

# AGE CONCERN ULVERSTON AND DISTRICT

England & Wales · Charity number 515821

## Details

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**Status** Registered

**Legal form** Other

**Registered** 1984-11-22

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

## Contact

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**Address** Age Concern  
Central Auction Galleries  
Brogden Street  
Ulverston  
Cumbria  
LA12 7AH

**Phone** 01229586968

**Email** [lyndamiddlehurst@btconnect.com](mailto:lyndamiddlehurst@btconnect.com)

## Activities

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**Objects:** TO PROMOTE THE RELIEF OF ELDERLY PEOPLE IN ANY MANNER WHICH NOW IS OR HEREINAFTER MAY BE DEEMED BY LAW TO BE CHARITABLE IN AND AROUND ULVERSTON AND DISTRICT (THE AREA OF BENEFIT)

**Activities:** General care of the elderly  
Subsidised Pop-in-Parlour  
Free Wheelchair loan  
Subsidised day trips  
Free Xmas party

## Classification

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- **How:** Provides Buildings/facilities/open Space
- **What:** General Charitable Purposes, Recreation, Other Charitable Purposes
- **Who:** Elderly/old People

## Geography

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- **Area of benefit:** ULVERSTON AND DISTRICT
- Cumbria

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£29,679	£20,101	-	-
2024-03-31	£19,102	£17,857	-	-
2023-03-31	£16,376	£17,887	-	-
2022-03-31	£17,447	£17,447	-	-
2021-03-31	£25,565	£12,679	-	-

## Trustees

Name	Role	Appointed
MARGARET GIFFORD		2012-01-26
Moira Maile		2015-04-05

**AGE CONCERN ULVERSTON AND DISTRICT**

England & Wales - Charity number 515821

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# Accounts

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## General Information for the Business

Address	Age Concern Ulverston & District The Central Auction Galleries Brogden Street Ulverston LA12 7AH
Charity Number	515821
Accountants	Melville & Co Chartered Accountants Units 17-18 Trinity Enterprise Centre Ironworks Road Barrow In Furness Cumbria LA14 2PN

## Age Concern Ulverston & District

### Income and Expenditure Account for the year ended 31st March 2025

<u>Income</u>	<u>£</u>	<u>Expenditure</u>	<u>£</u>
Shop Sales	11,215.30	Rent	9,500.04
Pop in Parlour	7,010.33	Rates	65.00
Less: costs	(2,202.00)	Water Rates	372.78
<u>Sundry Income</u>		Postage & Stationery	47.18
Grants received	-	Travel Costs	690.00
Donations Received	733.20	Telephone	930.58
CAF	-	Electricity/Gas	3,153.54
Fundraising Income	192.05	Cleaning	2,200.27
Coach Receipts	390.00	Waste Removal	-
Misc Income	125.12	Professional Fees	456.00
Rent Received	10,400.00	Insurance	441.21
Dividend Income	1,494.42	Christmas Party costs	650.00
Bank Interest	320.49	Sundry Expenditure	196.15
		Repairs and Renewals	774.11
		Capital equip.	-
		Donations Made	623.70
		Surplus for the Year	9,578.35
	<u>29,678.91</u>		<u>29,678.91</u>

### Movement of Funds for the year

<b>Opening Balances Brought Forward</b>		<b>Represented by Balances Carried Forward</b>	
Bonds	40,000.00	Bonds	40,000.00
Reserve Account	20,925.27	Reserve Account	22,740.18
Current Account	22,443.56	Current Account	30,154.20
Cash in Hand	568.52	Cash in Hand	630.31
Petty Cash	98.73	Petty Cash	89.74
		Surplus for the year	(9,578.35)
Total	<u>84,036.08</u>		<u>84,036.08</u>

I approve the financial statements attached, and confirm that I have made all relevant records and information available to enable these financial statements to be produced.

Signed:



Date:

21. 11. 2025

**Mrs L Middlehurst**  
**Age Concern Ulverston & District - Charity No. 515821**

## Age Concern Ulverston & District

### Independent Examiners Statement

I report of the accounts of Ulverston and District Age Concern for the year ended 31 March 2025, set out on the attached page.

#### Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act
- to follow the procedures laid down in the general Directions given by the commission under section 145(5)(b) of the 2011 Act
- to state whether particular matters have come to my attention

#### Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the next statement.

#### Independent examiner's statement

In connection with my examination, no matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with section 130 of the 2011 Act and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act have not been met or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



S Oram FCCA  
Melville & Co  
Unit 17-18 Trinity Enterprise Centre  
Ironworks Road  
Barrow-in-Furness  
LA14 2PN

Date: 21-11-2025

**AGE CONCERN ULVERSTON AND DISTRICT**

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# Accounts

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# Trustees' Annual Report for the period

<b>From</b>	Period start date			<b>To</b>	Period end date		
	01.	04	2020		31	03	2021

## Section A Reference and administration details

**Charity name** Age Concern Ulverston and District

**Other names charity is known by** N/A

**Registered charity number (if any)** 515821

**Charity's principal address**  
 Central Auction Galleries  
 Brogden Street  
 Ulverston  
**Postcode** LA12 7AH

### 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	Lynda Middlehurst	Chair		
2	Margaret Gifford	Vice chair		
3	Moira Maile	Treasurer		
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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

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### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

### 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
How the charity is constituted (eg. trust, association, company)	A committee of trustees runs the Charity, with a Chair, Vice Chair and Treasurer elected annually. Our accounts are audited by a local firm of accountants and an A.G.M. is held in the summer of each year.
Trustee selection methods (eg. appointed by, elected by)	Annual general meeting

### 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.

<p>Trustees are trained in situ. We work with other members of the community as much as possible, giving out community information and signposting people to other organisations.</p>
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## Section C Objectives and activities

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

We aim to promote the health and wellbeing of older people in Ulverston and surrounds and engage with the wider community raising funds through our charity shop and café.

**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)**

We run a retail business selling good quality second hand items such as clothes, bric a brac, books etc. to raise funds which are then used for the benefit of the elderly in our area.

We have a pop-in café area within the premises which operates at minimum cost to customers. We offer hot drinks and light snacks. This café is a real social hub which offers an opportunity for people to come and chat to friends and meet new ones. It is especially useful for those who may live alone, including single older men who often find it difficult to socialise outside of the home in other environments.

Our normal activities include running approximately four subsidised coach trips every year which continue to prove very popular. We listen to suggestions as to where people might like to visit and then review how the trip went.

We make an donation of a book token to our local high school which is given at the annual prizegiving to a student who intends to pursue a career in social care.

We hold a free Christmas party annually for approximately 100 people in a local church hall. It includes a buffet, entertainment and a raffle.

**Additional details of objectives and activities (Optional information)**

Our activities are all undertaken by volunteers who offer their time and skills totally for free.

We also signpost people to the relevant organisations and government bodies to obtain advice and help.

We have two wheelchairs which we loan out for short periods to people. This is a free service, we just ask for a donation if possible. It is particularly useful for people who have just been discharged from hospital after an operation or are recovering from a fall.

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

Unfortunately, our achievements have been greatly reduced from the beginning of 2020 onwards because of the pandemic. Our social activities virtually ceased but we kept the shop and café open when allowed by law. We tried to ensure that we kept in touch with vulnerable people when possible. We hope to return to something like normality for the coming year 2022-2023.

## Section E

## Financial review

**Brief statement of the charity's policy on reserves**

We have a small amount of reserves invested in National Savings and Investments for emergencies

**Details of any funds materially in deficit**

N/A

**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.

Funds are mainly raised through retail sales.

We receive small donations from certain local organisations.

A local business annually donates Christmas fayre e.g. cakes, chocolates, mince pies etc, which we then distribute for free to the older people.

Our expenditure is mainly limited to essentials such as utilities etc. Many of our purchases may be second-hand e.g. unwanted shopfittings from another shop closing down.

**Section F Other optional information**

Empty box for optional information.

**Section G Declaration**

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

Signed on behalf of the charity's trustees

<b>Signature(s)</b>	Lynda Middlehurst	
<b>Full name(s)</b>	Lynda Middlehurst	
<b>Position (eg Secretary, Chair, etc)</b>	Chair	
<b>Date</b>	24.01.2022	