

Trustees' Annual Report for the period

From		Period start date			To			Period end date		
		25 th	Nov	2022				5 th	April	2024

Section A Reference and administration details

Charity name Upper Eden Linking Lives

Other names charity is known by

Registered charity number (if any) 1201147

Charity's principal address Winton United Church

Kirkby Stephen

Cumbria

Postcode

CA174HS

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Ashley Liston	Chair		
2	Stephen Radford	Safeguarding lead		
3	Hannah Fox			
4	Ray Pinniger			
5	Nick Morley			
6				
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12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Treasurer	Janet Hartley	
Accounts scrutineer	Paul Sanderson	
Safeguarding Support	Sue Davis/31:8	

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

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution (2 nd August 2022)
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	Invited and appointed by existing trustee group.

Additional governance issues (Optional information)

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

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

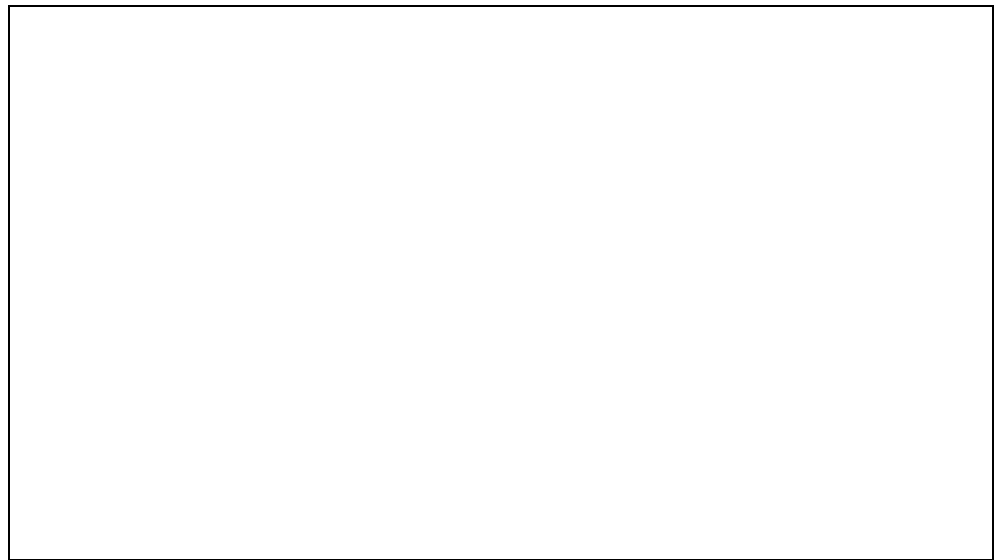
The charity was formed in Nov 2022 with the support of the national charity Linking Lives UK but with a local steering group helping to shape its development over the following year. All trustees were appointed in line with The Charity Commission recommendations. We chose to form a new charity as none of the local churches felt able to adopt us under their charitable status. This has required us to establish our own policies and procedures but has allowed us to be focused on the charitable objectives of our scheme as it seeks to address the problem of loneliness in our community.

A key priority has been to ensure that our scheme has high standards of safeguarding in its operation. To this end we have appointed a trustee to oversee safeguarding, have engaged with 31:8 to provide safeguarding advice and training and adopted safeguarding procedures aligned with local guidance. All potential volunteers are required to provide two references, undergo DBS checking, have a one-to-one interview, take part in safeguarding training and will have regular ongoing supervision

Key policies include;

- Safeguarding (including Adult Safeguarding policy, Incident, Accident and Action reporting)
- Data Protection
- Equal Opportunities
- Lone Working
- Disciplinary and Grievance

We continue to operate with the support and oversight of Linking Lives UK, Thirtyone:Eight Safeguarding Support and in collaboration with other Linking Lives schemes in Cumbria.



Section C Objectives and activities

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

The promotion of social inclusion for the public benefit amongst persons who are excluded from society because they are housebound for any reasons, but in particular those who are elderly and in poor physical or mental health, assisting them to integrate into society through the provision of one to one befriending, and through promoting initiatives which promote social inclusion.

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

- Devise constitution for Upper Eden Linking Lives (August 2022)
- Registration with Charity Commission (Nov 2022).
- Recruit trustees in accordance with Charity Commission guidelines.
- Appoint treasurer and scrutineer.
- Initiate regular trustee meetings.
- Develop policies and procedures.
- Engage in fundraising activity.
- Recruitment and appointment of coordinator.
- Induction and training of coordinator.
- Recruitment and training of volunteers.
- Fulfil all required safeguarding procedures.
- Matching Scheme Friends with volunteers.
- Ongoing monitoring and support for volunteers and Scheme Friends

Additional details of objectives and activities (Optional information)

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

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

This is our first annual report since forming as a new charity in Nov 2022. A local steering group had been formed which was composed of representatives from local churches, community groups, local government and the health and care sector. Three other Linking Lives schemes were already in operation in Cumbria with the nearest group being in Penrith. The decision was made to focus this new scheme on the area of Upper Eden (Kirkby Stephen, Appleby and the surrounding villages).

Key milestones;

- Nov 2022 Registration with Charity Commission.
- Establish team of trustees with regular meetings.
- Fundraising to launch the scheme and employ coordinator.
- Summer 2023 fundraising target reached.
- Autumn 2023 coordinator recruitment and appointment.
- Winter 2023/Spring 2024 Coordinator induction and training.
- Spring 2023 Volunteer recruitment and training

We worked closely with the 'Living Well Coaches' based at the two local GP surgeries as we sought to identify people who might benefit from our scheme. Our aim was to have a 'soft and safe launch' with referrals being appropriate for our scheme. The publicity in the early stage was mainly focused on recruiting volunteers who then underwent training which had been adapted and refined by our scheme coordinator.

To date we have managed to recruit and match ten 'scheme friends' with volunteers with very positive feedback. Looking ahead, our priority is to step up our publicity seeking to recruit more volunteers and raise the profile of Upper Eden Linking Lives in the community. Our objective is to have twenty Scheme Friends matched with volunteers by the end of 2024.

Section E

Financial review

Brief statement of the charity's policy on reserves

Upper Eden Linking Lives has only one bank account which is with Unity Trust Bank. The surplus at the year end is due to the fact that our coordinator was appointed in Sept 2023 with monthly salary costs only applying for seven months of the year. This surplus compared to the annual budget will be held in reserve to cover potential redundancy costs in year two and beyond although this is most unlikely as we have secured funding to cover budgeted costs for the next three years.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

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

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

We have been extremely grateful for the funding support received mainly from local charitable organisations including;

- Cumbria Community Foundation (primarily Out of Eden, Westmorland Family Community Fund and Eden Rural Community Fund)
- Freida Scott
- Hadfield Trust
- Cumbria County Council

This funding has allowed us to recruit a scheme coordinator and cover costs for our first year of operation. We were delighted to have been successful in receiving a commitment to funding for the next three years from TNL Community Fund which will cover our current levels of annual spending.

Section F

Other optional information

Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Ashley Liston

Position (eg Secretary, Chair, etc)

Chair of Trustees

Date

11th November 2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Upper Eden Linking Lives

No (if any)

Receipts and payments accounts

CC16a

For the period from	Period start date 25th Nov 2022	To	Period end date 5th April 2024
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Methodist District (January)	500	-	-	500	-
Cumbria Community Foundation	7,000	-	-	7,000	-
Hadfield. Cumbria Community Council	5,273	-	-	5,273	-
Freida Scott	4,000	-	-	4,000	-
W+F Council (Household Relief Fund)	1,500	-	-	1,500	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	18,273	-	-	18,273	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	18,273	-	-	18,273	-
A3 Payments					
Coordinator salary	4,983	-	-	4,983	-
HMRC	128	-	-	128	-
DBS	294	-	-	294	-
31:08:00	318	-	-	318	-
Public liability Insurance	157	-	-	157	-
Bank charges	54	-	-	54	-
Laptop	829	-	-	829	-
Printer	329	-	-	329	-
Publicity and printing	146	-	-	146	-
0800 World Telecom	41	-	-	41	-
Venue cost	12	-	-	12	-
Sub total	7,291	-	-	7,291	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	7,291	-	-	7,291	-
Net of receipts/(payments)	10,982	-	-	10,982	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	10,982	-	-	10,982	-

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Unity Trust Bank Account	10,730	-	-
		-	-	-
		-	-	-
	Total cash funds	10,730	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	