

**Older Citizens Advocacy York (OCAY)**

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

**Registered Charity No. 1173795**

# Older Citizens Advocacy York (OCAY)

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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 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

17<sup>th</sup> 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 12<sup>th</sup> 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 (OCAY)

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

		Unrestricted funds	Designated funds	Restricted funds	1 Oct 2024 to 30 Sept 2025	1 Oct 2023 to 30 Sept 2024
	Note	£ £		£	Total £	Total £
<b>Receipts</b>						
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
<b>Total receipts</b>		<b>3,991</b>	<b>0</b>	<b>104,036</b>	<b>108,027</b>	<b>85,304</b>
<b>Payments</b>						
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
<b>Total payments</b>		<b>36,755</b>	<b>0</b>	<b>87,367</b>	<b>124,122</b>	<b>126,829</b>
<b>Cash funds b/fwd at 1 Oct</b>		<b>48,670</b>	<b>18,000</b>	<b>2,498</b>	<b>69,168</b>	<b>110,694</b>
<b>Net receipts/(payments) in the period</b>		<b>(32,764)</b>	<b>0</b>	<b>16,669</b>	<b>(16,096)</b>	<b>(41,526)</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>15,906</b>	<b>18,000</b>	<b>19,166</b>	<b>53,072</b>	<b>69,168</b>

# Older Citizens Advocacy York (OCAY)

## Statement of Assets & Liabilities at 30 September 2025

	Total 30 September 2025	Total 30 September 2024
	Notes £	£
<b>Cash funds</b>		
Deposit account	42,273	66,311
Current account	10,736	2,803
Petty cash	64	54
<b>Total cash funds at period end</b>	<b>53,073</b>	<b>69,168</b>
<b>Represented by funds carried forward</b>		
<u>Unrestricted funds:</u>		
General funds	15,906	48,671
Designated funds	<b>5</b> 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
<b>Total funds at period end</b>	<b>53,072</b>	<b>69,168</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 *17<sup>th</sup> 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

- 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.

- Grant funding**

	year ending 30 September 2025	year ending 30 September 2024
	£	£
<b>Unrestricted funds</b>		
Grants less than £3,000	0	200
	0	200
<b>Restricted funds</b>		
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
	104,036	79,726

#### 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.

- Fundraising**

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

- 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 (OCAY)

### 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
<b>Total designated funds</b>	<b>18,000</b>	<b>18,000</b>

#### 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.