

**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 30<sup>th</sup> 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 Honorary Vice President	Professor Dianne Willcocks 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 role 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:

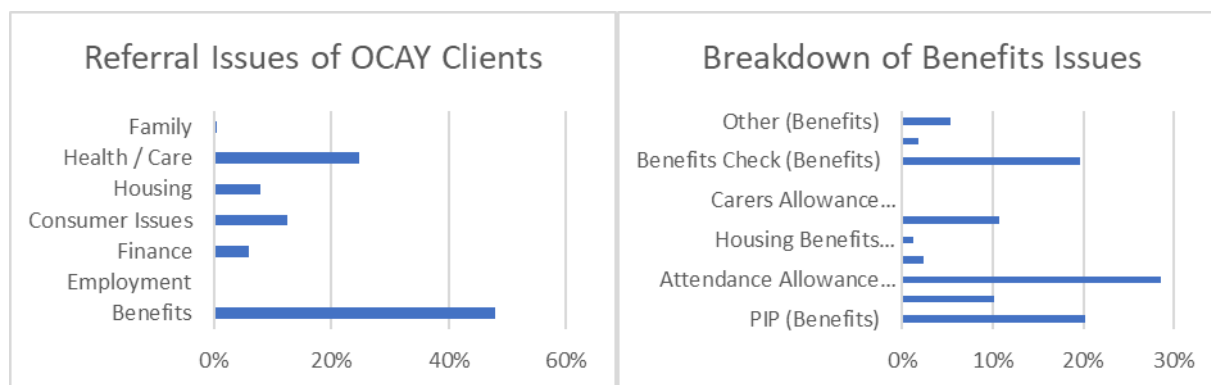
- 89 cases (last year 137 cases) were signposted to another supporting organisation (such as Age UK, Christians Against Poverty and York Mind)
- 76 cases (last year 56 cases) were ongoing at the end of the year
- we closed 303 cases in the year (270 last year).

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 12<sup>th</sup> 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

		Unrestricted funds	Designated funds	Restricted funds	1 Oct 2023 to 30 Sept 2024 Total £	1 Oct 2022 to 30 Sept 2023 Total £
	Note	£	£	£		
<b>Receipts</b>						
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
<b>Total receipts</b>		<b>5,578</b>	<b>0</b>	<b>79,726</b>	<b>85,304</b>	<b>123,112</b>
<b>Payments</b>						
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
<b>Total payments</b>		<b>33,460</b>	<b>0</b>	<b>93,369</b>	<b>126,829</b>	<b>93,483</b>
<b>Cash funds b/fwd at 1 Oct 2023</b>		<b>76,554</b>	<b>18,000</b>	<b>16,140</b>	<b>110,694</b>	<b>81,065</b>
<b>Net receipts/(payments) in the period</b>		<b>(27,883)</b>	<b>0</b>	<b>(13,643)</b>	<b>(41,526)</b>	<b>29,630</b>
<b>Funds transfers</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Cash funds c/fwd at 30 September 2024</b>		<b>48,671</b>	<b>18,000</b>	<b>2,497</b>	<b>69,168</b>	<b>110,695</b>

## Older Citizens Advocacy York (OCAY)

### Statement of Assets and Liabilities at 30 September 2024

	Total	Total
	30 September 2024	30 September 2023
	Notes £	£
<b>Cash funds</b>		
Deposit account	66,311	86,645
Current account	2,803	24,010
Petty cash	54	39
<b>Total cash funds at period end</b>	<b>69,168</b>	<b>110,695</b>
<b>Represented by funds carried forward</b>		
<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
<b>Total funds at period end</b>	<b>69,168</b>	<b>110,695</b>

#### 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 23<sup>rd</sup> 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
	£	£
<b>Unrestricted funds</b>		
Grants less than £3,000	200	0
	<hr/> 200	<hr/> 0
<b>Restricted funds</b>		
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
<b>Total designated funds</b>	<b>18,000</b>	<b>18,000</b>

#### 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.