

Trustees' Annual Report for the period

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|------|-------------------|-------|------|----|-----------------|-------|------|
| From | Period start date | | | To | Period end date | | |
| | 6 th | April | 2024 | | 5 th | April | 2025 |

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 | | | |
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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 | Ashley Liston | |
| Accounts scrutineer | Paul Sanderson | |
| Safeguarding trustee | Stephen Radford | |
| | | |

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

These have all been updated during the past year

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)

- Promotion and publicity of the scheme
- Develop connections with local community organisations
- Working with link workers based at GP surgeries
- Recruitment and training of volunteers.
- Fulfil all required safeguarding procedures.
- Matching Scheme Friends with volunteers.
- Ongoing monitoring and support for volunteers and Scheme Friends
- Arrange fortnightly meetings between coordinator and manager
- Arrange quarterly trustee meetings
- Arrange and attend quarterly meetings with Cumbria LL schemes
- Recruiting assistant coordinator (Nov/Dec 2025)

Additional details of objectives and activities (Optional information)

We are pleased to have been chosen by Westmorland and Furness Council as one of their trusted organisations to receive the Household Support Fund. This was distributed to households of clients of our scheme as well as those of the local Food Bank with whom we work closely.

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

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

Linking Lives UK is a national Christian charity that supports the setting up and development of befriending schemes across the UK. At its heart is the connection between local, volunteer befrienders and people who are experiencing loneliness and/or social isolation by means of a weekly visit. These are usually face to face but can be online or over the phone.

The Upper Eden Linking Lives scheme was launched in early 2024 after a process of community consultation and fundraising, followed by the recruitment of a coordinator who was appointed in September 2023. The first cohort of volunteers was trained in Jan/Feb 2024 and allocated to individuals who were referred to us primarily via the Social Prescribing Link Workers based at the local GP surgeries. Since this time, we have had a steady, albeit slow rise in numbers of volunteers and referrals which has enabled us to develop the 'soft and safe' launch that we had hoped for.

As of November 2025, we have been able to match 26 'scheme friends' with volunteers although numbers have fluctuated due to people moving away, moving into care and, sadly, also through death. We recognise the significant time commitment in monitoring and supporting individuals through regular calls and emails as well as in the recruitment of volunteers which involves interviews, processing references and DBS checks, and training. Alongside this has been the challenge of covering a large geographical area which includes the towns of Appleby and Kirkby Stephen as well as the surrounding villages demanding significant travel time for our coordinator.

Safeguarding has been a key consideration in the set up and oversight of our scheme. Our coordinator is responsible for the day-to-day management which includes obtaining references, processing DBS checks and carrying out interviews. One of our trustees provides oversight for our coordinator and we have subscribed to the organisation 31:8 to provide expert advice and support including processing DBS and providing training. During the year we have had no significant events to report but have reflected on some of the challenges and complex situations where risk was identified.

During the past year we have developed many community connections and earned a good reputation which has been reflected by the fact that we were identified by Westmorland and Furness Council as one of their trusted organisations to receive Household Support Funding in 2023/24 and 2025/26. We have good links with the local food bank, churches and dementia groups, and have used social media, leaflets and posters to promote our service. Word of mouth has perhaps been our most valuable resource. We have also maintained good links with the other three schemes in Cumbria (Cockermouth, Keswick and Penrith), holding three monthly online meetings where we share progress and challenges, and support and encourage one another. We have been encouraged to hear that two new schemes are in the process of forming (Kendal and Brampton) who are being supported by members of the other Cumbrian schemes.

We are very aware of the potential for our scheme to be one of the many community assets that can benefit the wellbeing of people living in the area. We have been seen as a valuable resource by the social prescribing link workers based at the GP surgeries but realise that other healthcare workers in the area will have contact with lonely people who might benefit from our scheme. We have maintained our links with the Cumbria Council for Voluntary Services and are conscious that the

development of Integrated Neighbourhood Teams may open opportunities for us to be more visible and effective in our work.

Following a period of launch in 2024, we have seen the last year as being a time of consolidation, ensuring that all our processes, policies and procedures are fully up to date and that we are operating safely. We see the next year as being one where we will 'step up a gear' in our recruitment of volunteers and receiving increased referrals, using our reputation, connections and the opportunities presented within the local community.

The most immediate project is to recruit an Assistant Coordinator to work alongside our existing coordinator who has been with us since Sept 2023. She has asked if she can reduce her hours from 15 to 10hrs/wk due to family commitments. Our plan is to recruit an assistant who can work alongside her for 5-6hrs/week, initially in a supervised role but working towards a job share arrangement. This small team will be mutually supportive, allow appropriate sharing of duties and provide us with resilience for the future. We are also looking to support our team of trustees who meet every three months, providing us with advice, support and accountability. Sadly, we lost our treasurer who died at the end of 2024 with our Chair of Trustees taking on this role as a temporary measure. Our aim is to recruit two more trustees during the next year, one of whom can take on the role of treasurer.

We have been enormously grateful to the National Lottery Community Fund who provided us with three-year funding, which started in September 2024 with the final payment due to be received in March 2027. This has allowed us to concentrate on the work of the scheme without being preoccupied with funding applications and reporting. The six-monthly grant payments have covered our running costs although we were hit by the reduction in threshold for the employers NI contribution which has increased these payments from £7 to £70. We may need to address a modest shortfall in our funding with some additional funding application, needing to ensure we retain adequate reserves as required by the Charity Commission.

Objectives for the next year

- Further develop connections with health and care teams across Upper Eden
- Develop our publicity using social media, posters, leaflets and the local press
- Increase our cumulative total of matches from 26 to 50 (Oct 2026)
- Increase active matches by 50% (Oct 2026)
- Recruit an assistant coordinator (Jan 2026)
- Recruit two new trustees (March 2026)
- Recruit a treasurer (March 2026)
- Support the development of new schemes in Brampton (Carlisle) and Kendal

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 subsequent years although this is most unlikely as we have secured funding to cover budgeted costs for the 2024-2027.

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 seen a significant increase in payments for employers NI (from £7 to £70) due to the reduction in thresholds in the 2025 budget.

We were delighted to have been successful in receiving a commitment to funding for 2024-27 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)

Date

11th November 2025



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Upper Eden Linking Lives

No (if any)
1201147

CC16a

Receipts and payments accounts

| | | | |
|------------------------|-------------------------------------|----|-----------------------------------|
| For the period from | Period start date 6th April 2024 | To | Period end date 5th April 2025 |
|------------------------|-------------------------------------|----|-----------------------------------|

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 | | | | | |
| TNL Community Fund | 16 602 | - | - | 16 602 | - |
| Rotary Club Appleby | 100 | - | - | 100 | - |
| W+F Council (Household Support Fund) | 2 500 | - | - | 2 500 | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total (Gross income for AR) | 19 202 | - | - | 19 202 | - |
| A2 Asset and investment sales, (see table). | | | | | |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | - | - | - | - | - |
| Total receipts | 19 202 | - | - | 19 202 | - |
| A3 Payments | | | | | |
| Coordinators salary | 9 189 | - | - | 9 189 | - |
| HMRC | 652 | - | - | 652 | - |
| DBS | 329 | - | - | 329 | - |
| 31:8 safeguarding support | 57 | - | - | 57 | - |
| Public liability insurance | 157 | - | - | 157 | - |
| Bank charges | 65 | - | - | 65 | - |
| Publicity and printing | 250 | - | - | 250 | - |
| 0800 World Telecom | 218 | - | - | 218 | - |
| Return HSF 2023-24 | 1 350 | - | - | 1 350 | - |
| Payments HSF 2024-25 | 2 500 | - | - | 2 500 | - |
| Catering volunteers | 33 | - | - | 33 | - |
| Linking Lives UK subscription | 200 | - | - | 200 | - |
| Sub total | 15 000 | - | - | 15 000 | - |
| A4 Asset and investment purchases, (see table) | | | | | |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | - | - | - | - | - |
| Total payments | 15 000 | - | - | 15 000 | - |
| Net of receipts/(payments) | 4 202 | - | - | 4 202 | - |
| A5 Transfers between funds | - | - | - | - | - |
| A6 Cash funds last year end | 10 729 | - | - | 10 729 | - |
| Cash funds this year end | 14 931 | - | - | 14 931 | - |

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 | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | Total cash funds | - | - | - |
| | (agree balances with receipts and payments account(s)) | Agreement Error | OK | OK |
| | | Unrestricted funds to nearest £ | Restricted funds to nearest £ | Endowment funds to nearest £ |
| B2 Other monetary assets | Details | | | |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| B3 Investment assets | Details | | | |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| B4 Assets retained for the charity's own use | Details | | | |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
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| | | | - | - |
| B5 Liabilities | Details | | | |
| | | | - | |
| | | | - | |
| | | | - | |
| | | | - | |
| Signed by one or two trustees on behalf of all the trustees | Signature | Print Name | Date of approval | |
| | | | | |