for the support of the National Lottery Community Fund over the last 4 years.

OCAY are grateful for the support of other grant funders included above, as well as York City Council.

In December 2025, it was confirmed that OCAY had been successful in applying for a further 3 years of funding from the National Lottery Community Fund for a new project commencing January 2026. The charity appreciates the ongoing support of the National Lottery Community Fund – as well as other funders supporting us on an ongoing basis, such as York City Council and York Community Fund.

3. Fundraising

During the year, we conducted several community fundraising events at Fulford Show and West Bank Fair.

4. Donations

Donations (including Gift Aid) totalling £1,791 (2024 - £2,339) were received during the year. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who donated to the charity.

Older Citizens Advocacy York (OCA Y)

Notes to the Receipts and Payments Accounts for the year ended 30 September 2025 (continued)

5. Designated funds

At the year end, the following designated fund was held by the charity:

	year ending 30 Sept 2025	year ending 30 Sept 2024
	£	£
Contingency fund	18,000	18,000
Total designated funds	18,000	18,000

Contingency fund

The Trustees have agreed to hold £18,000 (2024 - £18,000) in designated funds against contingencies such as staff redundancies, early office lease termination or any other unforeseen emergencies.

OLDER CITIZENS ADVOCACY YORK

England & Wales - Charity number 1173795

Accounts

Older Citizens Advocacy York (OCAY)

**Receipts and Payments Accounts
for the year ended
30 September 2024**

Registered Charity No. 1173795

Older Citizens Advocacy York (OCA Y)

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Older Citizens Advocacy York (OCAY)

REFERENCE AND ADMINISTRATIVE DETAILS OF THE CHARITY, ITS TRUSTEES AND ADVISERS FOR THE YEAR ENDED 30th SEPTEMBER 2024

Trustees Gillian Caldicott (Chair)
Tracey Dennison
Sylvia Doughty (Secretary)
Matthew Knight (Vice-chair)
Michael Leighton - appointed May 24
Jean Reed – resigned September 24
Alison Rogan – appointed March 24
Laura Walker (Treasurer)

Charity registration number 1173795

Registered Office Older Citizens Advocacy York
Priory Street Centre
15 Priory Street
YORK
YO1 6ET

Bankers CAF Bank

Independent Examiner Of Accounts James Grainger, ACA

Patron Professor Dianne Willcocks
Honorary Vice President Douglas M Craig, OBE

Older Citizens Advocacy York (OCAY)

Chair's Report

When I joined the OCAY Board in 2020 my fellow trustees were excited about the fact that we had supported clients on over 300 cases in the year, for the first time. In 2023/24 we have supported clients on 498 cases, a massive increase in a relatively short space of time.

The cost-of-living crisis, complicated bureaucracy of applying for benefits and digital exclusion all impact on older people and the 6.4% increase in our case numbers reflect the value of OCAY services to our service users. Typically, services users come to OCAY to help them apply for benefits and blue badge applications. Often, they just need some help and support to navigate their way through a problem with bureaucracy or a question about an entitlement. We also get some more unusual requests: helping grandparents reestablish contact with estranged grandchildren, offering support at a tribunal or accompanying someone to a police interview. We couldn't do any of this without the fantastic work of our volunteers and staff.

We currently have 22 volunteers and welcomed 7 new volunteers this year – a warm welcome to those who have joined us. Inevitably, some volunteers leave us each year – we thank them for their service. As always, we said goodbye to some student volunteers who supported us whilst at university -notably Olivia Siwoka and Sophie Lloyd who both won Student Volunteering and Community Awards for their work with us.

The OCAY staff team have, as always been brilliant. In late 2023, we expanded the team by appointing a new post of Paid Advocate and providing additional advocacy services and support, working alongside our experienced Advocacy Manager. This appointment has been very successful and our client service continues to improve.

During the year, the Trustees reflected on the increasing need and complexity of our charity. We are a small but ambitious charity, and the Board made a decision to restructure the leadership of the charity and appoint a Charity Director. This role will provide a strategic vision to lead us through the next stage of our development. Paul Storey was appointed to the for the period from August 2024 to January 2025 and made a significant impact in a short period of time. His permanent replacement, Amy Faulkner-Gadd will join us in the post of Charity Director in March. As part of these changes, Abi Willis left the Charity during the year. She played a vital role in navigating us through recent challenges and we are grateful for her efforts.

The Board of Trustees has, largely, remained the same as last year. We are a diverse group, in terms of skills and experience, yet are all working together to make sure we steer OCAY successfully through this new and exciting stage of our development. Unfortunately, this year Jean Reed – our long-established Trustee Volunteer Representative had to step back, due to ill health. I'd like to thank Jean for all the everything she has given OCAY as both volunteer and trustee. We now welcome Michael Leighton to the board – having volunteered for us for 8 years, his experience of what OCAY means to service users and volunteers is invaluable. Ali Rogan also joined the Board, and her external experience has served us well as she leads our ongoing strategic review. My thanks to all trustees and a warm welcome to those appointed in the year.

My final thanks are to Matthew Knight, our outgoing Chair. He has done a fantastic job steering the charity over recent years. I am pleased that Matthew has agreed to remain on the board as a Trustee and thank him for his support as I transition into my new role as Chair.

An important part of OCAY's success are the organisations who fund us. The Big Lottery Community Fund is our largest funder, and we are grateful for their continued support. There are also many smaller funders who support the outreach and other work we do to make sure people in and around York know we are here to support them. The financial outlook for our service users remains very challenging and in 2024/25 we will be redoubling our efforts, in partnership with York City Council, Age UK, Citizens Advice and York Older Persons Assembly, to ensure that citizens of York, aged 50+, are socially included and free from poverty. We are already collaborating with them, and local leaders such as MP Rachael Maskell, to promote applications for pension credit, which will unlock other benefits such as the winter fuel allowance, attendance allowance and blue badge applications. We will also continue to work with our clients to support them with the challenges that come their way.

I'm looking forward to a new year of supporting the OCAY team to help more people feel listened to, to navigate complex bureaucracy and to feel we have made a positive impact on their lives.

Gillian Caldicott

Gillian Caldicott, Chair

18th February 2025

Older Citizens Advocacy York (OCAY)

Trustees' Annual Report

The Trustees of York Older Citizens Advocacy York (OCAY) are pleased to present this annual report together with the financial statements of the Charity for the year ended 30 September 2024.

The financial statements comply with the Charities Act 2011.

The Trustees have paid due regard to the requirements to act for the public benefit and are fully satisfied that the activities of the Charity meet all of the Charity Commission's guidance on public benefit in exercising their powers or duties.

Charity objectives and activities

The charitable objects of OCAY are:

- To provide relief to older people in need in the City of York and its surrounding area by the provision of a general advocacy service.

OCAY was founded in 2001 by a group of older people. They became involved in a pilot run by 'Better Government for Older People', intended to orchestrate better services and communities that worked for older people. We emerged to meet these needs, ensure inclusion, and get older people's voices heard. We have continued to evolve over the years, with funding from the National Lottery Community Fund supported by smaller grants from City of York Council wards and grant making organisations alongside our own fundraising. We have offered an independent, free and confidential advocacy service to those over the age of 50 in the City of York area for 23 years and continue to successfully advocate for those in need.

Achievements and Performance

Support for client needs

The need for OCAY and the support we give is growing. In 2020/21 we supported clients on 290 cases and this has risen over subsequent years - this year, we supported clients on 498 cases (468 last year).

Of the 498 cases we worked in on 2023/24:

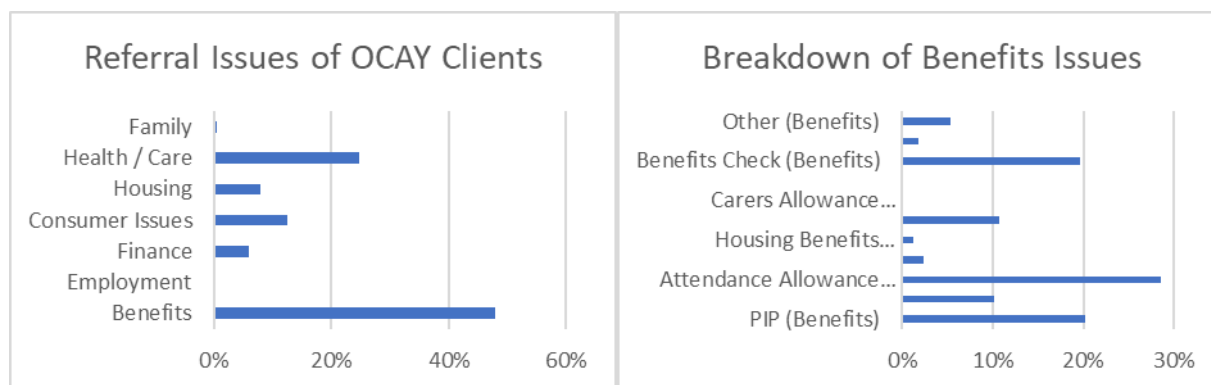
- 89 cases (last year 137 cases) were signposted to another supporting organisation (such as Age UK, Christians Against Poverty and York Mind)
- 76 cases (last year 56 cases) were ongoing at the end of the year
- we closed 303 cases in the year (270 last year).

We support clients with a diverse range of issues. Our most common issue this year has been benefits (48%), including information, form-filling and assessments. We've also helped with consumer complaints (13%), family (1%), housing (8%) and health issues (25%) and we have helped people find out what is going on in their communities.

We continue to see a large number of people looking for support with Blue Badge applications with 56 this year, only slightly down from last year.

Clients come to OCAY in a variety of ways - many are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us.

Older Citizens Advocacy York (OCAY)



Volunteer Support

We remain committed to being a volunteer-led service. We currently have 20 active volunteers and are looking to recruit more. We continue to advertise for volunteers on the OCAY website, social media and local community newsletters, such as Local Link and Handy Mag. Our volunteer recruitment has gained us 7 new volunteers which has helped us to manage the natural turnover of volunteer numbers.

We have run information sessions every 2 to 3 months with speakers from the GP social prescribing service, York Carers Centre and a local law practice. Two of our student volunteers have won awards at the University of York for their work as advocates with OCAY.

We continue to invest in our Volunteer Training Programme to ensure all new volunteers receive the information and gain the skills that they need in the role. We have introduced a new session in the induction training to look closely at recording notes, helping to ensure consistency and quality. The team are now reviewing the remaining training, updating it to encourage best practice.

We are increasing volunteers' knowledge of services available to clients during the cost of living crisis and beyond. Services and provision of services are ever changing, and this is being addressed as and when it occurs. Our Advocacy Manager produces a newsletter every 2 weeks for the volunteers to keep them apprised of what is happening within OCAY as well as important updates of our partner organisations and information changes to subjects such as benefits.

Quality Standards, Monitoring & Evaluation

We carried out a longer-term impact survey in March/April 2024 to understand the long-term impact of working with OCAY. We want to increase our knowledge and understanding of the longer-term impact of our work on clients, to help us to improve our service delivery and find out what other factors could be impacting on older people's feelings of wellbeing.

We conduct a "pre and post case" questionnaire with clients and the questions cover feelings of control, being taken seriously, having your voice heard and the impact the advocacy issue is/was having on well-being. The responses were mainly favourable, participants appreciated the service and were extremely grateful for the support OCAY had provided. This is demonstrated by 100% "yes" on the question: *if you had a problem in the future would you go back to OCAY for help?* 100% of people felt that OCAY's support had positively impacted their well-being, with 80% rating the impact at the highest level. 100% also stated that working with us had improved their confidence, with 75% putting this in the highest level. 75% felt there had been long-term financial benefit (up 7% on the year before), 89% felt long-term emotional benefit (up 11%) and 94% felt long-term practical benefit (up 28%).

Financial Review

We ended 2023 in a very healthy financial position and during the year the Trustees have spent time discussing the future of our organisation and how we can best service the ever increasing need of our clients. As such, we made a decision to invest some of our opening reserves in our staffing to set OCAY up for the future. In December 2023, we welcomed a new paid advocate to the team. She has brought a wealth of experience to support clients and improve our volunteer support. We also made a decision to realign team responsibilities and to appoint a Charity Director, to support our ambitions to grow the charity and support the increasing needs of York residents. In August 2024, we were pleased to welcome Paul Storey to the team in that role. He has already had a huge impact.

Older Citizens Advocacy York (OCAY)

We continue to be grateful to the National Lottery Community Fund for the provision of our main source of funding. This year was the third of a four year funding cycle and our funding from the National Lottery Community Fund tapers throughout the funding period. Securing additional funding has been challenging this year, as we feel the pressure experienced by many in the charity sector and the squeeze on available grant funds. A key focus for Paul and the board will be building our financial resilience and funding strategy. Despite this, due to concerted effort and energy, we have broadly maintained our level non-lottery grant funding year on year.

The main costs for the charity are the salaries of our key staff members and the cost of our premises. Underlying and ongoing costs have increased in the year due to decisions to invest in our service in order to better support our clients. We increased our office footprint to create space for new staff and a larger, better suited meeting room and invested in staff as noted above. We have also been impacted over recent years by inflationary increases across all costs.

Due to the uncertainty in funding beyond 2025 (when the funding from the current National Lottery Community Fund grant ends), we continue to explore further sources of ongoing funding. At the end of the year, we hold £68,677 in reserves – representing just over 6 months forecast running costs, which is broadly in line with our reserves target.

Structure, Governance and Management

Older Citizens Advocacy is a Charitable Incorporated Organisation (CIO) formed on 12th July 2017 (succeeding an unincorporated charity Older Citizens Advocacy York, charity number 1094279) and governed by a constitution.

Trustees

The charity has a minimum of 3 and a maximum of 12 Trustees; every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

The Chair and Vice-Chair are responsible for assessing the need for new Trustees and overseeing the recruitment of new trustees. Two new Trustees, including a Volunteer Advocate Trustee, were appointed in the year and a process is ongoing to recruit more Trustees in the new financial year.

Operational Management

During 2024, a decision was made to implement a new management structure. Since 2022, we had been running with 2 managers – accountable for Operations and Advocacy respectively. As the demands on the charity and the need for our services increases, the trustees made a decision in the year to remove the post of Operations Manager and appoint a Charity Director to lead the charity into the future.

The Trustees are very grateful to the **Operations Manager, Abi Willis** who left in May 2023 with our best wishes and gratitude. Following an organisational restructure, the charity is now run by a **Charity Director**, supported by an **Advocacy Manager, Administrative Assistant** and **Paid Advocate**.

Trustees meet on a bi-monthly basis with the Charity Director to review operational and financial performance, as well as progress against charity strategy. Alongside this, the Chair meets with the Charity Director and all staff on a monthly basis to review operational performance and key issues.

Older Citizens Advocacy York (OCAY)

Independent Examiner's Report to the Trustees of Older Citizens Advocacy York

I report to the trustees on my examination of the accounts of Older Citizens Advocacy York (the Charity) for the period ended 30 September 2024.

Responsibilities and basis of report

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Use of this report

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

James Grainger

James Grainger
Independent Examiner

27th February 2025

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Older Citizens Advocacy York (OCAY)

Summary of Receipts and Payments for the year ended 30 September 2024

	Note	Unrestricted funds £	Designated funds £	Restricted funds £	1 Oct 2023 to 30 Sept 2024 Total £	1 Oct 2022 to 30 Sept 2023 Total £
Receipts						
Grant funding	2	200	0	79,726	79,926	92,600
Fundraising	3	853	0	0	853	2,051
Donations (inc Gift Aid)	4	2,339	0	0	2,339	27,590
Bank interest		2,186	0	0	2,186	871
Total receipts		5,578	0	79,726	85,304	123,112
Payments						
Staff costs		33,460	0	54,089	87,550	69,299
Staff training		0	0	661	661	70
Staff recruitment and expenses		0	0	9,495	9,495	192
Volunteer costs		0	0	1,032	1,032	328
Investors in Volunteers accreditation		0	0	2,160	2,160	0
Property costs		0	0	11,773	11,773	11,798
Telecommunications and IT		0	0	7,587	7,587	6,649
Office supplies		0	0	2,637	2,637	1,734
Insurance		0	0	1,237	1,237	1,010
Publicity, Events, Outreach & Fundraising		0	0	2,226	2,226	1,803
Other expenses		0	0	471	471	601
Total payments		33,460	0	93,369	126,829	93,483
Cash funds b/fwd at 1 Oct 2023		76,554	18,000	16,140	110,694	81,065
Net receipts/(payments) in the period		(27,883)	0	(13,643)	(41,526)	29,630
Funds transfers		0	0	0	0	0
Cash funds c/fwd at 30 September 2024		48,671	18,000	2,497	69,168	110,695

Older Citizens Advocacy York (OCAY)

Statement of Assets and Liabilities at 30 September 2024

	Total	Total
	30 September 2024	30 September 2023
	Notes £	£
Cash funds		
Deposit account	66,311	86,645
Current account	2,803	24,010
Petty cash	54	39
Total cash funds at period end	69,168	110,695
Represented by funds carried forward		
<u>Unrestricted funds:</u>		
General funds	48,671	76,553
Designated funds	5 18,000	18,000
<u>Restricted funds:</u>		
National Lottery Community Fund	0	12,000
Common Good Trust	0	500
Liz & Terry Bramall Foundation	0	417
The Brelms Trust CIO	0	458
York City Council Outreach	(0)	833
Two Ridings Community Fund 2023	0	1,000
Asda Foundation	(0)	932
Ways to wellbeing	492	0
Allen Lane Foundation Grant	667	0
Aviva Community Fund Nov 23	840	0
Hillards Charitable Trust	500	0
Total funds at period end	69,168	110,695

Other Monetary Assets

The Charity does not have any other Monetary Assets.

Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

The accounts were approved and authorised for issue by the Trustees on 23rd February 2025 and signed on their behalf by:

Gillian Caldicott

Gillian Caldicott
Chair of Trustees

Sylvia Doughty

Sylvia Doughty
Trustee & Secretary

Older Citizens Advocacy York (OCAY)

Notes to the Receipts and Payments Accounts for the year ended 30 September 2024

1. These accounts have been prepared under the historical cost convention, on a receipts and payments basis, in accordance with Section 133 of the Charities Act 2011 and following the guidance for accounting for smaller charities issued by the Charity Commission.

2. Grant funding

	year ending 30 September 2024	year ending 30 September 2023
	£	£
Unrestricted funds		
Grants less than £3,000	200	0
	<hr/> 200	<hr/> 0
Restricted funds		
National Lottery Community Fund	52,188	69,584
Ways to wellbeing	5,900	-
CYC FISG 2023/24 grant	4,438	-
Liz & Terry Bramall Foundation	-	5,000
The Brelms Trust CIO	-	5,500
Allen Lane Foundation Grant	4,000	-
Aviva Community Fund Nov 23	4,748	-
CYC FISG 2024/25	3,000	-
Grants less than £3,000	5,452	12,516
	<hr/> 79,726	<hr/> 92,600

National Lottery Community Fund

The National Lottery Community Fund have provided grant funding to contribute to the delivery of the advocacy services delivered by OCAY along with the general management and running of the charity. This current element of funding was secured in 2021 for the period from October 2021 to September 2025 and income tapers over the 4 year term. In order to mitigate for the reducing National Lottery funding, grant funding has been identified and secured from other sources.

3. Fundraising

During the year, we conducted several community fundraising events at St Crux, Fulford Show and West Bank Fair.

4. Donations

Donations (including Gift Aid) totalling £2,339 (2023 - £27,590) were received during the year. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who donated to the charity. In the prior year, a significant donation was gratefully received from Aviva Community Fund, which was not replicated in the current year.

Older Citizens Advocacy York (OCA Y)

Notes to the Receipts and Payments Accounts for the year ended 30 September 2024 (continued)

5. Designated funds

At the year end, the following designated fund was held by the charity:

	year ending 30 Sept 2024	year ending 30 Sept 2023
	£	£
Contingency fund	18,000	18,000
Total designated funds	18,000	18,000

Contingency fund

The Trustees have agreed to hold £18,000 (2023 - £18,000) in designated funds against contingencies such as staff redundancies, early office lease termination or any other unforeseen emergencies.

OLDER CITIZENS ADVOCACY YORK

England & Wales - Charity number 1173795

Accounts

Older Citizens Advocacy York (OCA Y)

**Receipts and Payments Accounts
for the year ended
30 September 2023**

Registered Charity No. 1173795

Older Citizens Advocacy York (OCA Y)

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Older Citizens Advocacy York (OCAY)

REFERENCE AND ADMINISTRATIVE DETAILS OF THE CHARITY, ITS TRUSTEES AND ADVISERS FOR THE YEAR ENDED 30th SEPTEMBER 2023

Trustees	Sharon Beattie – resigned Sept 23 Gillian Caldicott (Vice-Chair) Tracey Dennison Sylvia Doughty (Secretary) James Grainger (Treasurer and Associate Trustee) – resigned Jul 23 Matthew Knight (Chair) Chelsea Martin – resigned Sept 23 Jean Reed – appointed Jan 23 Laura Walker (Treasurer) - appointed Jan 23
Charity registration number	1173795
Registered Office	Older Citizens Advocacy York Priory Street Centre 15 Priory Street YORK YO1 6ET
Bankers	CAF Bank
Independent Examiner Of Accounts	Helen Faraday, FCA
Patron Honorary Vice President	Professor Dianne Willcocks Douglas M Craig, OBE

Older Citizens Advocacy York (OCAY)

Chair's Report

The last 12 months have seen some significant increases in OCAY's workload, as well as some big changes in our staffing and organisation. We are a developing and ambitious charity - small, but determined to do more to help those older people in the City who need our help.

In the year 2022-23 we dealt with 468 cases - an increase of 50% on pre pandemic levels. Demand shows no signs of decreasing and we have to be constantly on the look out for new ways to make sure we can continue to meet it. We've particularly seen an increase this year in the numbers of benefits related cases coming to us.

It's important to say that we have coped with the additional numbers thanks to the tremendous commitment of both our staff and our volunteer advocates. My particular thanks go to those who have taken on additional cases in recent months and/or have committed to doing so during the winter. And a warm welcome to the new advocates who have joined us during the year. The biggest challenge we face is recruiting new volunteers, to replace those who inevitably leave us from time to time and to enable us to respond to those who need our help. We are always looking for new advocates, so please do point any possible new recruits towards our Advocacy Manager, Dan Brittan.

Our new staffing structure saw Abi Willis appointed as Operations Manager, with Dan as Advocacy Manager. We also welcomed Danni Gordon as our Administrator, and Danni has proved to be an excellent addition to the team. In addition, I'm very pleased that the Trustees have recently agreed to appoint a new and additional part time paid advocate, and that person will support Dan and strengthen the ways we can support our volunteers. We are determined to remain a volunteer led service but we have to balance what our volunteers can do with the right level of staff support and its great we have been able to take this important step.

Abi has had a very successful year in leading our fundraising efforts and its partly because of this that we are confident enough to add to the staffing team. We remain incredibly indebted to The National Lottery for their support, but we know we cannot be complacent. In this context we were particularly grateful to receive important financial support this year from the Aviva Community Fund.

Abi and Danni have put a lot of effort this year into increasing the quality and quantity of our outreach work as we try to publicise OCAY more effectively and to make sure that those who need us know about us. We have done more organised outreach in the last 12 months than at any other time in OCAY's history.

We lost James Grainger, Chelsea Martin and Sharon Beattie as Trustees during the year and I want to put on record my thanks to all three for the vital parts they have played in guiding OCAY in recent years. They will both be much missed. We were delighted to welcome Laura Walker to the Board to succeed James as our Treasurer. Laura brings a great deal of financial expertise from her work as a Finance Director at Asda, as well as experience as a charity Trustee. We also welcomed back Jean Reed to the Board – it's really important we have serving advocates as Trustees and Jean's experience is very helpful to keeping our discussions informed and grounded. I'm very grateful to Gillian Caldicott - OCAY's excellent Vice Chair - and to all our Trustees for their continuing hard work and enthusiasm. We are currently recruiting for new Trustees to strengthen the Board further.

OCAY says farewell this year to one of our most experienced and committed advocates as Sir Alistair Graham steps down. His contribution has been immense (and irreplaceable!) and we are delighted he has agreed to be our guest speaker at this year's AGM, sharing his thoughts and perspectives on OCAY's work and how he evaluates the work that we do.

Finally, I want to acknowledge the excellent support and co-operation we continue to receive from colleague organisations in the City. The York Older Peoples Assembly (YOPA) and Age UK York are particularly important partners, but we operate very positively in collaboration with many other organisations too. My thanks to all our friends and supporters for everything they continue to do to help our work.

Matthew Knight

Matthew Knight, Chair

Date: 28/11/23

Older Citizens Advocacy York (OCAY)

Trustees' Annual Report

The Trustees of York Older Citizens Advocacy York (OCAY) are pleased to present this annual report together with the financial statements of the Charity for the year ended 30 September 2023.

The financial statements comply with the Charities Act 2011.

The Trustees have paid due regard to the requirements to act for the public benefit and are fully satisfied that the activities of the Charity meet all of the Charity Commission's guidance on public benefit in exercising their powers or duties.

Charity objectives and activities

The charitable objects of OCAY are:

- To provide relief to older people in need in the City of York and its surrounding area by the provision of a general advocacy service.

OCAY was founded in 2001 by a group of older people. They became involved in a pilot run by 'Better Government for Older People', intended to orchestrate better services and communities that worked for older people. We emerged to meet these needs, ensure inclusion, and get older people's voices heard. We have continued to evolve over the years, with funding from the National Lottery Community Fund supported by smaller grants from City of York Council wards and grant making organisations alongside our own fundraising. We have offered an independent, free and confidential advocacy service to those over the age of 50 in the City of York area for 22 years and continue to successfully advocate for those in need.

Achievements and Performance

Support for client needs

The need for OCAY and the support we give is growing. In 2020/21 we supported clients on 290 cases; in the year to September 2022, this number had risen to 463 and this year, we supported clients on 468 cases – which is similar year on year – which shows demand for our services has risen significantly since the pandemic.

Of the 468 cases we worked in on 2022/23:

- 89 cases (last year 137 cases) were signposted to another supporting organisation (such as Age UK, Christians Against Poverty and York Mind)
- 76 cases (last year 56 cases) were ongoing at the end of the year
- we closed 303 cases in the year (270 last year).

We've spent 1390 hours (1271 last year) directly advocating for clients on these 303 cases - an average of 4.6 hours of support for each client (4.7 last year).

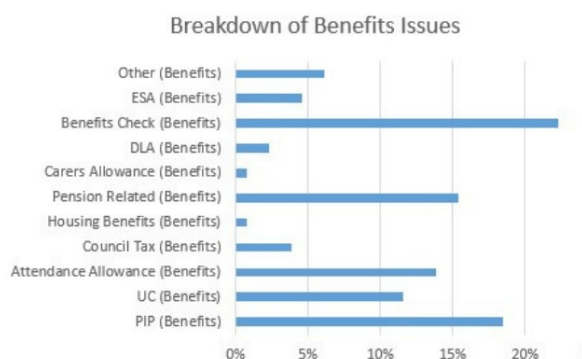
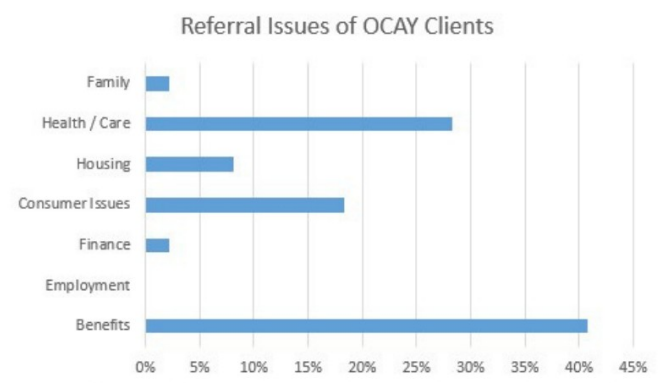
Many of our clients have underlying health conditions, mental health issues or are often very frail and elderly. This year 89% of our clients stated they were disabled (physically, mentally or intellectually), 47% lived alone and 16% cared for someone else.

We support clients with a diverse range of issues. Our most common issue this year has been benefits, including information, form-filling and assessments. We've also helped with consumer complaints, family, housing and employment issues and we have helped people find out what is going on in their communities.

We've seen an increase in people looking for support around Blue Badge applications in the past year from 4 in 2020/21 to 65 this year.

Clients come to OCAY in a variety of ways - many are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us.

Older Citizens Advocacy York (OCAY)



Volunteer Support

We remain committed to being a volunteer-led service. We currently have 21 active volunteers and have recruited new volunteers in the year and are looking to recruit more. We continue to advertise for volunteers on the OCAY website, social media and local community newsletters, such as Local Link and Handy Mag.

Towards the end of the year, we ramped up our volunteer recruitment efforts and have since held new volunteer training sessions for 5 new recruits. We have advertised for volunteers on the OCAY website, social media and local community newsletters, such as Local Link and Handy Mag.

This year, we have launched a volunteer mentoring programme for newer volunteers and have held a new “Coffee & Chat” every other month for our volunteers so they can share ideas and experiences. We also held an information session with one of the GP Social Prescribers in York to discuss how they work in relation to OCAY with their cases and referrals.

We continue to invest in our Volunteer Training Programme to ensure all new volunteers receive the information and gain the skills that they need in the role. We are increasing volunteers’ knowledge of services available to clients during the cost of living crisis and beyond. Services and provision of services are ever changing and this is being addressed as and when it occurs. Our Advocacy Manager produces a newsletter every 2 weeks for the volunteers to keep them apprised of what is happening within OCAY as well as important updates of our partner organisations and information changes to subjects such as benefits.

Quality Standards, Monitoring & Evaluation

We carried out a longer-term impact survey in June/July 2023 to understand the long-term impact of working with OCAY. We want to increase our knowledge and understanding of the longer-term impact of our work on clients, to help us to improve our service delivery and find out what other factors could be impacting on older people’s feelings of wellbeing.

We conduct a “pre and post case” questionnaire with clients and the questions cover feelings of control, being taken seriously, having your voice heard and the impact the advocacy issue is/was having on well-being. The responses were mainly favourable, participants appreciated the service and were extremely grateful for the support OCAY had provided. This is demonstrated by 100% “yes” on the question: *if you had a problem in the future would you go back to OCAY for help?* Most people felt that OCAY’s support had positively impacted their well-being over the past 6 months. 85% of people gave scores of 8 out of 10 or more.

Financial Review

After a very successful year of fundraising, the charity is in a strong financial position, despite cost increases in the year.

The main costs for the charity are the salaries of our key staff members and the cost of our premises. Both costs have increased in the year due to inflationary pressures, but we have worked hard to control other costs and manage our resources carefully.

We continue to be grateful to the National Lottery Community Fund for the provision of our main source of funding. This year was the second of a four year funding cycle and our funding from the National Lottery Community Fund tapers throughout the funding period. To build financial resilience, significant effort has been put into identifying and securing alternative sources of funding. This year we were pleased and grateful to be awarded over £25,000 from the Aviva Community Fund.

Older Citizens Advocacy York (OCAY)

Due to the uncertainty in funding beyond 2025 (when the funding from the current National Lottery Community Fund grant ends), we continue to explore further sources of ongoing funding and are holding an increased level of reserves to support our ongoing work. At the end of the year, the charity held £111,000 in reserves.

Trustees continually review forecast sources of funds and the financial outlook of the charity. Due to good financial management, an improving outlook on sources of alternative funding and the level of reserves forecast at year end, the Trustees approved investment into a paid advocate role which was recruited at the end of the financial year. Investment into this role will reduce the level of reserves in 2023.

Structure, Governance and Management

Older Citizens Advocacy is a Charitable Incorporated Organisation (CIO) formed on 12th July 2017 (succeeding an unincorporated charity Older Citizens Advocacy York, charity number 1094279) and governed by a constitution.

Trustees

The charity has a minimum of 3 and a maximum of 12 Trustees; every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

The Chair and Vice-Chair are responsible for assessing the need for new Trustees and overseeing the recruitment of new trustees. Two new Trustees were appointed in the year and a process is ongoing to recruit more Trustees in the new financial year.

Operational Management

During 2023, a management restructure was implemented. Day to day, the charity is run by the **Operations Manager, Abi Willis** and the **Advocacy Manager, Dan Brittan**. They are supported by **Admin Assistant, Danni Gordon** who joined the team this year and has been an excellent addition. The Trustees meet with Dan and Abi on a bi-monthly basis to review operational and financial performance, as well as progress against charity strategy.

Older Citizens Advocacy York (OCAY)

Independent Examiner's Report to the Trustees of Older Citizens Advocacy York

I report to the trustees on my examination of the accounts of Older Citizens Advocacy York (the Charity) for the period ended 30 September 2023.

Responsibilities and basis of report

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Use of this report

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

Helen Faraday

Helen Faraday
Independent Examiner
27th November 2023

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Older Citizens Advocacy York (OCAY)

Summary of Receipts and Payments for the year ended 30 September 2023

	Notes	Unrestricted funds £ £	Designated funds £	Restricted funds	1 Oct 2022 to 30 Sept 2023 Total £	1 Apr 2021 to 30 Sept 2022 Total £
Receipts						
Grant funding	2	0	0	92,600	92,600	104,196
Fundraising	3	2,051	0	0	2,051	758
Donations (inc Gift Aid)	4	27,590	0	0	27,590	4,208
Other income					0	46
Bank interest		871	0	0	871	78
Total receipts		30,512	0	92,600	123,112	109,286
Payments						
Staff costs		0	0	69,299	69,299	99,336
Staff training		0	0	70	70	179
Staff recruitment and expenses		0	0	192	192	1,668
Volunteer training		0	0	0	0	850
Investors in Volunteers accreditation					0	2,249
Volunteer expenses		0	0	328	328	354
Property costs		0	0	11,798	11,798	13,071
Telecommunications and IT		0	0	6,649	6,649	9,211
Office supplies		0	0	1,734	1,734	1,992
Insurance		0	0	1,010	1,010	981
Fundraising expenses		102	0	389	491	499
Outreach publicity and events		0	0	284	284	942
General publicity and advertising		0	0	1,028	1,028	1,572
AGM expenses		0	0	222	222	257
Subscriptions		0	0	318	318	42
Bank charges		0	0	61	61	155
Total payments		102	0	93,381	93,483	133,358
Cash funds b/fwd at 1 Oct 2022		46,143	18,000	16,922	81,065	105,137
Net receipts/(payments) in the period		30,410	0	(781)	29,629	(24,072)
Funds transfers		0	0	0	0	0
Cash funds c/fwd at 30 September 2023		76,553	18,000	16,141	110,694	81,065

Older Citizens Advocacy York (OCAY)

Statement of Assets and Liabilities at 30 September 2023

	Total 30 September 2023	Total 30 September 2022
Notes	£	£
Cash funds		
Deposit account	86,645	27,950
Current account	24,010	53,004
Petty cash	38	111
Total cash funds at period end	110,694	81,065
Represented by funds carried forward		
<u>Unrestricted funds:</u>		
General funds	76,553	46,143
Designated funds	5 18,000	18,000
<u>Restricted funds:</u>		
National Lottery Community Fund	12,000	6,940
Financial Inclusion – Benefits programme	0	(261)
Tesco Bags for Help	0	506
Age UK Outreach	0	841
NHS APP	0	1,091
Two Ridings Community Foundation – Belfry fund	0	1,645
York Common Good Trust	500	738
Aviva - Dementia	0	750
Independent Age	0	4,672
The Liz and Terry Bramall Foundation	417	0
The Brelms Trust CIO	458	0
Two Ridings Community Fund 2023	1,000	0
Asda Grant	932	0
York City Council Outreach	833	0
Total funds at period end	110,695	81,065

Other Monetary Assets

The Charity does not have any other Monetary Assets.

Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

The accounts were approved and authorised for issue by the Trustees on **28th Nov 2023** and signed on their behalf by:

Matthew Knight

Matthew Knight
Chair of Trustees

Sylvia Doughty

Sylvia Doughty
Trustee

Older Citizens Advocacy York (OCA Y)

Notes to the Receipts and Payments Accounts for the 12 month period ended 30 September 2023

1. These accounts have been prepared under the historical cost convention, on a receipts and payments basis, in accordance with Section 133 of the Charities Act 2011 and following the guidance for accounting for smaller charities issued by the Charity Commission.

2. **Grant funding**

	12 month period ending 30 September 2023	18 month period ending 30 September 2022
	£	£
Unrestricted funds		
Grants less than £3,000	0	2,498
	<hr/> 0	<hr/> 2,498
Restricted funds		
National Lottery Community Fund	69,584	82,815
Joseph Rowntree Foundation	-	5,000
Financial Inclusion – Benefits programme	-	8,068
The Liz and Terry Bramall Foundation	5,000	-
The Brelms Trust CIO	5,500	-
Grants less than £3,000	12,516	5,815
	<hr/> 92,600	<hr/> 101,698

National Lottery Community Fund

The National Lottery Community Fund have provided grant funding to contribute to the delivery of the advocacy services delivered by OCA Y along with the general management and running of the charity. This current element of funding was secured in 2021 for the period from September 2021 to September 2025 and income tapers over the 4 year term. In order to mitigate for the reducing National Lottery funding, grant funding has been identified and secured from other sources.

3. **Fundraising**

After disruption due to Covid, we are pleased to have recommenced community fundraising events during the year and held successful activities at St Crux, Fulford Show and West Bank Fair.

4. **Donations**

Donations (including Gift Aid) totalling £27,590 (2021 - £4,208) were received during the year. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who donated to the charity. Particular thanks are noted to the employees of Aviva and the Aviva Community Fund through which a donation of £25,950 was received, which has been invaluable in supporting the ongoing running of the charity.

Older Citizens Advocacy York (OCAY)

Notes to the Receipts and Payments Accounts for the 18 month period ended 30 September 2022 (continued)

5. Designated funds

At the year end, the following designated fund was held by the charity:

	12 month period ending 30 Sept 2023 £	18 month period ending 30 Sept 2022 £
Contingency fund	<u>18,000</u>	<u>18,000</u>
Total designated funds	18,000	18,000

Contingency fund

The Trustees have agreed to hold £18,000 (2021 - £15,000) in designated funds against contingencies such as staff redundancies, early office lease termination or any other unforeseen emergencies.

6. Change of accounting year end

In the prior period, it was decided by the Trustees to change the accounting year end date of OCAY from 31 March 2022 to 30 September 2022. Therefore, the comparative accounting period is for 18 months. The reason for making this change was to align the year end of OCAY with the year end of the Big Lottery grant, the largest funder of OCAY, to align financial reporting requirements.

OLDER CITIZENS ADVOCACY YORK

England & Wales - Charity number 1173795

Accounts

OCAY

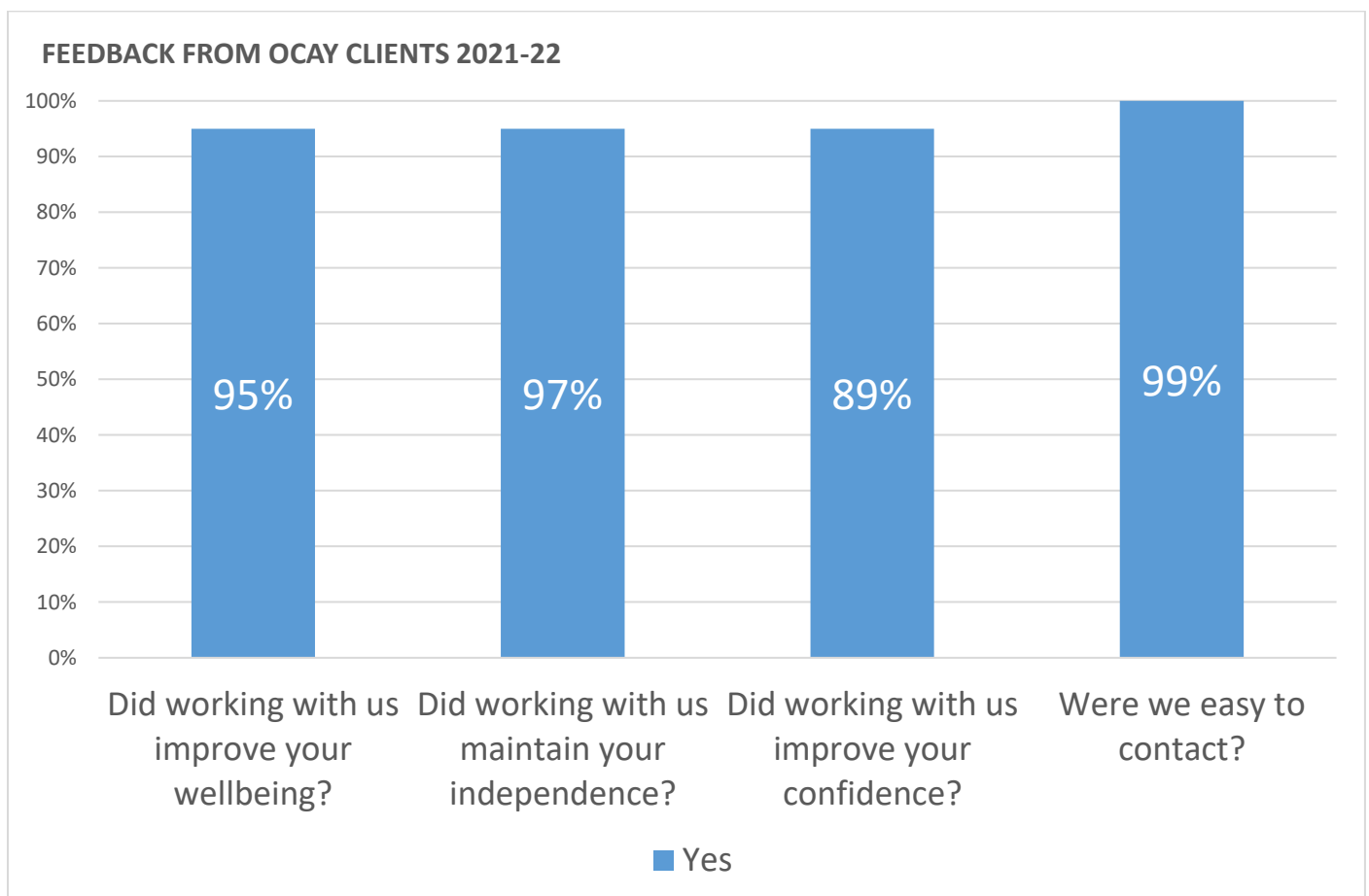
OLDER CITIZENS ADVOCACY-YORK

ANNUAL REPORT 2021-2022

Registered Charity No. 1173795

OCAY was founded in 2001 by a group of older people. They became involved in a pilot run by 'Better Government for Older People', intended to orchestrate better services and communities that worked for older people. We emerged to meet these needs, ensure inclusion, and get older people's voices heard. We have continued to evolve over the years, with funding from the National Lottery Community Fund supported by smaller grants from City of York Council wards and grant-making organisations alongside our own fundraising.

We have offered an independent, free and confidential advocacy service to those over the age of 50 in the City of York area for 21 years and continue to successfully advocate for those in need.

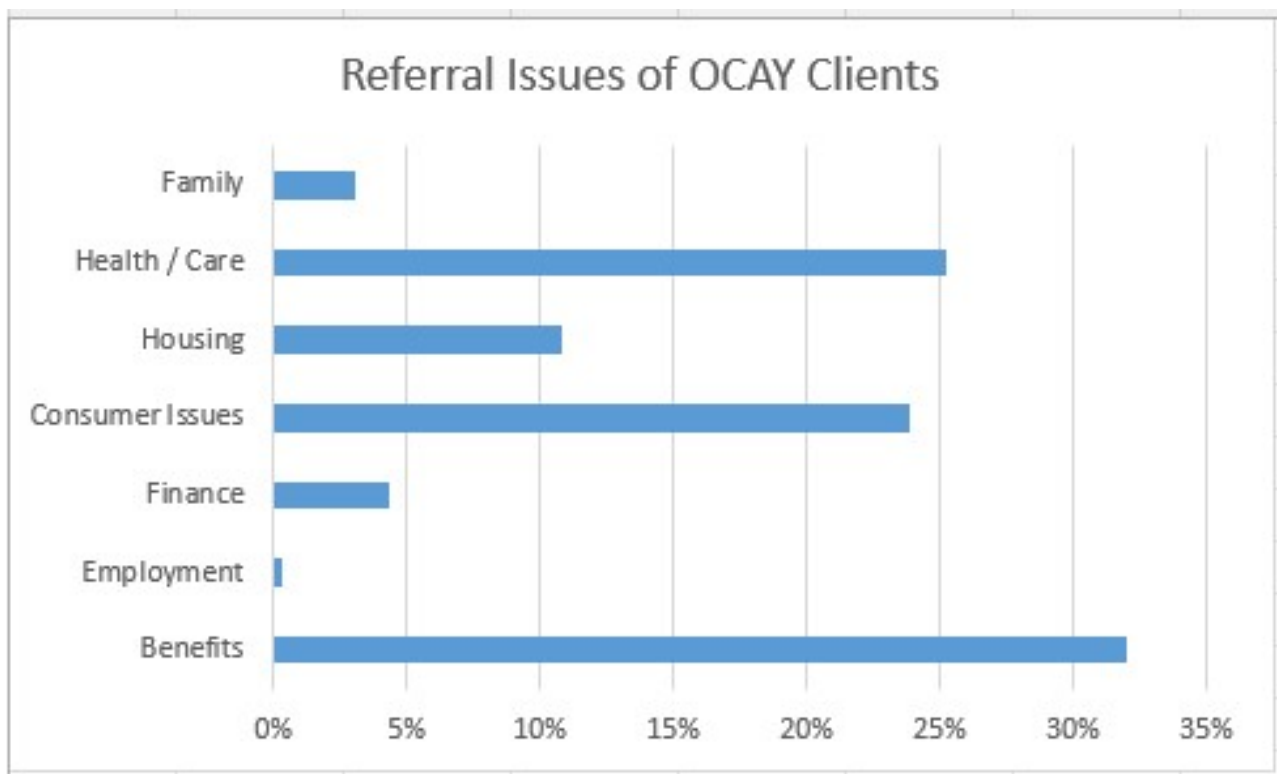




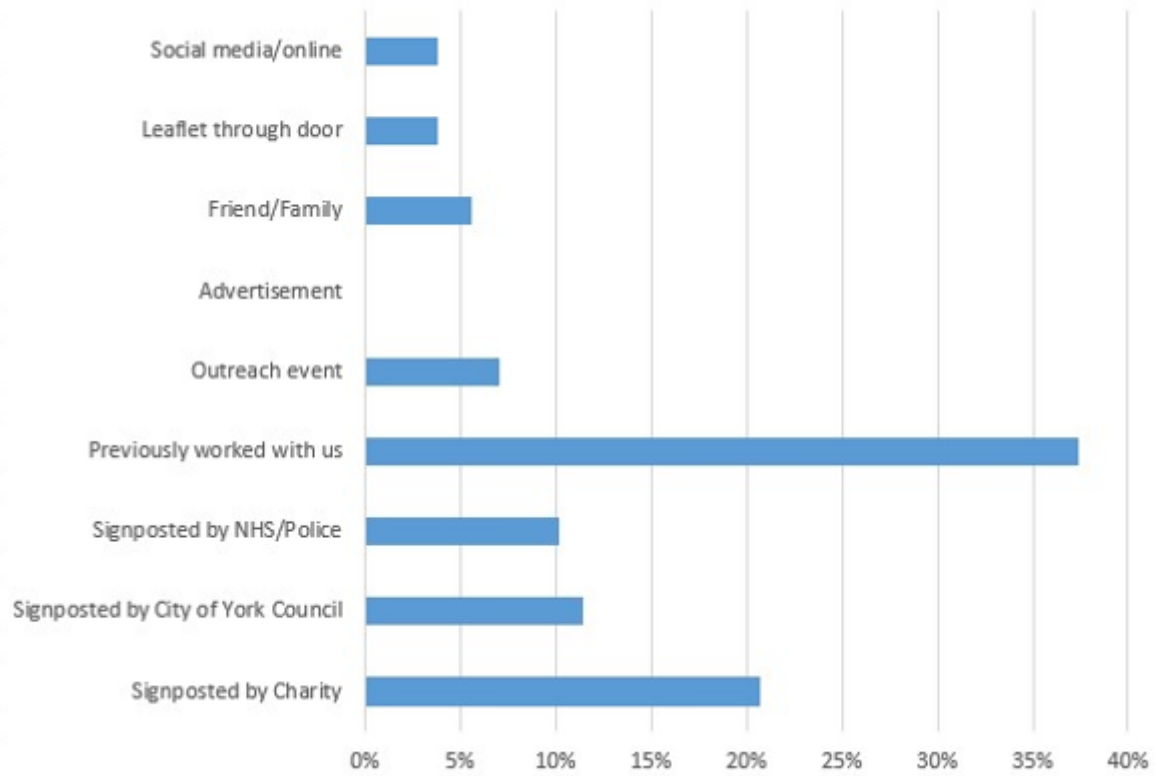
supported 463 older people in York in 2021/22

OCA Y supports clients with a really diverse range of issues. The current trend is helping more people with benefits, including information, form-filling and assessments. We've also helped with consumer complaints, family, housing and employment issues and we have helped people find out what is going on in their communities. We've seen an increase of people looking for support around Blue Badge applications in the past year from 4 in 2020/21 to 50 this year. We've spent **1271** hours directly advocating for clients this past 12 months. That's an average of **4.7 hours** of support for each client, which is an increase in **273 hours** but a decrease in time spent with each client by -1.5 hours. This is due to initial meetings being carried out over the telephone and offer advocates have been able to help over the telephone rather than face to face during the pandemic, ensuring the safety of everyone.

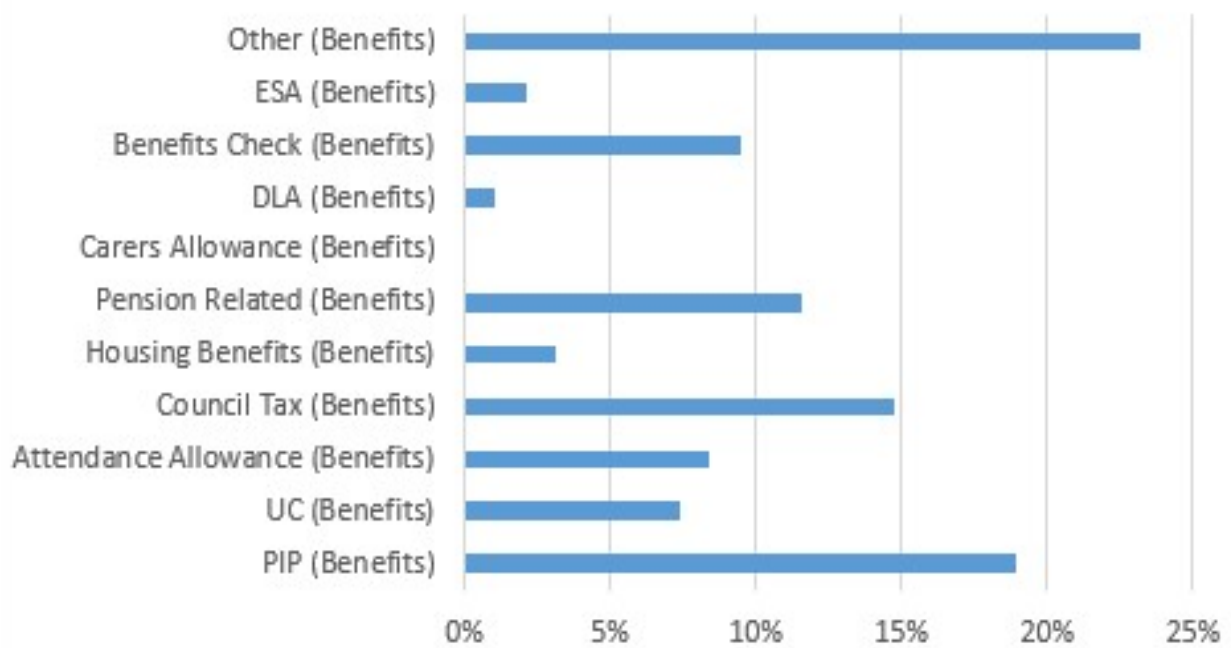
Clients come to OCA Y in a variety of ways - many are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us. Following the Coronavirus we are looking to starting to post leaflets through doors again and advertise in local magazines and papers to ensure that everybody is aware of our service and know they can contact us, whatever the issue.



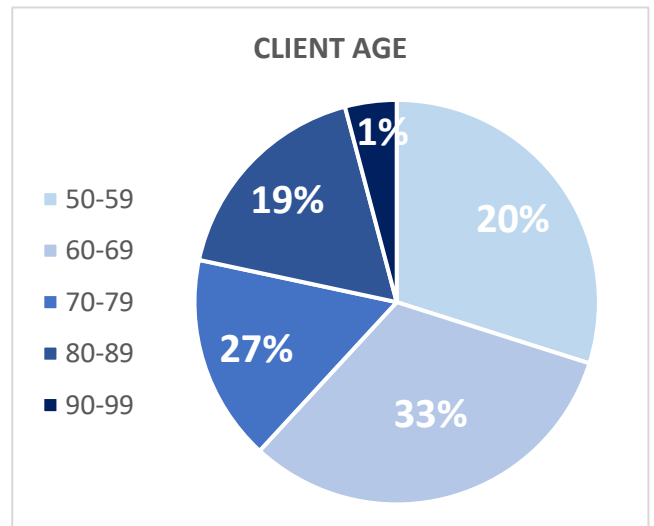
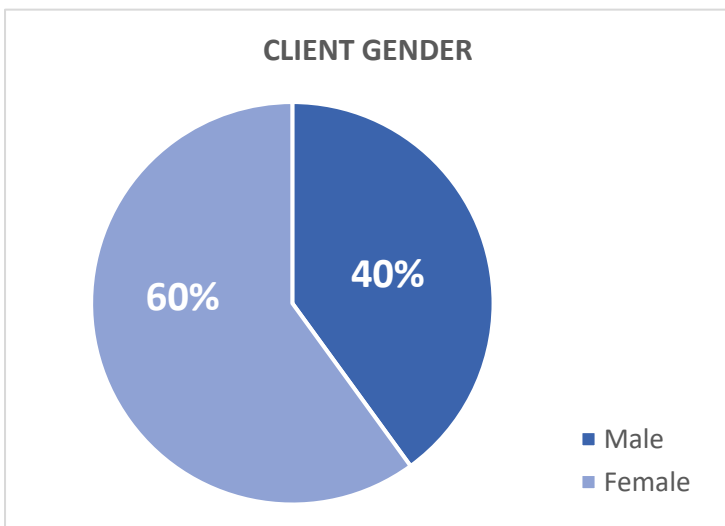
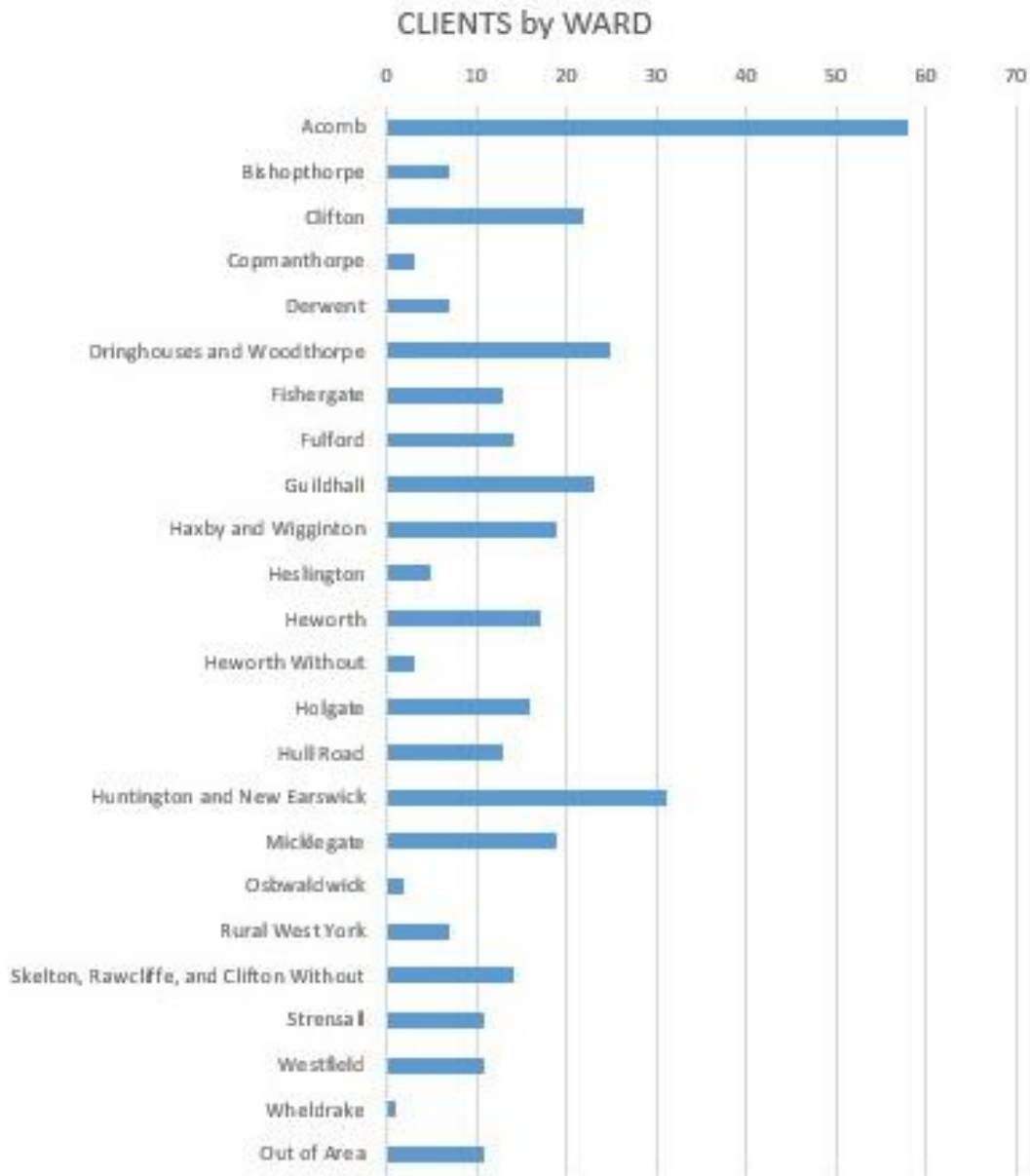
"How did you hear about OCAY?"



Breakdown of Benefits Issues



Where our clients come from





currently has 25 volunteer advocates and 9

Friends of OCAY...

Case Studies

Our service could not operate without our volunteers. We are very proud of the work that they do. They help a wide range of older people, supporting them with many different issues such as...

A client wanted help to complete a Blue Badge application as it was their first. They had severe back pain and had to take medication for this. They wanted a Blue Badge so that they could get parking when they visited the local hospital. The advocate spoke to the client on the phone and made an online application on their behalf. The application was successful, and they were awarded a Blue Badge. The client was very happy with the service and would use us again. They would recommend us to other people.

A client approached us for help with an Attendance Allowance application. The client had applied a few years ago and been turned down but since then their health had deteriorated. The client had various medical conditions. A volunteer advocate came forward to help with the application. They did research into the application process. The advocate filled in the application under instruction from the client and their son. The application was successful, and the client was awarded the higher rate of Attendance Allowance which is £92.40 per week. The client was very pleased with the outcome.

A client approached us who could not use their cooker as it was not working, so had to use a microwave instead which was not very practical. The client was on a low income and benefits and could not afford a new cooker. A volunteer advocate came forward to help the client. The volunteer looked on the Turn 2 Us website for details of charitable trusts who could provide grants for individuals. The volunteer found a suitable trust and applied for a grant for a new cooker. The application was successful, and a grant was provided towards a new cooker. The client was very pleased, and a new cooker will help to improve their quality of life.

A client wanted help with a PIP review form. They had complex, long term mental and physical health issues. They came to OCAY for help to fill in the form. A volunteer advocate came forward to help them. The volunteer encouraged them to collect relevant medical evidence including a supporting letter from their doctor. The volunteer supported the client to compile a draft copy of the review form. They helped the client to decide what information was relevant and would support the claim. The PIP form was submitted. The claim was successful without the need for an assessment.

The client's award was increased, and they received the standard mobility component of PIP as well as the enhanced rate for daily living. The award was extended until 2025.

Trustees, October 2021– September 2022:

Matthew Knight (Chair –from 10th May 2022)

Gillian Caldicott (Vice Chair from 10th May 2022)

Tracey Dennison (Trustee from 10th November 2021)

Sylvia Doughty (Secretary)

James Grainger (Honorary Treasurer - Associate Trustee)

Sharon Beattie

Chelsea Martin

Louise Reid (stepped down May 2022)

Rachel Totten (stepped down August 2022)

Bankers: HSBC & CAF

Examiner of Accounts: Caroline Cook

Patron: Professor Dianne Willcocks

Honorary Vice President: Douglas M. Craig, OBE

Address: The Priory Street Centre, 15 Priory Street,
York, YO1 6ET

Telephone: 01904 676200

Email: info@ocay.org.uk

www.oldercitizensadvocacyork.org.uk

OCAY

currently has 2 staff members, and 8 trustees

Dan Brittan, Lead Advocate: Dan manages his own caseload and carries out initial meetings with all clients. He also gives support and supervision to volunteer advocates. He uses his advocacy expertise to support development work and has just started to do outreach, such as St. Sampsons.

Abi Willis, Charity Administrator: Abi is the first line of contact for clients, volunteers and external organisations. She provides the day to day administrative, financial and business support for OCAY. She also undertakes outreach work in the community.

Abi and Dan are currently working together to run OCAY with the support of the trustees.

Chair's Report – Matthew Knight



It's been a year of considerable change for OCAY, but we have remained resilient thanks to the tremendous commitment of both our staff and our volunteer advocates. Having emerged from the pressures and frustrations of Covid we now face a winter of mounting case numbers (particularly benefits cases) as people struggle to cope with the cost of living and other pressures. The challenges are great, but so is our resolve, and we are determined to find ways of helping more York residents in the year ahead. In particular my thanks go to the advocates who have taken on additional cases in recent months and/or have committed to doing so during the winter. We are always looking of course for new advocates, so please do point any possible new recruits towards our Lead Advocate Dan Brittan.

In the last 12 months we have said farewell to our former Charity Manager Ruth Potter and my predecessor as Chair Rachel Totton. OCAY owes a considerable debt of gratitude to both Ruth and Rachel for steering OCAY through an important phase of its development, a phase which secured our Lottery funding, won a National Governance Award and saw us gain accreditation as an Investor in Volunteers.

We also lost Louise Reid as a Trustee during the year, and will miss her insights, support and ideas. We hope, when the time is right, that Louise may consider re-joining us. We welcomed Tracy Dennison to the Board as a new Trustee and Tracy brings very considerable HR and organisational experience and skills to OCAY. We will be seeking to recruit new Trustees over the next few months to strengthen the Board further.

The theme of our AGM this year is "working in partnership" and I want to acknowledge the excellent support and co-operation we continue to receive from colleague organisations in the City. As a small niche charity OCAY relies on others heavily both for client referrals and generally for raising awareness of what we can offer publicity and joint working.

What OCAY did in 2021-22

Why we did it

Continuing Covid -19 Impact on OCAY

OCAY had moved from a face to face to a telephone delivery model during the pandemic and we have kept this in place in the main where it is possible.

- Staff work back in the offices at Priory Street unless have a positive covid test.
- Staff were provided with relevant resources and equipment.
- Volunteer advocates only doing home visits, if necessary, with more appointments over the telephone and in OCAY meeting room.

To safeguard clients, staff and volunteers; to ensure that we continued to deliver our service to older people in York; to ensure volunteers were happy to use the phone; to update our clients and give reassurance that we were still able to help.

Volunteer Support, Recruitment and Training

Developed our volunteer support:

- Following feedback from volunteers, we delivered our regular volunteer peer support meetings using video conferencing. We are holding our first face to face group this month.
- We also held an information session in October where we had a speaker from IDAS to provide information about their services.
- Looking to volunteer social sessions to start to become face to face as well as some sessions online.
- Volunteer newsletters to be produced fortnightly as before the coronavirus pandemic.

Developed our volunteers' recruitment and training:

- We are looking to start advertising volunteer vacancies using print and social media and have an advert in the Local Link this December.
- We have started interviewing and recruiting volunteers face to face but can also use

- Volunteers can share their experience of working with different types of cases with each other and have the opportunity for learning and developing their role. The experience and skills of volunteers are valued and continue to develop.
- To increase volunteers' knowledge of services available to clients; to have information about what was happening during lockdown to other organisations.
- This helped with volunteer well-being; maintained social interaction between staff and volunteers; ensured that volunteers felt part of OCAY.
- This made it easier for potential volunteers to find out about our volunteering roles during the lockdown.
- Local people could continue to apply to volunteer and be interviewed without meeting face to face in the lockdown.
- All new volunteers gain the skills and understanding that they need in the role. The training could be delivered in a timely and very flexible way to meet the needs of new volunteers.

online conferencing when requested or is suitable. Database training is still being carried out online as it gives the volunteer a better idea of the tools they have at their disposal. Face to face training is becoming an option again, however.

- We rewrote our Induction training so that it could be delivered using video conferencing which is still being used.

- As a result, we can support more older people. The feedback from our annual volunteer survey shows that volunteers feel well supported and more confident in their role.

Quality Standards, Monitoring and Evaluation

Demonstrating our impact:

- **We carried out a longer-term Impact survey in June/July 2022 to understand the long-term impact of working with OCAY.**
- Embedded pre and post case questionnaire:
The questions cover feelings of control, being taken seriously, having your voice heard and the impact the advocacy issue is/was having on your well-being.
- **The responses were mainly favourable, participants appreciated the service and were extremely grateful for the support OCAY had provided. This is demonstrated by 100% of those answering the question (and 70% of the total sample who participated) saying that they would come back to OCAY for help in the future if they had a problem.**

- We want to increase our knowledge and understanding of the longer-term impact of our work on clients, to help us to improve our service delivery and find out what other factors could be impacting on older people's feelings of wellbeing.
- **Undertaking the pre and post case questionnaires, has enabled us to measure the distance travelled by clients working with us and make comparisons year on year. This also means that our improvement is led by feedback from our clients.**
- We want to understand how accessible our service is to people from different diversity strands. By comparing our data with that of the city, we can understand where we need to target our outreach work to ensure accessibility.
- **We wanted to demonstrate how we have developed ways of measuring our impact, both so that people using our advocacy service have external reassurance of the quality of the service, and to receive external recognition of the work Trustees have undertaken in this area.**

What OCAY did in 2021-22

Why we did it

Outreach

Reviewed our outreach strategy following the lifting of lockdown restrictions:

- We started face to face drop ins again following the ease of lockdowns, using
- We updated our outreach flyer as we had started 2 new outreach venues in Fulford and Dringhouses & Woodthorpe wards.
- We started working in partnership with Age UK and York Energy Advice to be able to cover more areas of York via the outreach programme.
- Continuing with the partnership newsletter in response to feedback from a consultation with partner organisations.
- Continuing to update the website with planned outreach and fundraising pages to come Jan 2023.

- Continuing to keep clients, staff and volunteers safe. To continue to reach new clients and to let previous clients know that we were open and to provide information about where and how other services could be accessed.
- To inform partners about our developments; to let partners know about our performance; to give information about our referral process.
- We wanted to ensure that our website was up to date and accessible with clear, good quality information so that clients and potential volunteers could access the information they needed.

Leadership and Strategy

Agreed new Strategic Plan 2020 -26:

- The Strategic Plan was reviewed and updated, with supporting action plans to form the basis of reporting to trustees at each board meeting.

Reviewed Trustee Roles

- Trustees took on special responsibility for areas of business.
- Role descriptions were reviewed.
- Recruitment and induction for new chair planned.

Maintained calendar of meeting using video conferencing, looking to introduce face to face meetings when able to.

Strategic Plan - To ensure that all the work undertaken by OCAY sits within our core mission.
Action Plans - so Trustees can be assured that the Charity Manager and the staff team are delivering against the plan. The Plan is also available to funders to give assurance of our organisational focus.

To ensure that role descriptions were fit for purpose; to enable the recruitment of a new chair; to sustain good governance of the organisation; to utilise the skills and experience of all trustees.

To ensure appropriate oversight and good governance of the charity.

What OCAY did in 2021–22

Why we did it

Partnerships and Networking

Maintained our work in partnerships and networks:

- Advice York Partnership.
- CVS Volunteer Forums.
- Ageing Well Partnership Board
- York Older Peoples Assembly.
- Armed Forces Covenant Steering Group.
- Human Rights Steering Group.
- Outreach partnership with Age UK and York Energy advice.

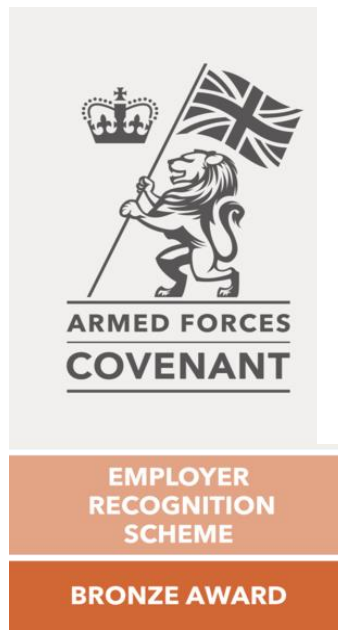
Sharing our thinking and development with partner organisations helps the voluntary sector to be sustainable and gives access to continuing new ideas and learning. The range of information gained from working in partnerships and networks also helps us to support our clients effectively and respond to the issues they have asked for help with.

Fund Raising Strategy

- The Fund-Raising Strategy reviewed by Trustees to try to diversify funding streams.
- Our community fund raising to develop the ideas to increase community fund raising opportunities and donations of gifts in kind, such as supermarket token schemes and fixed site collection boxes. We are currently crowdfunding with Aviva Community Fund.
- Corporate Fund-Raising Plan was agreed and Corporate Fund-raising packages to be relaunched January 2023.
- Applications made to 44 Trusts and Foundations for funding for 2021/22.
- Digital Fundraising - A new area for potential development is digital fund raising. However, we may need to access training or expertise to do this. Hybrid events will be all useful in a post covid environment using social media to increase outreach.

Fundraising remains a constant and increasingly challenging focus for sustainability, with a need for new and imaginative ideas and to seek to diversify funding streams. Applications were made on a weekly basis to sustain the charity in an everchanging funding environment with a number of applications being successful.

Trustees agreed sponsorship packages to diversify our funding streams. The strategy is to enable potential sponsors to easily commit something tangible and specific. Promote the sponsorship packages to the local business community and grow a corporate database to increase the direct audience we must communicate with. We have created a tier of packages (silver, gold & platinum) that clearly details what an organisation would get for a specific amount donated. The idea is that businesses who might be interested could simply choose the package that best suits their budget and own goals.



Older Citizens Advocacy York (OCAY)

**Receipts and Payments Accounts
for the 18 month period ended
30 September 2022**

Registered Charity No. 1173795

Older Citizens Advocacy York (OCA Y)

Independent Examiner's Report to the Trustees of Older Citizens Advocacy York

I report to the trustees on my examination of the accounts of Older Citizens Advocacy York (the Charity) for the period ended 30 September 2022.

Responsibilities and basis of report

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Use of this report

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

Caroline Cook

Caroline Cook
Independent Examiner

25/05/2023
.....

Older Citizens Advocacy York (OCA Y)

Summary of Receipts and Payments for the 18 month period ended 30 September 2022

	Notes	Unrestricted funds £	Designated funds £	Restricted funds £	1 April 2021 to 30 September 2022 Total £	1 April 2020 to 31 March 2021 Total £
Receipts						
Grant funding	2	2,498	-	101,698	104,196	111,132
Fundraising	3	758	-	-	758	123
Donations (inc Gift Aid)	4	3,958	-	250	4,208	12,224
Other income		46	-	-	46	149
Bank interest		78	-	-	78	13
Total receipts		7,338	-	101,948	109,286	123,641
Payments						
Staff costs		-	7,232	92,104	99,336	63,582
Staff training		-	-	179	179	-
Staff recruitment and expenses		161	-	1,507	1,668	-
Volunteer training		-	-	850	850	270
Volunteer expenses		-	-	354	354	389
Fundraising expenses		499	-	-	499	(154)
Property costs		-	-	13,071	13,071	8,791
Insurance		-	-	981	981	920
Telecommunications and IT		-	-	9,211	9,211	7,074
Asset purchases		-	-	-	-	1,224
Office supplies		-	-	1,992	1,992	850
General publicity and advertising		-	-	1,572	1,572	1,488
Outreach publicity and events		-	-	942	942	75
Investors in Volunteers accreditation		2,249	-	-	2,249	-
AGM expenses		-	-	257	257	-
Subscriptions		-	-	42	42	164
Bank charges		-	-	155	155	69
Total payments		2,909	7,232	123,217	133,358	84,742
Cash funds b/fwd at 1 April 2021		42,826	24,120	38,191	105,137	66,238
Net receipts/(payments) in the period		4,429	(7,232)	(21,269)	(24,072)	38,899
Funds transfers		(1,112)	1,112	-	-	-
Cash funds c/fwd at 30 September 2022		46,143	18,000	16,922	81,065	105,137

Older Citizens Advocacy York (OCA Y)

Statement of Assets and Liabilities at 30 September 2022

	Notes	Total 30 September 2022 £	Total 31 March 2021 £
Cash funds			
Deposit accounts		27,950	27,900
Current account		53,004	77,161
Petty cash		111	76
Total cash funds at period end		81,065	105,137
Represented by funds carried forward			
<u>Unrestricted funds:</u>			
General funds		46,143	42,829
Designated funds	5	18,000	24,120
<u>Restricted funds:</u>			
Big Lottery – Reaching Communities		6,940	14,750
Financial Inclusion – Benefits programme		(264)	(1,750)
Charles Hayward Foundation – Benefits programme		-	2,089
Aviva – Dementia and Benefits		750	1,986
Two Ridings Community Foundation – Belfry fund		1,646	-
Two Ridings Community Foundation – Benefits programme		-	3,780
The Charles and Elsie Sykes Trust – Core funding		-	5,000
Independent Age – Core funding		4,673	7,583
Schroder Charity Trust – Core funding		-	4,000
Tesco – Bags for Help		506	-
Age UK Outreach		841	-
NHS APP		1,092	-
Common Good Trust		738	750
Total funds at period end		81,065	105,137

Other Monetary Assets


The Charity does not have any other Monetary Assets.

Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

The accounts were approved and authorised for issue by the Trustees on 16 May 2023 and signed on their behalf by:


Matthew Knight
Chair of Trustees


Sylvia Doughty
Trustee

Older Citizens Advocacy York (OCAY)

Notes to the Receipts and Payments Accounts for the 18 month period ended 30 September 2022

1. These accounts have been prepared under the historical cost convention, on a receipts and payments basis, in accordance with Section 133 of the Charities Act 2011 and following the guidance for accounting for smaller charities issued by the Charity Commission.

2. **Grant funding**

	18 month period ending 30 September 2022 £	12 month period ending 31 March 2021 £
Unrestricted funds		
Donald Forrester Trust	-	5,000
Training course bursary	-	3,200
Grants less than £3,000	2,498	5,724
	2,498	13,924
Restricted funds		
Big Lottery – Reaching Communities	82,815	55,233
Joseph Rowntree Foundation	5,000	-
Charles Hayward Foundation – Benefits programme	-	5,500
The Charles & Elsie Sykes Trust – Core funding	-	5,000
Independent Age – Core funding	-	13,405
Schroder Charity Trust – Core funding	-	4,000
Two Ridings Community Foundation – Benefits programme	-	4,500
Financial Inclusion – Benefits programme	8,068	3,750
Grants less than £3,000	5,815	5,820
	101,698	97,208

Big Lottery – Reaching Communities

Reaching Communities have provided grant funding to contribute to the delivery of the advocacy services delivered by OCAY along with the general management and running of the charity.

3. **Fundraising**

During the year, unfortunately due to Covid-19, the charity was not able to partake in the fundraising events that it would usually hold. It is hoped that in the coming year and beyond, these fundraising activities can recommence.

4. **Donations**

Donations (including Gift Aid) totalling £4,208 (2021 - £12,224) were received during the year. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who donated to the charity.

Older Citizens Advocacy York (OCAY)

Notes to the Receipts and Payments Accounts for the 18 month period ended 30 September 2022 (continued)

5. Designated funds

At the year end, the following two designated funds were held by the charity:

	18 month period ending 30 September 2022 £	12 month period ending 31 March 2021 £
Contingency fund	18,000	15,000
Lord Mayor of York – funding for 2021/22	-	9,120
Total designated funds	18,000	24,120

Contingency fund

The Trustees have agreed to hold £18,000 (2021 - £15,000) in designated funds against contingencies such as staff redundancies, early office lease termination or any other unforeseen emergencies.

Lord Mayor of York fund

In the 18 month period to 30 September 2022, £7,232 of the £9,120 designated fund was spent. The remaining £1,888 has been released back into general unrestricted funds by the Trustees.

6. Change of accounting year end

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The comparative period reported within these financial statements is a 12 month period ending 31 March 2021.

OAY to sign

Final Audit Report

2023-05-25

Created:	2023-05-25
By:	Caroline Cook (caroline.cook@azets.co.uk)
Status:	Signed
Transaction ID:	CBJCHBCAABAARSDwEqovXeR_MobGrMdweHwqhP-TtGT

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Older Citizens Advocacy York (OCAY)

**Receipts and Payments Accounts
for the 18 month period ended
30 September 2022**

Registered Charity No. 1173795

Older Citizens Advocacy York (OCA Y)

Independent Examiner's Report to the Trustees of Older Citizens Advocacy York

I report to the trustees on my examination of the accounts of Older Citizens Advocacy York (the Charity) for the period ended 30 September 2022.

Responsibilities and basis of report

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Use of this report

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

Caroline Cook

Caroline Cook
Independent Examiner

25/05/2023
.....

Older Citizens Advocacy York (OCA Y)

Summary of Receipts and Payments for the 18 month period ended 30 September 2022

	Notes	Unrestricted funds £	Designated funds £	Restricted funds £	1 April 2021 to 30 September 2022 Total £	1 April 2020 to 31 March 2021 Total £
Receipts						
Grant funding	2	2,498	-	101,698	104,196	111,132
Fundraising	3	758	-	-	758	123
Donations (inc Gift Aid)	4	3,958	-	250	4,208	12,224
Other income		46	-	-	46	149
Bank interest		78	-	-	78	13
Total receipts		7,338	-	101,948	109,286	123,641
Payments						
Staff costs		-	7,232	92,104	99,336	63,582
Staff training		-	-	179	179	-
Staff recruitment and expenses		161	-	1,507	1,668	-
Volunteer training		-	-	850	850	270
Volunteer expenses		-	-	354	354	389
Fundraising expenses		499	-	-	499	(154)
Property costs		-	-	13,071	13,071	8,791
Insurance		-	-	981	981	920
Telecommunications and IT		-	-	9,211	9,211	7,074
Asset purchases		-	-	-	-	1,224
Office supplies		-	-	1,992	1,992	850
General publicity and advertising		-	-	1,572	1,572	1,488
Outreach publicity and events		-	-	942	942	75
Investors in Volunteers accreditation		2,249	-	-	2,249	-
AGM expenses		-	-	257	257	-
Subscriptions		-	-	42	42	164
Bank charges		-	-	155	155	69
Total payments		2,909	7,232	123,217	133,358	84,742
Cash funds b/fwd at 1 April 2021		42,826	24,120	38,191	105,137	66,238
Net receipts/(payments) in the period		4,429	(7,232)	(21,269)	(24,072)	38,899
Funds transfers		(1,112)	1,112	-	-	-
Cash funds c/fwd at 30 September 2022		46,143	18,000	16,922	81,065	105,137

Older Citizens Advocacy York (OCA Y)

Statement of Assets and Liabilities at 30 September 2022

	Notes	Total 30 September 2022 £	Total 31 March 2021 £
Cash funds			
Deposit accounts		27,950	27,900
Current account		53,004	77,161
Petty cash		111	76
Total cash funds at period end		81,065	105,137
Represented by funds carried forward			
<u>Unrestricted funds:</u>			
General funds		46,143	42,829
Designated funds	5	18,000	24,120
<u>Restricted funds:</u>			
Big Lottery – Reaching Communities		6,940	14,750
Financial Inclusion – Benefits programme		(264)	(1,750)
Charles Hayward Foundation – Benefits programme		-	2,089
Aviva – Dementia and Benefits		750	1,986
Two Ridings Community Foundation – Belfry fund		1,646	-
Two Ridings Community Foundation – Benefits programme		-	3,780
The Charles and Elsie Sykes Trust – Core funding		-	5,000
Independent Age – Core funding		4,673	7,583
Schroder Charity Trust – Core funding		-	4,000
Tesco – Bags for Help		506	-
Age UK Outreach		841	-
NHS APP		1,092	-
Common Good Trust		738	750
Total funds at period end		81,065	105,137

Other Monetary Assets


The Charity does not have any other Monetary Assets.

Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

The accounts were approved and authorised for issue by the Trustees on 16 May 2023 and signed on their behalf by:


Matthew Knight
Chair of Trustees


Sylvia Doughty
Trustee

Older Citizens Advocacy York (OCAY)

Notes to the Receipts and Payments Accounts for the 18 month period ended 30 September 2022

1. These accounts have been prepared under the historical cost convention, on a receipts and payments basis, in accordance with Section 133 of the Charities Act 2011 and following the guidance for accounting for smaller charities issued by the Charity Commission.

2. **Grant funding**

	18 month period ending 30 September 2022 £	12 month period ending 31 March 2021 £
Unrestricted funds		
Donald Forrester Trust	-	5,000
Training course bursary	-	3,200
Grants less than £3,000	2,498	5,724
	2,498	13,924
Restricted funds		
Big Lottery – Reaching Communities	82,815	55,233
Joseph Rowntree Foundation	5,000	-
Charles Hayward Foundation – Benefits programme	-	5,500
The Charles & Elsie Sykes Trust – Core funding	-	5,000
Independent Age – Core funding	-	13,405
Schroder Charity Trust – Core funding	-	4,000
Two Ridings Community Foundation – Benefits programme	-	4,500
Financial Inclusion – Benefits programme	8,068	3,750
Grants less than £3,000	5,815	5,820
	101,698	97,208

Big Lottery – Reaching Communities

Reaching Communities have provided grant funding to contribute to the delivery of the advocacy services delivered by OCAY along with the general management and running of the charity.

3. **Fundraising**

During the year, unfortunately due to Covid-19, the charity was not able to partake in the fundraising events that it would usually hold. It is hoped that in the coming year and beyond, these fundraising activities can recommence.

4. **Donations**

Donations (including Gift Aid) totalling £4,208 (2021 - £12,224) were received during the year. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who donated to the charity.

Older Citizens Advocacy York (OCAY)

Notes to the Receipts and Payments Accounts for the 18 month period ended 30 September 2022 (continued)

5. Designated funds

At the year end, the following two designated funds were held by the charity:

	18 month period ending 30 September 2022 £	12 month period ending 31 March 2021 £
Contingency fund	18,000	15,000
Lord Mayor of York – funding for 2021/22	-	9,120
Total designated funds	18,000	24,120

Contingency fund

The Trustees have agreed to hold £18,000 (2021 - £15,000) in designated funds against contingencies such as staff redundancies, early office lease termination or any other unforeseen emergencies.

Lord Mayor of York fund

In the 18 month period to 30 September 2022, £7,232 of the £9,120 designated fund was spent. The remaining £1,888 has been released back into general unrestricted funds by the Trustees.

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OAY to sign

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OLDER CITIZENS ADVOCACY YORK

England & Wales - Charity number 1173795

Accounts

O C A Y

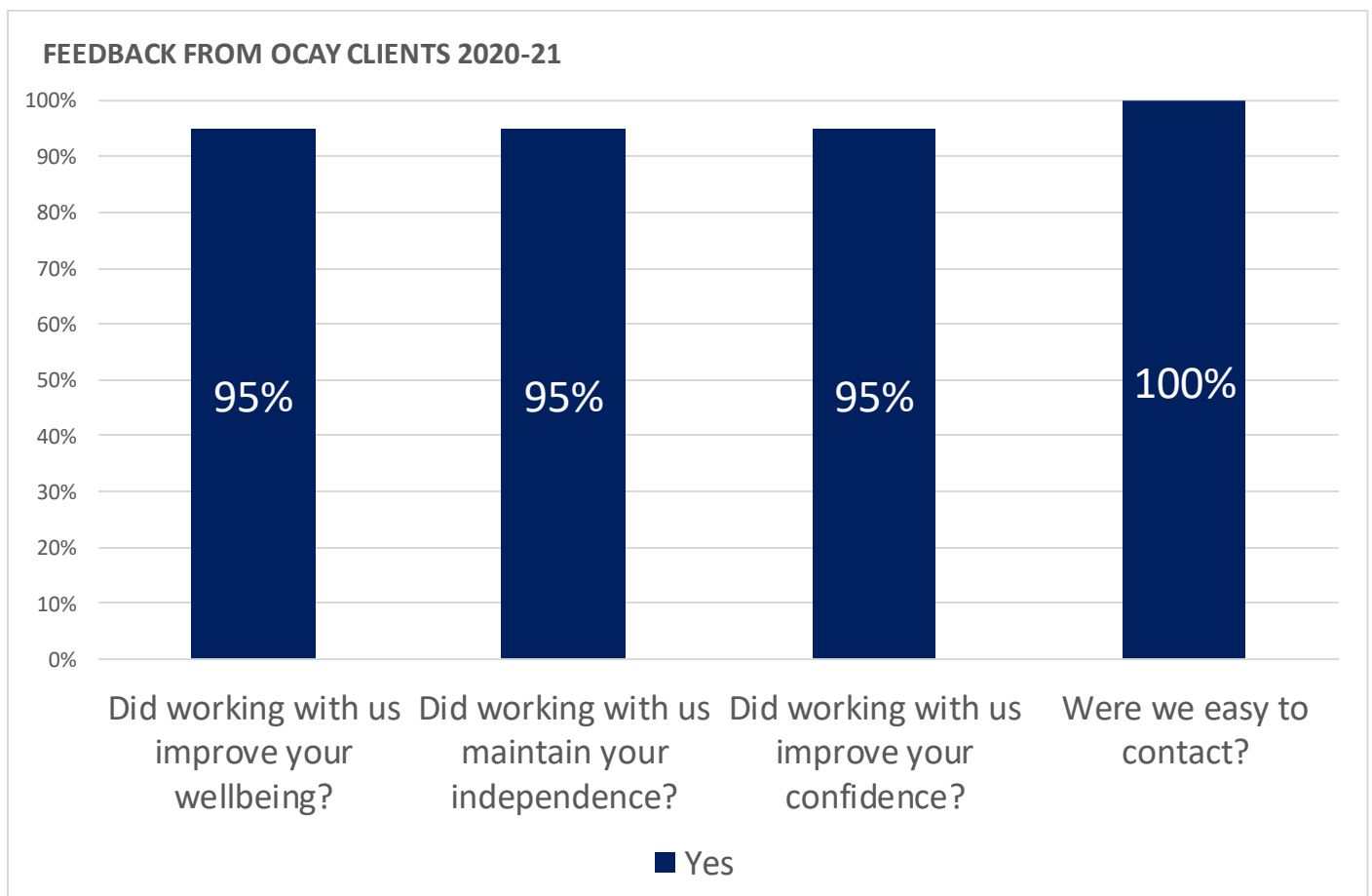
OLDER CITIZENS ADVOCACY-YORK

ANNUAL REPORT 2020-2021

Registered Charity No. 1173795

OCA Y was founded in 2001 by a group of older people. They became involved in a pilot run by 'Better Government for Older People', intended to orchestrate better services and communities that worked for older people. We emerged to meet these needs, ensure inclusion, and get older people's voices heard. We have continued to evolve over the years, with funding from the National Lottery Community Fund supported by smaller grants from City of York Council wards and grant-making organisations alongside our own fundraising.

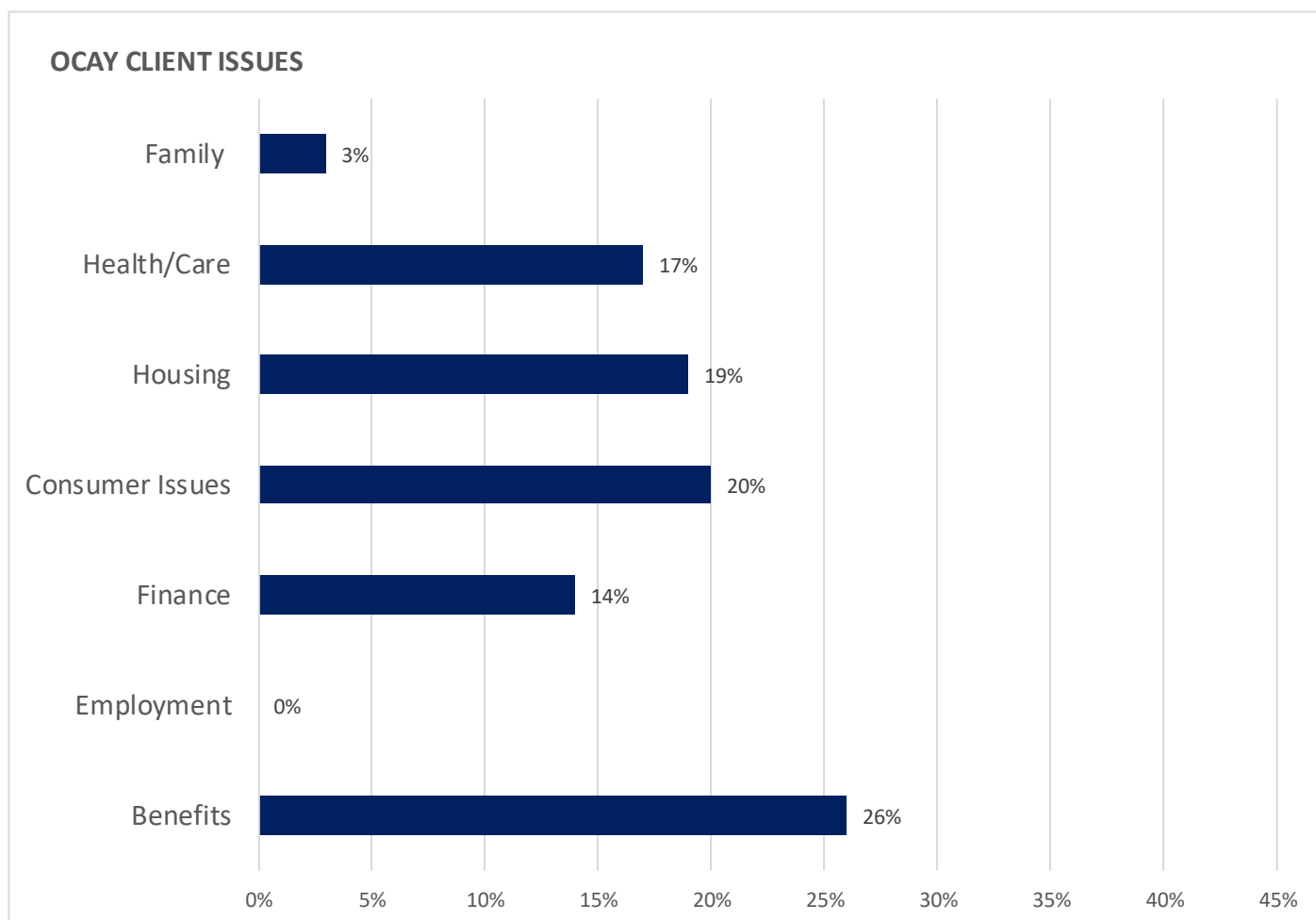
We have offered an independent, free and confidential advocacy service to those over the age of fifty in the City of York area for 20 years and continue to successfully advocate for those in need.



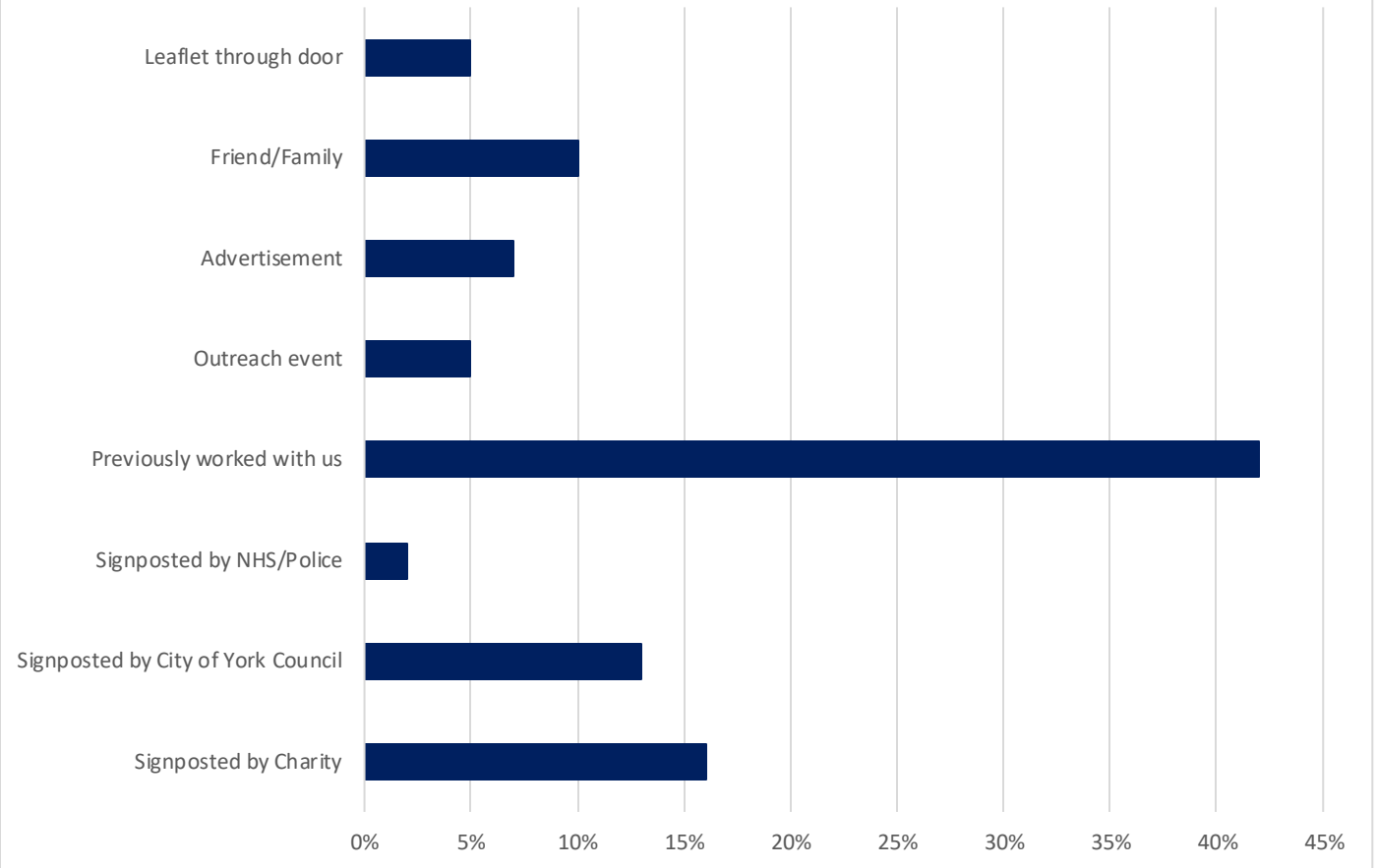
OCAY supported 290 older people in York in 2020/21

OCAY supports clients with a really diverse range of issues. We've helped people with benefits, including information, form-filling and assessments. We've also helped with consumer complaints, family, housing and employment issues and we have helped people find out what is going on in their communities. We've seen an increase of people looking for support around housing in the past year, from private property and public property issues, to supporting people struggling with neighbour disputes. We've spent 998 hours directly advocating for clients this past 12 months. That's an average of 6 hours of support for each client!

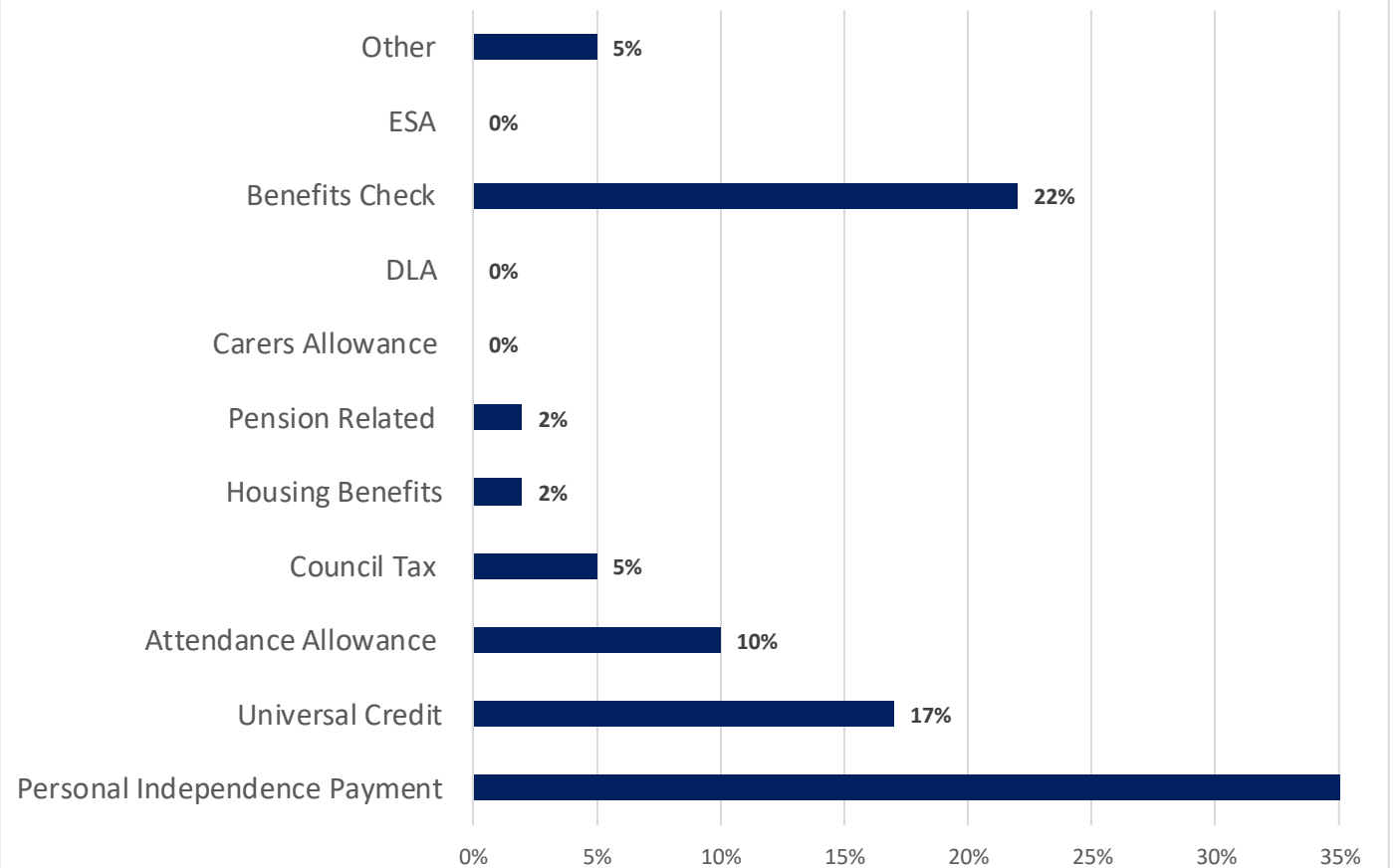
Clients come to OCAY in a variety of ways - some are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us. We post leaflets through doors and advertisements in local magazines and papers to ensure that everybody is aware of our service and know they can contact us, whatever the issue.



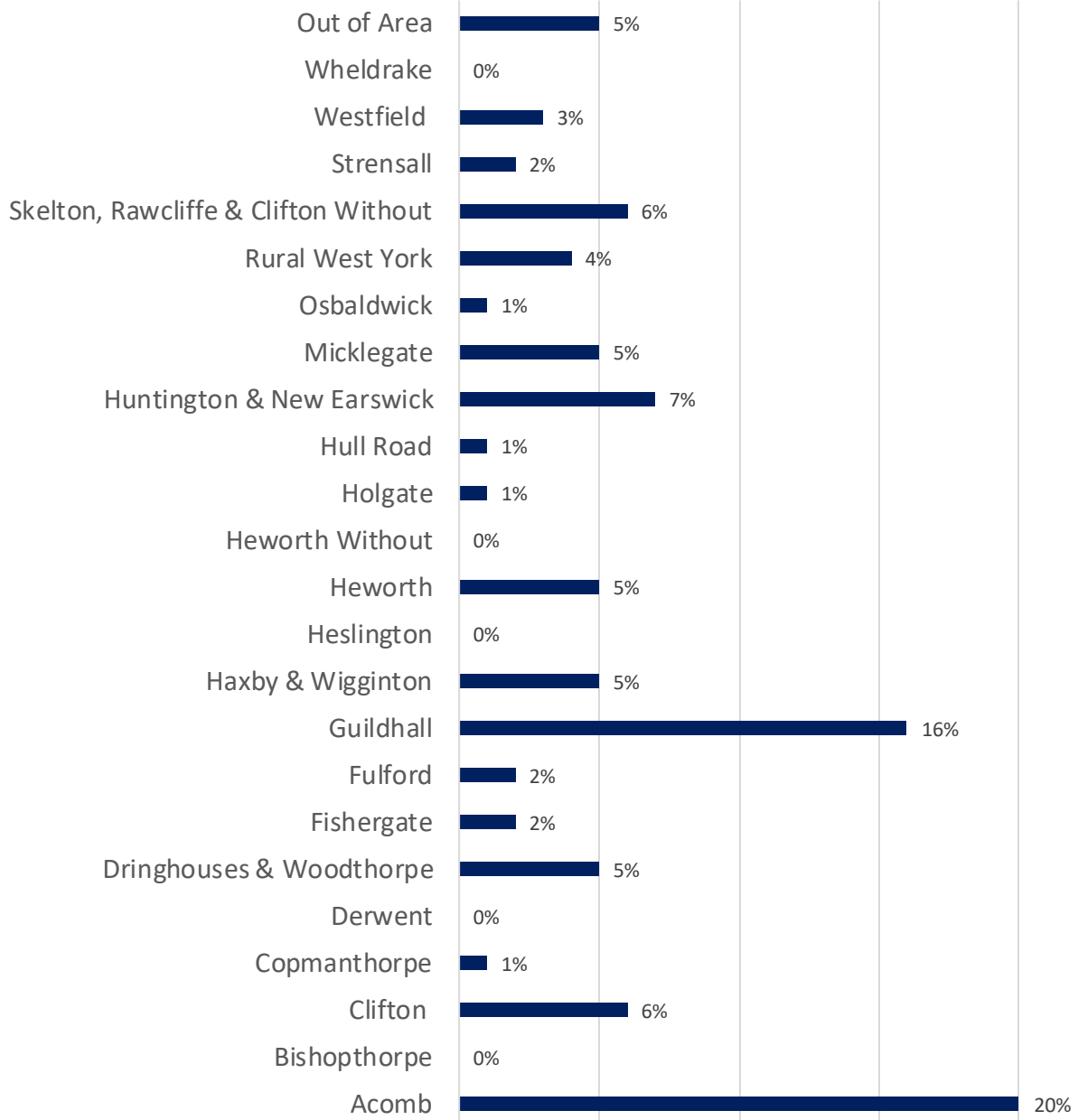
WHERE OUR CLIENTS HEARD ABOUT US



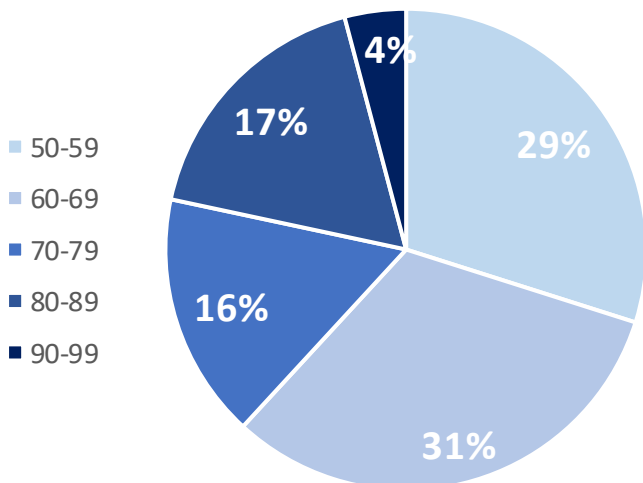
TYPES OF BENEFITS



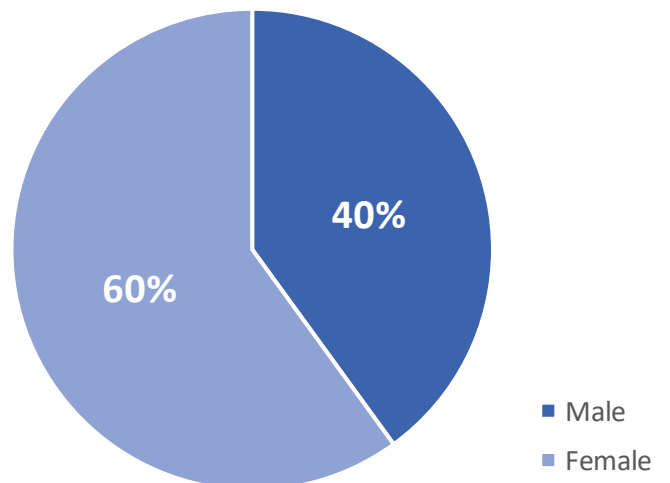
THIS IS WHERE OUR CLIENTS LIVE



CLIENT AGE



CLIENT GENDER



Our service could not operate without our volunteers. We are very proud of the work that they do. They help a wide range of older people, supporting them with many different issues such as...

Client approached us for help as he was in rent arrears and threatened with eviction. He was not currently working and was receiving Universal Credit. The client lived in a housing association property. A volunteer advocate took the case and contacted the Welfare Benefits Unit who provided detailed information about the client's options. The advocate communicated with the client's daughter who contacted the housing association. There was a delay and difficulty communicating with the housing association. The advocate contacted the housing association directly herself and eventually it was agreed that the client's rent arrears should be removed, and the client's rent account was in credit. The advocate was given excellent feedback and told she was 'amazing' and that the client's mental health had really improved.

We were approached by an elderly lady who had been referred to us by a local charity. The Lead Advocate phoned her up for an initial assessment. The lady was distressed as a large branch from a neighbouring building site had fallen on her garden. The lady had mobility problems. A volunteer advocate took the case and did some research about who owned the neighbouring property. Eventually after making several enquiries the advocate discovered the company who owned the property. He contacted the company and they agreed to remove the branch from the lady's garden at no cost. The lady was delighted with the outcome and phoned the charity manager to express her gratitude.

Client was currently receiving the standard rate of Personal Independence Payment. She received a letter saying that this needed to be reviewed. An advocate filled in the review form under the client's instruction and also attached additional medical evidence. The client was offered an assessment on the phone but did not feel well enough to participate in this. The advocate asked for a paper-based assessment for the client, and this was accepted. Eventually a decision was made, and the client's award was increased to the higher level, known as the Enhanced rate. This was an indefinite award and will only be reviewed in 2030. The advocate helped to secure the client an extra £70 per week plus nearly £4000 in back pay. The client was very pleased with the support we had given her. She stated, "I appreciate All your help and the Advocacy without you All I wouldn't be here."

Client with complex mental health needs approached us for assistance. He was living in sheltered housing. He currently had no access to the internet. He spoke to a volunteer advocate and asked him to find more information about available broadband packages that included a sports channel and a landline. The advocate did research on the internet and sent information to the client about three potential options. He then phoned the client to explain in detail about the available options. The client then needed some time to think before he made a final decision about what to do.

Facts.... 80% of our volunteers are women. Our volunteers range between the ages of 20 and 84.

O**C****A****Y** currently has three staff members, and nine trustees

Ruth Potter, Fundraising Charity Manager: Ruth manages the work of OCA Y overall and monitors and develops the effectiveness of the service on an ongoing basis. She is responsible for applying for grants, and leading organisational development.

Dan Brittan, Lead Advocate: Dan manages his own caseload and carries out initial meetings with all clients. He also gives support and supervision to volunteer advocates. He uses his advocacy expertise to support development work.

Kayleigh Fox, Charity Support Assistant: Kayleigh is the first line of contact for clients, volunteers and external organisations. She provides the day to day administrative, financial and business support for OCA Y. She also undertakes outreach work in the community.

Trustees, April 2020 – March 2021:

Rachel Totton (Vice Chair – Until 11th July 2020, Chair From 11th July 2020)

Susan Hannon (Chair – Until 11th July 2020)

Sylvia Doughty (Secretary)

James Grainger (Honorary Treasurer - Associate Trustee)

Sharon Beattie

Alan Filby

Chelsea Martin

Louise Reid

Gillian Caldicott

Jean Reed (Associate Trustee – From 11th November 2020)

Bankers: HSBC & CAF

Examiner of Accounts: Caroline Cook

Patron: Professor Dianne Willcocks

Honorary Vice President: Douglas M. Craig, OBE

Address: The Priory Street Centre, 15 Priory Street, York, YO1 6ET

Telephone: 01904 676200

Email: info@ocay.org.uk

www.oldercitizensadvocacyyork.org.uk

Chair's Report: At the end of an extraordinary year for us all, I am incredibly proud of the way that OCAY has responded to the pandemic. Ours is a 'people' service – normally involving face to face work with people who are often in a challenging and distressing situation. Despite the fact that we have been unable to meet face to face, OCAY has managed to continue delivering its service without any significant loss of momentum. Client numbers this year are almost as high as in the previous year, with telephone support proving a viable way of delivering advocacy – we would not necessarily have expected this to work so well, but it has been a great relief to be able to continue supporting our clients.

Of course, this is due to the commitment and energy of our extraordinary staff and volunteers. Staff and volunteers have worked from home, over the phone, and over the internet, and like so many other organisations have had to develop new skills to make this work well. They have approached this with incredible positivity and flexibility. Trustees have also adapted brilliantly to Zoom meetings and continued to provide support and challenge and strategic direction as they did before, taking a keen interest in how OCAY coped with the pandemic, but also keeping a sharp focus on strategic direction. We were delighted in 2020 to be recognised as winners in the National Governance Awards for our work on improving impact. We were sorry to say goodbye to Susan Hannon, who had been a committed trustee.

We are so grateful to a wide range of funders for generously supporting our work, and in particular to the Big Lottery for extending deadlines for project completion and reporting and also for providing emergency funding for 6 months. We recognise their ongoing support during this difficult year. We are also deeply grateful to our partner organisations in York who work alongside us to support clients and refer people to our service. We feel strongly connected to a people and community focused network of organisations in York, helping to make this a place where people and organisations can turn to each other for help and support.

Rachel Totton



What OCA^Y did in 2020-21

Why we did it

Covid -19 Impact on OCA^Y

Moved from a face to face to a telephone delivery model.

- Staff and volunteers worked from home in line with the contingency plan, risk assessments and Government guidance.
- Staff were provided with relevant resources and equipment.
- We spoke to all volunteers and current clients.

To safeguard clients, staff and volunteers; to ensure that we continued to deliver our service to older people in York; to ensure volunteers were happy to use the phone; to update our clients and give reassurance that we were still able to help.

Volunteer Support, Recruitment and Training

Developed our volunteer support:

- Following feedback from volunteers, we delivered our regular volunteer peer support meetings using video conferencing.
- We also held information sessions where speakers from organisations such as Welfare Benefits Unit and IAPT (York and Selby) provide information about their services. These were also delivered using video conferencing.
- Volunteers also requested social sessions to meet with staff and other volunteers during the lockdown.
- Volunteer newsletter produced weekly instead of fortnightly.

Volunteers can share their experience of working with different types of cases with each other and have the opportunity for learning and developing their role. The experience and skills of volunteers are valued and continue to develop.

To increase volunteers' knowledge of services available to clients; to have information about what was happening during lockdown to other organisations.

This helped with volunteer well-being; maintained social interaction between staff and volunteers; ensured that volunteers felt part of OCA^Y.

This made it easier for potential volunteers to find out about our volunteering roles during the lockdown.

Developed our volunteers' recruitment and training:

- We advertised volunteer vacancies using print and social media.
- We interviewed and recruited volunteers using video conferencing.
- We rewrote our Induction training so that it could be delivered using video conferencing.

Local people could continue to apply to volunteer and be interviewed without meeting face to face in the lockdown.

All new volunteers gain the skills and understanding that they need in the role. The training could be delivered in a timely and very flexible way to meet the needs of new volunteers.

Improved our volunteer retention:

We have increased the number of volunteers and our volunteers are staying with us.

As a result, we can support more older people. The feedback from our annual volunteer survey shows that volunteers feel well supported and more confident in their role.

Quality Standards, Monitoring and Evaluation

Demonstrating our impact:

- We developed a pilot survey to understand the long-term impact of working with OCAY.

Embedded pre and post case questionnaire:

- The questions cover feelings of control, being taken seriously, having your voice heard and the impact the advocacy issue is/was having on your well-being.

Diversity monitoring:

- Importantly, we embedded our diversity monitoring and now routinely ask clients for diversity information.

The National Charity Governance Awards:

We won the award in the category 'Improving Impact'.

Preparation for the renewal of Investing in Volunteers started

Outreach

Reviewed our outreach strategy considering lockdown restrictions:

- We stopped face to face drop ins.
- We increased our use of print and social media.
- We delivered leaflets during the summer when lockdown was partially lifted.

Developed a partnership newsletter in response to feedback from a consultation with partner organisations.

Modernisation of the website.

We want to increase our knowledge and understanding of the longer-term impact of our work on clients, to help us to improve our service delivery and find out what other factors could be impacting on older people's feelings of wellbeing.

Undertaking the pre and post case questionnaires, has enabled us to measure the distance travelled by clients working with us and make comparisons year on year. This also means that our improvement is led by feedback from our clients.

We want to understand how accessible our service is to people from different diversity strands. By comparing our data with that of the city, we can understand where we need to target our outreach work to ensure accessibility.

We wanted to demonstrate how we have developed ways of measuring our impact, both so that people using our advocacy service have external reassurance of the quality of the service, and to receive external recognition of the work Trustees have undertaken in this area.

The existing Award ends in 2021. The renewal of the standard will give external accreditation of the quality of our volunteer recruitment, training and support.

To keep clients, staff and volunteers safe. To continue to reach new clients and to let previous clients know that were open; to use limited resources as effectively as possible; to provide clients with information about what we could do to support them during the lockdown and to provide information about where and how other services could be accessed.

To inform partners about our developments; to let partners know about our performance; to give information about our referral process.

We wanted to ensure that our website was up to date and accessible with clear, good quality information so that clients and potential volunteers could access the information they needed.

What OCA^Y did in 2020-21

Leadership and Strategy

Agreed new Strategic Plan 2020 -26:

- The Strategic Plan was reviewed and updated, with supporting action plans to form the basis of reporting to trustees at each board meeting.

Reviewed Trustee Roles

- Trustees took on special responsibility for areas of business.
- Role descriptions were reviewed.
- Recruitment and induction for new chair planned.

Maintained calendar of meeting using video conferencing.

Why we did it

Strategic Plan - To ensure that all the work undertaken by OCA^Y sits within our core mission. Action Plans - so Trustees can be assured that the Charity Manager and the staff team are delivering against the plan. The Plan is also available to funders to give assurance of our organisational focus.

To ensure that role descriptions were fit for purpose; to enable the recruitment of a new chair; to sustain good governance of the organisation; to utilise the skills and experience of all trustees.

To ensure appropriate oversight and good governance of the charity.

Partnerships and Networking

Maintained our work in partnerships and networks:

- Advice York Partnership.
- CVS Volunteer Forums.
- Ageing Well Partnership Board.
- York Older Peoples Assembly.
- Armed Forces Covenant Steering Group.
- Human Rights Steering Group.

Sharing our thinking and development with partner organisations helps the voluntary sector to be sustainable and gives access to continuing new ideas and learning. The range of information gained from working in partnerships and networks also helps us to support our clients effectively and respond to the issues they have asked for help with.

Fund Raising Strategy

- The Fund-Raising Strategy reviewed by Trustees to try to diversify funding streams.
- Our community fund raising was cancelled.
- Corporate Fund-Raising Plan was agreed and Corporate Fund-raising packages launched.
- Emergency Funding was granted by the National Lottery Community Fund, Independent Age and Two Ridings Foundation.

Fundraising remains a constant and increasingly challenging focus for sustainability, with a need for new and imaginative ideas and to seek to diversify funding streams. Applications were made on a weekly basis to sustain the charity in an everchanging funding environment with 16 application being successful.

Community fund raising was stopped by the lockdown as potential venues/events were cancelled.

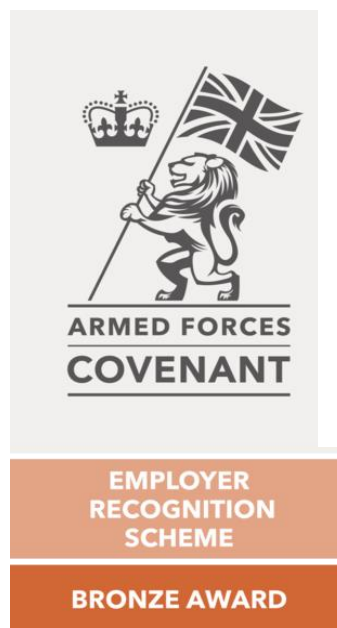
Trustees agreed sponsorship packages to diversify our funding streams. The strategy is to enable potential sponsors to easily commit something

- Applications made to 44 Trusts and Foundations for funding for 2020/21 and 2021/22
- Stage 1 Application to National Lottery Community Fund accepted

tangible and specific. Promote the sponsorship packages to the local business community and grow a corporate database to increase the direct audience we must communicate with. We have created a tier of packages (silver, gold & platinum) that clearly details what an organisation would get for a specific amount donated. The idea is that businesses who might be interested could simply choose the package that best suits their budget and own goals.

Our National Lottery funding was due to end on 31.3.21 and a bid was under preparation for continuing funding. However, the National Lottery suspended this process due to the Covid 19 pandemic. The National Lottery agreed to extend our project by 6 months and provide emergency funding to support this. Applications to bridge the gap in funding to Two Ridings York Small Charities Fund and Independent Age were successful. We are grateful to them and the national Lottery for their support.

A Stage 1 Bid to the National Lottery Community Fund for 5-year continued funding was made in January and accepted in March.



Older Citizens Advocacy York (OCAY)

**Receipts and Payments Accounts
for the year ended
31 March 2021**

Registered Charity No. 1173795

Older Citizens Advocacy York (OCAY)

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1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Use of this report

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

Caroline Cook

Caroline Cook
Independent Examiner

15/07/2021
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Older Citizens Advocacy York (OCAY)

Summary of Receipts and Payments for the year ended 31 March 2021

	Notes	Unrestricted funds £	Designated funds £	Restricted funds £	2021 Total £	2020 Total £
Receipts						
Grant funding	2	13,924	-	97,208	111,132	70,123
Fundraising	3	123	-	-	123	2,905
Donations (inc Gift Aid)	4	8,673	-	3,551	12,224	4,730
Other income		149	-	-	149	-
Bank interest		13	-	-	13	64
Total receipts		22,882	-	100,759	123,641	77,822
Payments						
Staff costs		6,925	-	56,657	63,582	64,288
Staff training		-	-	-	-	199
Staff recruitment and expenses		-	-	-	-	784
Volunteer training		270	-	-	270	41
Volunteer expenses		345	-	44	389	547
Fundraising expenses		(154)	-	-	(154)	487
Property costs		-	-	8,791	8,791	9,344
Insurance		-	-	920	920	899
Telecommunications and IT		-	-	7,074	7,074	6,429
Asset purchases		-	-	1,224	1,224	1,577
Office supplies		-	-	850	850	713
General publicity and advertising		1,093	-	395	1,488	476
Outreach publicity and events		-	-	75	75	2,466
AGM expenses		-	-	-	-	346
Subscriptions		-	-	164	164	206
Bank charges		-	-	69	69	60
Total payments		8,479	-	76,263	84,742	88,862
Cash funds b/fwd at 1 April 2020		28,423	24,120	13,695	66,238	77,278
Net receipts/(payments) in the year		14,403	-	24,496	38,899	(11,040)
Cash funds c/fwd at 31 March 2021		42,826	24,120	38,191	105,137	66,238

Older Citizens Advocacy York (OCA Y)

Statement of Assets and Liabilities at 31 March 2021

	Notes	Total 2021 £	Total 2020 £
Cash funds			
Deposit accounts		27,900	27,887
Current account		77,161	38,164
Petty cash		76	187
Total cash funds at 31 March 2021		105,137	66,238

Represented by funds carried forward

Unrestricted funds:

General funds		42,829	28,423
Designated funds	6	24,120	24,120

Restricted funds:

Big Lottery – Reaching Communities		14,750	-
Financial Inclusion – Benefits programme		(1,750)	-
Asset purchase funds		-	170
Vital York programme		-	1,131
Outreach projects		-	7,324
Charles Hayward Foundation – Benefits programme		2,089	-
Aviva – Dementia and Benefits		1,986	5,070
Two Ridings Community Foundation – Benefits programme		3,780	-
The Charles and Elsie Sykes Trust – Core funding		5,000	-
Independent Age – Core funding		7,583	-
Schroder Charity Trust – Core funding		4,000	-
Common Good Trust		750	-
Total funds at 31 March 2021		105,137	66,238

Other Monetary Assets

The Charity does not have any other Monetary Assets.

Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

Assets retained for the Charity's own use

Insured Assets based on the valuation exercise carried out in December 2020 was £17,516 including computer equipment, publicity related assets, office furniture and equipment.

The accounts were approved and authorised for issue by the Trustees on 15 July 2021 and signed on their behalf by:

Rachel Totton

Sylvia Doughty

Rachel Totton
Chair of Trustees

Sylvia Doughty
Trustee & Secretary

Older Citizens Advocacy York (OCAY)

NOTES TO THE RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2021

1. These accounts have been prepared under the historical cost convention, on a receipts and payments basis, in accordance with Section 133 of the Charities Act 2011 and following the guidance for accounting for smaller charities issued by the Charity Commission.

2. **Grant funding**

	2021 £	2020 £
Unrestricted funds		
Donald Forrester Trust	5,000	-
Training course bursary	3,200	-
Grants less than £3,000	5,724	-
Restricted funds		
Big Lottery – Reaching Communities	40,483	40,500
Big Lottery – Reaching Communities (for 2021/22)	14,750	-
Charles Hayward Foundation – Benefits programme	5,500	-
The Charles & Elsie Sykes Trust – Core funding	5,000	-
Independent Age – Core funding	13,405	-
Schroder Charity Trust – Core funding	4,000	-
Two Ridings Community Foundation – Benefits programme	4,500	-
Two Ridings Community Foundation – Vital York programme	-	9,975
Outreach projects	-	18,807
Aviva - Dementia	-	5,070
Financial Inclusion – Benefits programme	3,750	4,046
Grants less than £3,000	5,820	1,700
	111,132	70,123

Big Lottery – Reaching Communities

Reaching Communities have provided grant funding to contribute to the delivery of the advocacy services delivered by OCAY along with the general management and running of the charity.

Outreach projects

A number of small grants, including Ward Committee funding, have been received to fund Outreach projects in local communities.

3. **Fundraising**

During the year, unfortunately due to Covid-19, the charity was not able to partake in the fundraising events that it would usually hold. It is hope that in the coming year and beyond, these fundraising activities can recommence.

4. **Donations**

Donations (including Gift Aid) totalling £12,224 (2020 - £4,730) were received during the year. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who donated to the charity.

Older Citizens Advocacy York (OCAY)

NOTES TO THE RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2021 (continued)

5. Designated funds

At the year end, the following two designated funds were held by the charity:

	2021 £	2020 £
Contingency fund	15,000	15,000
Lord Mayor of York – funding for 2021/22	9,120	9,120
Outreach projects	24,120	24,120

Contingency fund

The Trustees have agreed to hold £15,000 in designated funds against contingencies such as staff redundancies, early office lease termination or any other unforeseen emergencies.

Lord Mayor of York – funding for 2019-2021

In 2016/17, OCAY was one of the nominated charities of the year for the Lord Mayor of York; with £15,988 being raised. The Trustees opted to designate these funds to be spent on the general running costs of the charity during the 2019/20 and 2020/21 financial years, when the grant funding received from the Reaching Communities project decreases. It was strongly expected that all of these funds would be spent by March 2021, however due to OCAY being in the fortunate position whereby it was able to receive additional funding to help it through the Covid-19 impacted year, these funds have not yet been spent. These funds are now very much expected to be spent in the 6 months to 30 September 2021 to cover the forecasted funding shortfall in this period.

Older Citizens Advocacy York (OCAY)

**Receipts and Payments Accounts
for the year ended
31 March 2021**

Registered Charity No. 1173795

Older Citizens Advocacy York (OCAY)

Independent Examiner's Report to the Trustees of Older Citizens Advocacy York

I report to the trustees on my examination of the accounts of Older Citizens Advocacy York (the Charity) for the year ended 31 March 2021.

Responsibilities and basis of report

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Use of this report

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

Caroline Cook

Caroline Cook
Independent Examiner

15/07/2021
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Older Citizens Advocacy York (OCAY)

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Older Citizens Advocacy York (OCAY)

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