

REGISTERED COMPANY NUMBER: 08224619 (England and Wales)
REGISTERED CHARITY NUMBER: 1149975

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023
FOR
AGE UK BARROW AND DISTRICT LIMITED**

R F Miller & Co
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LA12 7AD

AGE UK BARROW AND DISTRICT LIMITED

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FOR THE YEAR ENDED 31 MARCH 2023**

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ANNUAL REPORT AND FINANCIAL STATEMENT FOR THE YEAR ENDING 31ST MARCH 2023



Charity Number
1149975

A MESSAGE FROM THE CHAIRMAN OF THE BOARD OF TRUSTEES

MARTIN PETTIFOR

Over the last 5 years Age UK Barrow has been on a journey of financial recovery, improving from looking unlikely to survive a further 18 months, to a position where we are financially stable and able to expand the outstanding services that we deliver.

I am delighted that in 2022/23 we made substantial progress, reducing our loss to £9,000 and within touching distance of covering our costs for the first time in several years. Doing so is critical, not because we need to pay shareholders dividends or our staff exorbitant salaries or bonuses – we certainly don't do that! - but because it allows us to focus on our mission of helping the elderly in Barrow, Dalton & Askam live healthy, active, and independent lives.



The excellent performance in '22/'23 was entirely due to our outstanding staff. Under Vickie's leadership, with Helen, Marie and Carolyn providing the critical glue and support behind the scenes, our team turns up to work every day determined to make the lives of the service users they meet that little bit better. Their efforts don't always get the recognition they deserve, and I am delighted that for the first time in several years we were able to give them a (modest) pay rise.

Once again this annual report is full of stories of how the services we provide for free touch people's lives for the better. The £1m+ of unclaimed and backdated benefits that Marie, Joshua, Becca, and Bryony in our Information & Advice team secure every year can be a life changer for some of the most vulnerable members of our community. The social contact that Jackie and Lorna provides people living with Dementia and the practical skills of our handyman David is every bit as valuable to the people we support.

Our charity shop beside Barrow Football Club is the rock on which everything we do is built, generating funds to allow Lorna, Steve, and Bryony to deliver a packed diary of social activities to help people get out their homes, make new friends, and live fuller, more enjoyable lives. Under Sue and Mark's leadership our shop has been transformed from loss-making to what a recent senior Age UK visitor described as one of the best in the region.

The life blood of Age UK Barrow is undoubtedly our volunteers. For every member of staff there are 5 volunteers; without them we simply couldn't keep our shop open or deliver all our social activities. They will be the first to say they get as much out of volunteering as they give, but I am delighted that we have been able to continue holding our annual awards event to recognise their outstanding contribution.

Finally, I would like to thank our sister charity, Age UK Lancashire, and above all their CEO Teri for the invaluable support they provide. With the support of my 3 fellow trustees, who give so freely of their time, I am proud and honoured to guide Age UK Barrow & Districts as it continues to help people in later life locally live healthy, active, and independent.

Martin Pettifor

Chairman of the Board of Trustees

A MESSAGE FROM THE HEAD OF AGE UK BARROW & DISTRICT

Looking back at the past year whilst writing this report, I have a great sense of pride. Being able to lead such a committed and passionate team is something I feel very privileged to do. Hearing our customer stories first hand and seeing the improvement in their in their wellbeing makes me and the team feel that, despite the challenges and tough times, we are delivering such worthwhile services to the older people in our community. We are making a real difference to peoples lives.

It has been another fantastic year for Age UK Barrow and District . We have seen our social groups and activities grow in numbers and popularity and it has been so wonderful to see and hear people enjoying themselves whilst improving their physical and mental health.

We have been involved in some great community events such as the Community Street Party to celebrate the Queens Platinum Jubilee and were thrilled to support this years Pride festival.

Once again we hosted the annual Silver Sunday in conjunction with the Forum in Barrow. The event was our biggest yet and we were joined by some familiar faces as well as welcoming lots of new new ones. The day was a great success with lots of laughter, plenty of singing and of course, dancing!

We have seen a significant increase in demand for our Information and Advice services following the cost of living and energy crisis and have been overwhelmed with the amount of older people needing our help and support to manage their income and expenditure. Fortunately we have a very skilled and knowledgeable Information and Advice team who have been on hand to give advice and assist people with benefit claims which has resulted in a staggering £1,278,470 in unclaimed and backdated benefits being awarded to people living in Barrow, Dalton & Askam.

Increasing peoples weekly income has enhanced their day to day living in so many ways. People are able to adequately heat their homes, follow a more nutritious diet and attend social activities helping to combat the affects of loneliness and isolation.

I would like to take this opportunity to thank the whole team at Age UK Barrow and District for their continued hard work, commitment and dedication in supporting our clients, volunteers and myself in my role as Head of Age UK Barrow & District.

My plan for the coming financial year is to focus on new business growth and development whilst working towards our strategic targets and goals.

I am pleased to be able to report on Age UK Barrow & Districts' achievements and service provision for 2022 - 2023.

V Martin

Vickie Martin
Head of Age UK Barrow & District



VICKIE MARTIN
HEAD OF AGE UK BARROW

WHO ARE WE AND WHO DO WE SERVE?

Age UK Barrow and District is a charity limited by guarantee. Our charity number is 1149975 (Company number 8224619).

Our governing document is our Articles of Association, which were reviewed, updated and adopted in September 2012.

Age UK Barrow provides a range of high-quality services across Barrow & District delivering information, advice and support services to older people, our customers are aged over 50.



We make a huge difference to our customers and their carers, positively impacting on their quality of life and independence.

Age UK Barrow and District continue to recognise the benefits of being a Brand Partner to Age UK and our network of charities. Although an independent charity, Age UK Barrow continues to work closely with Age UK, broadly aligning our strategic aims and objectives and working closely with them





OUR VISION

FOR LOCAL PEOPLE IN LATER LIFE TO FEEL SAFE, RESPECTED, AND TO HAVE CHOICE AND OPPORTUNITIES TO LEAD A LIFE THAT IS ENJOYABLE, MEANINGFUL AND SUITED TO THEIR INDIVIDUAL ASPIRATIONS

OUR MISSION

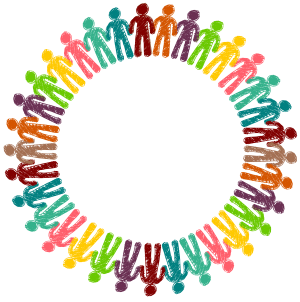
- WE WILL WORK TOGETHER WITH PEOPLE IN LATER YEARS TO OFFER SERVICES, SUPPORT AND EDUCATION, TO HELP THEM LIVE HEALTHY, SOCIALLY ACTIVE AND INDEPENDENT LIVES.
- OUR SERVICES AND ACTIVITIES WILL BE AVAILABLE THROUGHOUT THE LOCAL COMMUNITY AND ARE PROVIDED EITHER FREE OF CHARGE OR AT THE LOWEST REASONABLE PRICE.
- WE WILL CAMPAIGN PASSIONATELY TO REMOVE AGE AS A BARRIER TO OPPORTUNITY IN BARROW AND DISTRICT.

OUR VALUES

- WE ARE PROUD TO WORK HERE – WE VALUE AGE UK BARROW AND DISTRICT, ITS ROLE IN MAKING A POSITIVE DIFFERENCE AND ARE PROUD OF OUR ABILITY TO MAKE AN IMPACT THROUGH OUR WORK AND IN OUR COMMUNITIES
- WE CARE – WE ARE INCLUSIVE, WE SUPPORT EACH OTHER, TREAT EVERYONE WITH RESPECT, ARE ACCESSIBLE AND LISTEN & ACT IN THE BEST INTERESTS OF ALL
- WE GO ABOVE & BEYOND – EXCELLENCE IS THE NORM, WE ARE ONLY SATISFIED WHEN WE DO OUR BEST, WE STRIVE TO GO ABOVE AND BEYOND IN ALL THAT WE DO
- WE TAKE RESPONSIBILITY – WE VALUE AND RESPECT INDIVIDUAL AND TEAM CONTRIBUTION, TAKING RESPONSIBILITY FOR OUR OWN ACTIONS AND THEIR IMPACT
- WE INNOVATE – WE EMBRACE NEW IDEAS, FINDING BETTER SOLUTIONS AND WAYS TO SUPPORT OUR CUSTOMERS

BARROW & DISTRICT.....

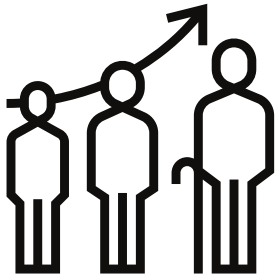
OUR COMMUNITY, STATISTICS & DEMOGRAPHICS



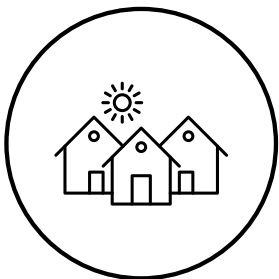
Between the last 2 censuses (2011 and 2021) the population of Barrow in Furness fell by 2.4% from just under 69,100 in 2011 to around 67,400 in 2021.



It is projected that by 2028 in the Westmorland and Furness area (area formally covered by Barrow in Furness, Eden and South Lakeland) the number of 0-15 year olds and 16-64 year olds are projected to decrease with people over 65 increasing by 29.4%.



Public Health England (PHE) report that average life expectancy in Barrow-in-Furness is 77.7 years for males and 81.5 years for females; both significantly lower than the national average which is 78.7 for Males and 82.8 for Females.



Of the 49 neighbourhoods in Barrow in Furness, 15 are among the 20% most deprived in England (which has a total of 32,844 neighbourhoods).

These deprived communities are located within: Central; Hindpool; Barrow Island; Ormsgill; Risedale; and Newbarns.



STRATEGIC PRIORITIES



Our staff will feel supported and fulfilled in their roles and would recommend working for Age UK Barrow and District.

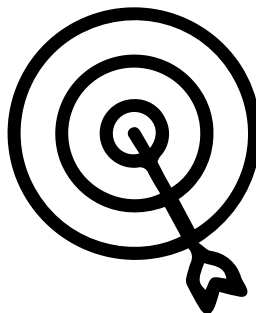
We will work with local partner organisations to increase our referrals, capacity and positive feedback.



Age UK Barrow grows and increases income via business development to ensure our longevity to deliver services to older people for as long as we are needed.



Age UK Barrow has excellent governance, will ensure staff compliance with mandatory training and will continue to monitor and review risks.



Our service users will value and benefit from our services and are supported in later life to feel safe, respected, to have choice and opportunities to lead a life that is enjoyable, meaningful and suited to their individual aspirations

OUR SERVICES

INFORMATION & ADVICE

Our Information and Advice Team are a major part of Age UK Barrow and District.



Due to their expertise, they cover every welfare benefit available to clients over Pension age, including Pension Credit, Attendance Allowance, Carers Allowance, State Pension etc. They complete benefit checks to enable clients to maximise their income, they complete complicated benefit claim forms and they support clients with contacting fuel providers, DWP and the Council. As well as welfare benefits, the I&A team cover a wide range of subjects that our client base need advice on, this can be anything from care needs, disability aids, disabled parking as well as general advice on numerous other subjects.

TELEPHONE BEFRIENDING

The telephone befriending service is aimed at those people who are housebound, lonely or feeling isolated. Clients receive regular telephone calls from a volunteer or one of our coordinators to have a friendly chat and receive support.

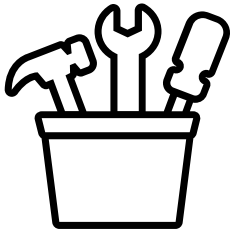
Through this service, we have identified many people in crisis and referred them on for urgent support from other social and health care professionals



HANDYPERSON

Our Handyman is there to carry out jobs for older people as a way to help keep them safe and remain independent in their own home.

Our handyman can undertake small, minor DIY tasks and installation of home safety equipment. He is fully insured and DBS checked.



SOCIAL GROUPS & ACTIVITIES

We offer a comprehensive activities timetable suitable for people of all abilities. Sessions range from social groups such as craft and knitting clubs to coffee mornings, games and chat groups.

Physical activity groups are specifically designed to improve peoples fitness, wellbeing, muscle tone and core strength.

Groups are organised by a team of activities coordinators and volunteers who offer a warm welcome to anyone wanting to come along and join in.



RETAIL

Our charity retail shop sells a wide range of quality used goods including, clothes, books, furniture, electrical items and general household items.

All of the money raised in our shop is kept locally to support the services Age UK Barrow and District deliver.



VOLUNTEER OPPORTUNITIES

Volunteers play a vital role in our service delivery. They are the heart of our organisation and without their support, we wouldn't be able to offer as many services as we do. Volunteering has many benefits and can help people to meet new friends, learn new skills and increase confidence. We have many roles available and encourage people to come and join in!



INFORMATION & ADVICE SERVICE PROVISION 2022/23



**MARIE CONNOR
INFORMATION &
ADVICE MANAGER**

It's amazing how quickly the time has passed, and it is time to look back at what has been achieved over the last year.

Reading through the report for the last financial year 2021/22, we detailed how demand for the service was unprecedented. This year the request for the service has certainly not diminished and demand has indeed increased year on year. The number of clients accessing the service has increased by 15% from the previous year.

We believe several factors are responsible for the increase in demand for the Information and Advice service. There are clear challenges facing both the NHS and Social Services, due to the problems experienced by these statutory services, clients seek support from alternative sources.

We deal with a wide range of queries such as inability to register with an NHS Dentist, lengthy waiting lists for urgent operations, clients experiencing potentially unsafe discharge from hospital. We hear reports of long waits for GP appointments, that can leave our clients seeking the services of the local A&E department.

There is an ongoing problem with recruitment and retention of care staff, this problem is affecting older people accessing respite care, and contributes to delayed discharge from hospital.

The recruitment of care staff is a national problem, but is particularly problematic in this area. It's difficult for smaller organisations to compete with employment opportunities and salaries offered by BAE Systems.

In addition to these problems, 16% of people aged over 65 are now unpaid carers. Statistics tell us that 1 in 11 people in this age group have a form of dementia. The national average of people aged over 65 is 18.5%, the average locally is at 21.9%.

Older people continue to face difficulties with many services becoming progressively digital. Many of our clients have limited to no skills, and no access to a smart phone, tablet or laptop. Clients can struggle with accessing services that are increasingly moving their services online.

It is estimated that there are over 2 million people aged 75 and over that are digitally excluded. The barriers that are faced when digitally excluded can be huge. Clients pay a premium for utilities, they have problems booking hotels, transport, banking, and shopping.

This is at a time, when the high street is in decline, banks are reducing opening hours and, in some cases, closing branches altogether. Increasingly clients are coming to us to help navigate their way around the digital barriers.



INFORMATION & ADVICE SERVICE

PROVISION 2022/23

Combined with the issues already mentioned, people are also struggling with the cost of living crisis, high energy bills, and increasing food costs. We believe that it is not one particular problem that has caused the increase in demand but an amalgamation of all of these issues.

The service helps more people than ever and our surveys, thank you cards, letters and donations reflect the value of the service.

We continue to offer a full and comprehensive benefit service dealing with a plethora of benefits. We support clients through their initial enquiry up to and including tribunal. We assist in identifying benefits entitlement, and where and when required, support throughout the whole claims process.



The feedback from our clients, is that without our support they would not only not have known what they were entitled to, but struggle to navigate their way through the claims process.

Annually, there is over £3.5 billion in unclaimed benefits for older people.

We help to educate, inform and support our clients through the minefield of the benefit system. We ensure clients receive where possible, their full entitlement.

We are not only a welfare rights service, and not everything we do can be given a monetary value.

We help clients access care, discuss financial assessments, complete Blue Badge applications, the list goes on and on. We do not always have the answers, but no client will be left unsupported, we refer, we signpost, we guide, we educate, we inform and most important of all, we listen.

There is no one within the team who does not feel privileged to be here doing the job we do and staff recognise how valuable our work is. Given the many and varied reasons for the increase in demand, our service is needed now more than ever.

In a positive step forward The Information and Advice Team were pleased to welcome two new members to our team. Rebecca Rigg joined Age UK Barrow & District in June 2021, initially as an apprentice receptionist. Rebecca's willingness to learn, dedication and commitment quickly became apparent and she applied for the full-time position of Gateway Advisor. In January 2023, we were fortunate to secure funding via Cumbria County Council to support this additional position which was a brilliant result for the overstretched I&A team. We also appointed Bryony Gibbons as I&A administrator who offers great support to the team.



Looking towards the year ahead, we are hoping that we can continue to build our current team. The demand is always there, we need to ensure that that at no time do we compromise quantity over quality.

We are under no illusion as to the challenges ahead, but we are a strong, hardworking dedicated team, and are very much looking forward to the future.

INFORMATION & ADVICE TEAM

The Information and Advice Department is a small cog in a much bigger wheel. We work closely with all services provided by Age UK Barrow & District including the activities team, handy person, and befriending. We speak to so many clients each day that we constantly feed into the other services provided by Age UK Barrow. Equally, it is a great benefit to other teams that they can refer in to us, offering our clients that all important holistic service.

It has been great to see the Information and Advice team expand which has enabled us to promote and advertise the service in the local community. Something we have never been able to do before due to capacity issues.

Rebecca's role was initially to deal with general enquiries, but after undergoing a period of intensive and comprehensive training, she is now dipping her toe into the murky waters of welfare benefit advice. We are sure with ongoing support and encouragement, her knowledge and confidence in this area will continue to grow.

We are fortunate to have Bryony Gibbons supporting the team as Information and Advice Administrator, She carries out a wide range of admin tasks which is invaluable to the Gateway Assessors. Bryony's role is currently funded by the Cost Of Living Support Fund via Cumbria County Council. She has quickly become an integral part of the team and we would struggle to provide the service we do without her support.



BRYONY GIBBONS
INFORMATION & ADVICE
ADMINISTRATOR

REBECCA'S STORY



BECCA RIGG
GATEWAY ASSESSOR

I finished my Reception and Business Administration apprenticeship in December 2022 and following this, gained two Distinctions to achieve my qualifications with Age UK Barrow & District.

I applied for the full-time position of Gateway Assessor and was successful in my application. This role enables me increase my skills and knowledge around benefits, energy advice, completing benefit forms and triaging clients to make sure they receive the best possible service from Age UK Barrow & District.

I have really enjoyed the relationships I have formed with clients and helping them gain entitlements that they would have never applied for previously.

My role is very rewarding and I have been given a lot more responsibility to really excel in the position.

I have attended training courses including an Introduction to Benefits, Attendance Allowance, Energy Efficiency, Paying for Fuel and Dementia training. This has really benefited my role and I have gained a wider aspect on how to best advise my clients.

I have met key deadlines, help the team and support clients with successful and significant benefit gains.

"I have loved the transition from being an apprentice to becoming a full-time employee of the charity and hope to continue to learn and achieve more as I continue in this new role"
Rebecca - Gateway Assessor

INFORMATION & ADVICE, CLIENT STORIES

CLIENT AGED 66

Client, aged 66, was due to move from working age benefits to pensionable benefits. She was aware she was due to receive her State Retirement Pension, but was unsure how to claim this benefit.

Our Information and Advice team supported her throughout the entire claim process, and a full benefit check was completed to ensure all benefits were in place.

Client now receives State Pension of £185.15 per week, and Pension Credit of £66.85 per week.

She was awarded the Winter Warmth Fund as she was on a very low income, had numerous health issues and was living in a house that was difficult to heat. She was also awarded a £200 grant from The Household Support Fund.

Client called at a later date with further issues, advising that she was struggling financially and although her house was for sale, it was attracting little interest, she was thinking of leaving the house, and moving into rented accommodation. We advised of how benefits would be affected by making such a move.

She disclosed that she was feeling increasingly isolated in her home, and was struggling to manage, as her mental health was being affected. She gave us her permission to speak to both her GP and Adult Social Care and has since been contacted by both and is now being supported by the local Health And Wellbeing Coaches.

CLIENT AGED 69

Client, aged 69, initially contacted Age UK Barrow and District when she became aware that we were distributing the Winter Warmth Fund. She told us she was on a low income and after initial assessment, she was awarded the Winter Warmth Fund grant of £200.

Our advisors also offered the client a full benefit check, and duly advised that she may be entitled to Pension Credit amounting to £66.85 per week.



She was given full advice on how to claim, and later contacted us to tell us that she had been successful and would now receive £66.85 per week, this had been backdated and she received a lump sum of £1,069.60

Client thanked us for our help and told us what a difference this had made to her overall income, particularly given the current cost of living crisis.

As she is now successfully in receipt of Pension Credit, this automatically linked her into full Housing Benefit and Council Tax Support. In addition, payment of this benefit means she is also eligible for assistance with dental and optician costs.

Client has also been referred for a Home Energy Check, where she will be provided with full and comprehensive energy saving advice, combined with free installation of equipment to ensure her energy is being used efficiently.

INFORMATION AND ADVICE OUTCOMES 2022/23

156
SUCCESSFUL
ATTENDANCE
ALLOW/DLA
CLAIMS

1009
CLIENTS
ACCESSING THE
I&A SERVICE



660
EON BENEFIT
SESSIONS

351
SUCCESSFUL
BENEFIT
AWARDS

TOTAL AMOUNT
RECEIVED IN
UNCLAIMED &
BACKDATED
BENEFITS
£1,278,470

4451
CONTACTS
WITH CLIENTS

118 BLUE
BADGE
APPLICATIONS

We began delivering some social groups and activities in October 2021 using existing funding as part of the Live Longer Better project.

As a result of the successful, collaborative bid with our other Age UK project Partners and the Community Lottery Fund, we were able to continue and expand the activities under the Reconnecting Cumbria project.

With the funding, we appointed an activities coordinator and activities administrator who both knew the community well and quickly established good working relationships with key stakeholders and partners in the local area.

We gained feedback and input from clients about what kind of groups and activities they wanted to attend, many of whom, had struggled with the effects of the lockdown periods during the pandemic and had identified the need for gentle exercise groups to improve their mobility and fitness.

We found that many older people were still cautious about leaving their homes and it became apparent that there had been a significant decline in peoples overall mental and physical wellbeing. Groups started slowly, with only a few people initially attending, despite promotion and publicity. However, we very quickly, saw attendances increase and now facilitate over 30 groups with over 600 members, resulting on average, over 300 attendances each week. As the success of the groups continued and remained well attended, we have expanded our timetable.

The feedback from Clients so far has been extremely positive and as well as seeing some familiar faces, we have welcomed many new people who we hadn't met before, including some younger clientele who had become isolated during lockdown. They had lost touch with friends and family and wanted to meet new people and join in.

We currently have 27 volunteers helping and supporting the various different groups and activities. They have told us how much they enjoy helping out, it's their way of feeling that they are giving something back to the community and gives them a sense of purpose again.

Volunteering has a positive impact on peoples mental wellbeing and is a great way to increase their skills which can potentially help them gain future employment.



Lorna said

"the real fun and games began, as we were in a position to start thinking about opening up groups again for the first time since the pandemic. After careful planning I secured a free venue with The Forum and we trialed a new Knit & Natter group" "Initially there were only a few clients for the first few weeks. But, If you build it they will come! and they did! As awareness of the group increased, we quickly had a new, full group of people coming out every Thursday. We began to focus on our annual 'Big Knit' smoothie hat campaign which gave everyone something to focus on and targets to aim for!"

WHAT WE HAVE DELIVERED DURING THE YEAR

We put together a timetable of activities based on previous, pre pandemic sessions using some of the feedback we had gained from clients and made sure that all activities were inclusive for everyone of all abilities.

We initially started to work closely with Barrow Leisure Centre who had instructors trained in delivering OTAGO.

OTAGO is a gentle exercise programme specifically tailored to improve peoples core strength and mobility. Sessions were well attended and popular. Our clients told us they wanted more physical activities so we added a variety of sessions to our timetable, including line dancing, walking netball, strength and stability and yoga.

Our aim was to help reduce social isolation and combat the effects of loneliness as well as helping people to improve their physical abilities which had been greatly affected by being confined to their homes for such a long time during the pandemic

New clients attending told us that they were nervous about leaving their home after being indoors for such a long time but were really enjoying the new timetable we had put together.



For people who didn't fancy the physical groups, there was plenty of choice including, knit and natter, later lunchers, coffee mornings, game time, art group and card making.



Since joining the activity groups, i'm more mobile, i can walk far better than I could and the social side of the coffee mornings has been very good. I have even learned to knit!

I've made some very good friends and it has given me the confidence now to be more of the way I used to before my illness.

Mr T, Aged 70



WHAT HAS WORKED REALLY WELL?

Lorna, our activities coordinator told us that the last 12 months has been the best of working career. At the start of the project, she began to introduce herself to managers of potential venues around the town and started talking about what Age UK Barrow and District would like to achieve and why we felt it was so important to provide activities for older adults in the local community.



As a result of the teams hard work, dedication and commitment, the partnerships we have established are incredible.

Lorna remembers sitting at the very first knit and natter session, keeping her fingers crossed for someone to walk through the door, she now walks into a room of 30 smiley people each week who are thoroughly enjoying their time there.



Hosting groups and sessions out and about in the community works so well as we can reach new people as we have brought Age UK Barrow and District to them, whilst also supporting local venues to be well utilised.

One of the greatest achievements has to be seeing the progress of the clients. Since starting the groups, they have grown in confidence, formed new friendships and are trying things they have never done before. Lorna says "each week is just amazing"

Some of the highlights of the year have been the success of the art group who designed christmas cards to sell and raise funds for Age UK Barrow and District. They were sponsored by local business and were printed and bought by clients, staff, family and friends.

Clients have seen improvements in their physical and mental wellbeing as a result of attending regular, gentle chair based exercise sessions.



Nuffield Health have been a great support This year. They have given us the use of their fitness studio, free of charge, to hold Strength and Stability classes.

SOCIAL GROUPS & ACTIVITIES

The art group have gone from strength to strength and what started out as a few people sat around a table with a piece of paper and a few pencils, has gone on to become a close knit friendship group who have created some wonderful projects.

They designed some festive Christmas cards, which were professionally printed and sold, raising funds for Age UK Barrow & District.



We have been fortunate to work with Sharon Tate from ArtWorks - Art4all . She has been on hand to bring some project ideas to life, provide equipment and share her art and craft expertise. Clients have created some lovely pieces including portraits of Queen Elizabeth II for the Platinum Jubilee celebrations and even our beloved handcrafted sheep, Harold & Hilda, as part of the 'what the flock' event > They have gone on to make regular appearances around the town at various community events and are somewhat of local celebrities!



TELEPHONE BEFRIENDING

"I am so glad you were there to help when I came out of hospital, heaven knows how, at Christmas, I could have had shopping delivered as they just left me here".



Since the telephone befriending project began in March 2020, we have continued to receive a continuous flow of referrals from external sources including The Case Management Team, Adult Social Care and local GPs. Many clients were identified and referred internally via members of the Age UK Barrow team who easily saw those people really struggling with the effects of lockdown.

Older people were still very apprehensive about leaving their home and were feeling isolated and lonely so we quickly saw the demand for support, outweighing capacity.

As many people had been furloughed from their regular jobs, they wanted to do something to help and we were very fortunate to recruit lots of new, willing volunteers to help make regular telephone calls to those most vulnerable.

Unfortunately, funding for the befriending project came to an end in March 2023 after running for just over 3 years. The clients we have supported say they will miss us very much and hope that it will be replaced soon by something similar.

As Jackie and Sharon we closing the service, many clients were naturally upset as they had formed bonds and friendships with their volunteers.

Not only did the project help to connect lonely older people with someone to talk to, we were able to signpost them to other services being provided by Age UK Barrow & District such as the Winter Warmth fund, electric blankets, social activities and Information and Advice.

Most of the people that were still accessing the service towards the end, were socially isolated, housebound or just unable to get out often, especially to join something which they may have really enjoyed when more able.

Many of those using the service had underlying mental health issues and just needed someone to chat to. We have supported people who were terminally ill or bereaved along with their carers and family members throughout the project. Not only have we provided that telephone support, we have been able to arrange deliveries of emergency food parcels, raise safeguarding concerns with GPs and other agencies and have been a vital link between the client and the outside world.

We have been extremely fortunate to recruit wonderful volunteers, many of whom, will continue to call their clients, as they have done what the project expected and "befriended" them.

"I have no idea how I would have coped without you to talk to"

SINCE THE PROJECT
BEGAN IN MARCH 2020

79
VOLUNTEERS

273 CLIENTS

2 TELEPHONE
BEFRIENDING
COORDINATORS



HANDYPERSON SERVICE



Our Handyperson is there to carry out jobs for older people as a way to help keep them safe and remain independent in their own home.

The Handyperson can install a range of mobility adaptations to help people move around their home safely, such as grab rails and bannisters and even install a key safe to allow care agencies and families, essential access to their relatives home.

The Handyperson service is a real lifeline for many people. We know it can be difficult to find someone to carry out smaller jobs, so being able to offer this type of service to help older people remain safe and independent their own home, is vital.

Steve Tweddell joined our team in June 2022 and is an experienced joiner and construction worker. We have since appointed Dave, an additional Handyperson, to support during busy periods.

Our Handyperson also carries out free Home Energy Checks. The checks are funded as part of the EON warm homes programme and includes an assessment of the clients property to see if any free equipment such as radiator foils, LED lightbulbs or draught excluders could help to reduce energy help to keep their home warmer during the winter months.



STEVE TWEDDELL
HANDYPERSON



DAVE HYDE
HANDYPERSON





CHARITY SHOP

During the past year the shop has weathered the financial climate very well.

I am proud to say that sales have increased significantly from last year and continue to look promising. Winter and Christmas stock are of good quality and plentiful.

This year has seen an increase in high value products across all sale departments. We have a designated area specifically for our high-end clothing, this is proving positive and very often the go to area for many customers. Sandwich, Seasalt, White Stuff, White Company, Rab, Jack Wolfskin are a small example of regular brands donated, many new with tags.

There has been an increase in Gold and Silver jewellery donated, this is proving popular and we use a local jeweller to support the valuation and pricing of these items.

A new furniture delivery/collection company are now working with us which is working very well and will collect and deliver furniture when needed, even helping with house clearances.



SUE GIBBONS
RETAIL MANAGER

We have also received some very high end Furniture and Bric a Brac donations this year.

From the very beginning we developed a strategy of preparing stock for the seasons, and occasions. I have created themed displays and points of sale to highlight those high end items. This can take a lot of forward planning but staff and volunteers alike enjoy this process and as a result, we have seen an increase in sales in certain areas at given times.

Despite staff shortages and some challenging times, staff morale remains very high. We have tried to recruit new volunteers, but like other charity shops, this is proving difficult. We are always looking for new volunteers to join the team and are ideally on the look out for people who have specialist interests in reading, antiques, furniture and clothing. A lot of work goes on behind the scenes to sort and prepare donated items for sale and we need volunteers to help in the warehouse.



We all take pride in the roles we play and this is reflected in the shop. Whilst there have been some big challenges this year it has also been enjoyable.



CHARITY SHOP



DONATING GOODS TODAY?



Make your donated items to Age UK Barrow & District go further. Speak to staff today about signing up



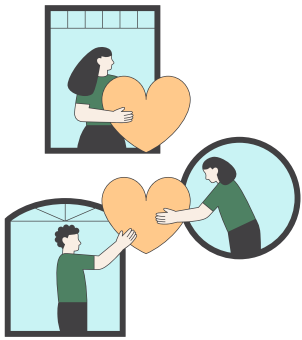
We continue to receive superb feedback from customers who comment positively about the service they receive, we are regularly complimented on how lovely the shop looks, and how helpful everyone is.

The charity shop is a 'recommended place to visit' to holiday makers staying at the local Haven holiday site in Flookburgh.

Customers have become friends with staff and volunteers, often asking after the wellbeing of each other when paying regular visits to the shop. We have been asked many times if we would think about having a coffee shop on the premises. This is food for thought and something we would be keen to explore in the future.

We wouldn't be able to create such a warm and welcoming environment for our customers, if it wasn't for the dedication, hard work and commitment of our shop volunteers. They work tirelessly behind the scenes to help Sue and Mark make the shop so successful.

All of the funds raised from the sale of donated goods are kept locally and continue to support the services provided by Age UK Barrow & District.



" I volunteer because I want to give something back to the community. I absolutely love interacting with the customers. The shop is immaculate and it's an absolute pleasure to work here"

Sue aged 72 (volunteer)



Our volunteers always turn up with a smile and even manage to find time to have some fun!





VOLUNTEERS



Volunteers are at the heart of any charity organisation and their contributions are nothing short of vital and invaluable. Their dedication and unwavering commitment play a pivotal role in the success and sustainability of our mission. Without the support of volunteers, our charity would not be able to reach those in need, effect positive change, and make a meaningful difference in our community.

Volunteers bring with them a wealth of skills that enrich our charity. They offer their time and passion freely, allowing us to stretch our resources further and maximize our impact.

Beyond the practical support they provide, volunteers also serve as ambassadors for Age UK Barrow & District, raising awareness and generating support through their interactions with clients and customers. Their enthusiasm and dedication inspire trust and confidence and will hopefully encourage more people to join our team.

In summary, volunteers are at the centre of our charity, driving us forward with their energy and we are extremely grateful for their ongoing commitment. We really couldn't deliver the services we do without them.

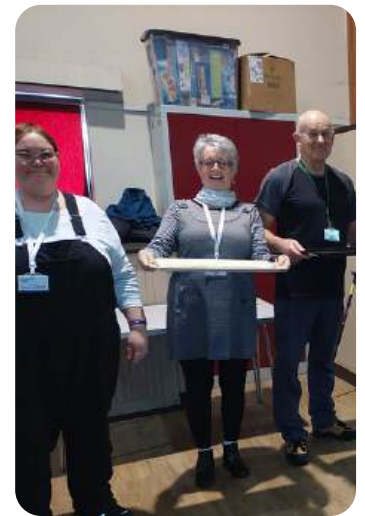


VOLUNTEERS

I joined the Barrow Age UK charity shop staff in February 2020. Since then I have made friends with other staff members and I feel like part of a family. By adding to my retail experience, I am hoping it might help me in my search for a part time retail job.



TRISH – INFORMATION & ADVICE ADMIN VOLUNTEER



SAM, JULIA & ROY VOLUNTEERS

"My name is Tracey Schofield. I am the volunteer and services coordinator for Age UK Barrow & District. I really enjoy the role, especially the social aspect.

I am the happiest when I am meeting with volunteers and clients in social group settings. I get a lot of satisfaction from seeing how the services we provide, make a difference to peoples lives. I often hear volunteers say the same when they are asked, why do you volunteer? Their response, always a very positive one.



TRACEY SCHOFIELD VOLUNTEER COORDINATOR

VOLUNTEERS

We currently offer volunteer roles in a number of different areas and projects, such as telephone befriending, retail, activities and social groups.

Our volunteers are invaluable to our organisation and play a vital part in helping us to deliver essential services to older people in the community.

We recently asked our volunteers to complete a satisfaction questionnaire to allow us to gain feedback, suggestions and comments. With this information we can monitor their progress and aim to improve their overall experience of being a volunteer with Age UK Barrow and District.

87%

OF VOLUNTEERS TOLD US THEY LOVE THEIR ROLE WITH AGE UK BARROW AND ENJOY BEING A VOLUNTEER.

83%

OF VOLUNTEERS SAID THEY FELT VALUED IN THEIR ROLE.

78%

OF VOLUNTEERS TOLD US THEY FELT SUPPORTED AND FULFILLED IN THEIR ROLES.

70%

OF VOLUNTEERS TOLD US THAT WE HAD PROVIDED GOOD TRAINING OPPORTUNITIES AS PART OF OUR VOLUNTEER TRAINING AND INDUCTION PROGRAMME.



"I have been with Age UK Barrow since 2014. I have done lots of different volunteer roles. Not only do I help them, but I get help back and it's built my confidence up no end"



FURNESS PRIDE

Age UK Barrow & District were proud to take part in this years annual pride event. Organised by our friends at Drop Zone Youth Project, we were happy to represent and support our LGBTQ+ clients. It was a fun filled day and even the sun decided to make a very welcome appearance.



CELEBRATING THE PLATINUM JUBILEE



We joined in the jubilee celebrations and attended the fantastic community street party. Lorna was on hand with the Kurling set and showcased some amazing artwork created by our very own art group.



Some of our clients attended the Jubilation event at Barrow Library where they were invited to come along and talk about their memories of the Queens coronation and significant life events during her reign.



SILVER SUNDAY OCTOBER 2022

Silver Sunday was initially launched as a local campaign to tackle loneliness and isolation, It is now a national day where people of all generations can come together by hosting fun and free activities for older people. It is a day where older people can meet new people, visit new places, try new activities and connect with their local communities and the generations around them.



THE AGE UK BARROW & DISTRICT TEAM AND LOCAL ORGANISATIONS CAME TOGETHER TO PUT ON A GREAT DAY FOR THE LOCAL OLDER COMMUNITY

This years event was held at The Forum in Barrow and was bigger and better than. More than 100 people came along to join in the fun. It was a day filled with singing, dancing, laughter and friends coming together, followed by a three course lunch.

We were joined by colleagues from other third sector organisations who shared helpful information with older people about their services.

There was live music from local singer Becki Fishwick who was accompanied on stage by a local sign language interpreter.

The lovely hall was filled with balloons and decorations and had a fabulous party atmosphere.



WHAT THE FLOCK!!.....

Our Knit & Natter and craft group were on fine form when it came to taking part in this fun community event. They had their wool at the ready and worked around the clock (or flock!) to create the first ever Age UK Barrow & District mascots, Harold & Hilda!

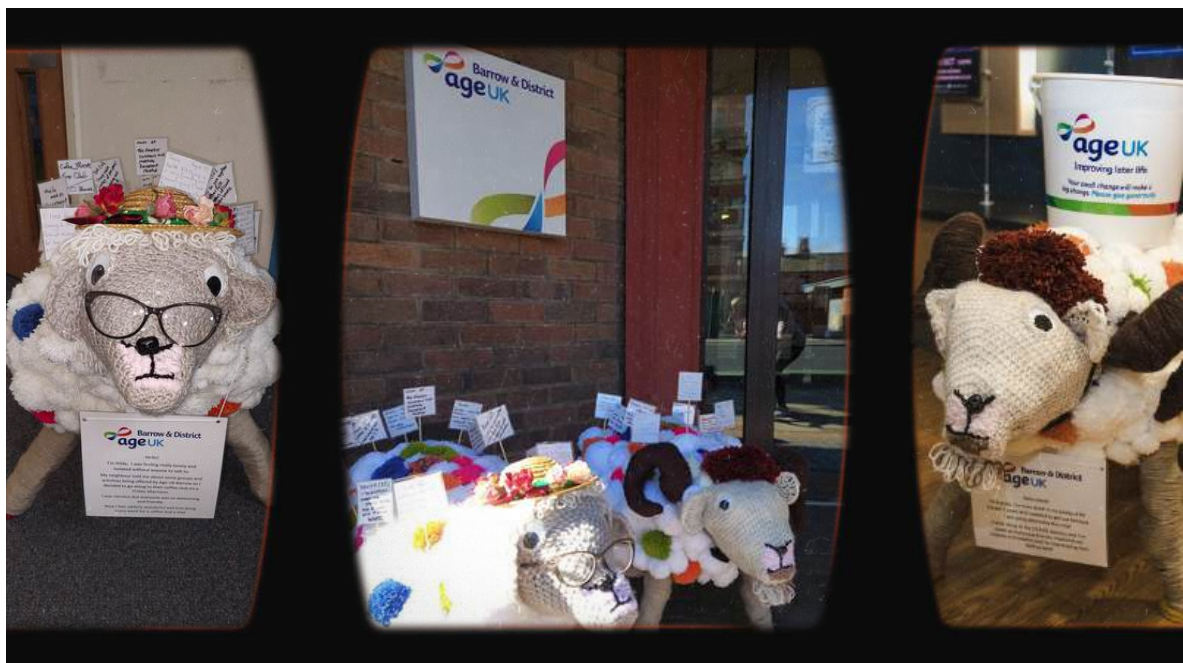
Harold and Hilda have become local celebrities, appearing at many local events throughout the year and have become a great conversation starter!

They kept our shop volunteers company for a while and could have been purchased 10 times over!



Babs, one of our volunteers, starting to put the body together.

Both sheep were constructed using chicken wire over a wooden frame and their fleece was made up using pom-poms created by our very keen knit and natter group and craft group. Both sheep contain over 1000 pom-poms and consist of the Age UK colours with the famous loop on their back!



COMMUNITY OUTREACH

As our services started to grow and expand, we wanted to get out and about to raise awareness of Age UK Barrow & District and what we have to offer and show what we can do to support the local older community.

Lorna and Steve were out and about spreading the word far and wide, handing out activities timetables and Age UK Barrow & District services leaflets



Lorna and Steve attended the annual community Christmas event, held at The Forum, accompanied of course, by Harold & Hilda!



Alison, Community Champion, at Morrisons supermarket was on hand to welcome Harold, Hilda and Lorna to spread the love on Valentines Day



Lorna took some of the wonderful art work created by the Wednesday Afternoon Art group to Barrow Market Hall to promote our social groups and activities.



WINTER WARMTH FUND 2022/23

Age UK Barrow and District were pleased to have supported Cumbria Community Foundation by distributing this years Winter Warmth Fund Grant.

Our Information and Advice team took the opportunity to assess clients who had applied for the Winter Warmth Fund grant by offering a free and comprehensive benefit check to ensure they were receiving the correct level of income. We assisted them to complete and submit the lengthy application forms.

We also offered a free home energy check which consisted of giving advice on keeping warm and well during the winter months, assistance with finding the most cost effective energy supplier and hints and tips on how to save energy around the home.

22%

of People who received the winter warmth fund, also received a free Home Energy Check, consisting of advice on how to stay warm and well during the winter months, ways to save money on energy and assisting with sourcing the most suitable energy tariff

£65,580

Total amount of funding received from the Winter Warmth Fund Grant



 **Winter Warmth Fund**

Age UK Barrow and District are once again, distributing Winter Warmth Fund Grants on behalf of Cumbria Community Foundation.

Grants are between £200-£300

In order to qualify, you must meet the following criteria:

- Be aged 60 or over
- Be a Cumbrian resident
- Those whose only income is the state pension (with or without pension credit) or
- Struggle to afford to heat your home adequately and/or maintain a reasonable standard of living this winter

£131,261.70

the total amount of unclaimed and backdated benefits processed for clients who received this years Winter Warmth Fund Grant.

298

Total number of grants awarded to people in receipt of state pension or pension credit

222

Of people who received the grant were in receipt of state pension

18%

of people that received the Winter Warmth fund grant this year, were identified as not being on the correct level of benefits

We were fortunate to receive funding from Cumbria County Council and BAE Systems once again this year to support our Winter Wellness campaign.

With the money we received, we were able to purchase over 70 electric throw blankets to hand out to people struggling to heat their homes due to rising energy costs.

We put together and delivered over 100 Winter Well parcels containing the Age UK Winter Wellness information leaflet containing advice about how to stay well during the cold winter months. The package also contained a thermal hat, gloves, a hot water bottle, flask and warm blanket.

People were extremely grateful to receive these and they made such a difference during the cold winter months.



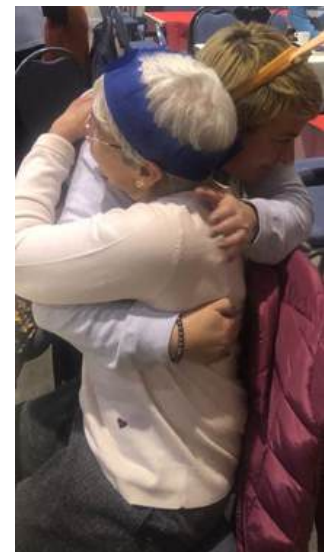
LATER LUNCHERS AT CHRISTMAS

Despite a huge snowstorm on the day, we managed to throw a fantastic Christmas celebration for our Later Lunchers group the week before Christmas. The group usually meet once every month throughout the year and enjoy a social chat with games, singing, tea and biscuits. It was only right that we put on a special festive event!

We managed to dish up over 70 Christmas Lunches to our regular members and welcomed some new faces too!

We sang carols, played games and ate lots of chocolates and mince pies! Just what Christmas is all about, that, and friends coming together to celebrate.

Age UK Barrow staff were on hand to join in and we all gave a brilliant rendition of the 12 days of Christmas, led by our singing guru and volunteer Julia!



Lorna was spreading the festive cheer and offering out free Christmas hugs to anyone who needed one!



QUALITY & COMPLIANCE



AUDITS

In the last year we have successfully prepared for and passed the ISO 9001 Audit and have been busy preparing for the CQS audit which will take place in late 2023.

STAFF TRAINING

Staff are provided with different learning opportunities ranging from online modules covering mandatory topics such as Health & Safety, confidentiality and safeguarding. Learning needs are identified during the staff appraisal process and where possible training is arranged.

POLICIES AND PROCEDURES

Reviewing policies and procedures regularly is essential to ensure policies are kept current and up to date. Staff are made aware of any changes to policies and procedures are then approved and signed off by the trustee board.

QUALITY AND COMPLIANCE IS AN ESSENTIAL PART OF AGE UK BARROW AND DISTRICT.

As a business we need to ensure that we provide an excellent service to our clients and volunteers as well as our staff.

In 2023 we were challenged with completing the ISO9001:2015 Audit.

This Audit required us to show that we consistently provide high standards as set by the International Organisation of Standardisation (ISO) and show that we can provide quality, applicable services as well as covering all necessary statutory and regulatory requirements.

I am very proud to say that we passed this Audit with 'flying colours' and were complemented by the Auditor for the excellence of our work.

Next year we have another Audit pending (Charity Quality Standard) and have already started to prepare for this.

Being the Quality and Compliance officer is a very interesting role and one that I thoroughly enjoy. Being able to see how the Business part of Age UK Barrow and District works and the processes needed to ensure that we continually meet all necessary requirements is challenging but rewarding, especially when we get such good feedback after an Audit!



HELEN FORREST
QUALITY & COMPLIANCE
MANAGER



FUNDING, GRANTS & PROJECTS

We rely on funding and grants to run projects and deliver essential services such as telephone befriending, social groups and activities. Without this financial support, we could not provide such worthwhile services. Each year, we look at what's needed in the community and listen to our service users to gain an insight into the type of groups and support that would benefit them. We work closely with other local organisations and stakeholders to gain information about what's happening in the most deprived areas to create and adapt our services to suit the needs of our service users.

We have been extremely fortunate to have successfully secured money from the following funders to enable us to deliver vital services and support to local, older people.

A big thank you to the following funders who were able to contribute to Age UK Barrow and District this year.



STATEMENT OF TRUSTEES RESPONSIBILITIES

The Trustees are required under the constitution of the charity to prepare financial statements for each year which give a true and fair view of the state of affairs of the charity and its results for that period.

In preparing those financial statements, the Trustees have;

- Selected suitable accounting policies and applied them consistently
- Made judgements and estimates that are reasonable and prudent
- Followed applicable accounting standards and statements of recommended practice, subject to any departure disclosed and explained in the financial statements
- Prepared the financial statements on a "going concern" basis.

We are hugely grateful to our Trustees for the time and commitment that they give to Age UK Barrow & District. Our Trustees are volunteers and give their time, skills and experience without benefit.

The Trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and also for taking reasonable steps for the prevention and detection of fraud and irregularities.

All Trustees are committed to the standards required of them in the Charity Governance Code.

BOARD STRUCTURE & GOVERNANCE

Age UK Barrow & District is an incorporated charity, a company limited by guarantee, registered with the Charity Commission and governed by its Memorandum and Articles of Association

OUR GOVERNANCE

We are governed by a regular schedule of structured meetings. Our governance structure includes bi-monthly meetings with additional meetings as required.

Our Chair, consulting CEO and Head of Barrow meeting regularly to provide updates and oversight of the charities work.

We carry out regular skills audits of Trustees to ensure that we have the right skills balance for the needs of the organisation and we recognise that those needs change from time to time. We are currently actively recruiting Trustees and welcome all relevant skills and specifically financial.

We use OnBoard software for our board paper management. This ensures that our information is retained securely, minimising the need for sending confidential information via email or other means.

REPORTING

We report against our strategy and targets via a reporting framework at every other board meeting (3 times annually). A schedule of reporting is maintained which includes a schedule for regular reports such as safeguarding, health & safety, information governance, complaints, finance, performance and quality and general policy and organisational updates as well as themed reports covering current topics and issues.

TRUSTEE RECRUITMENT & APPOINTMENT

Trustee recruitment is overseen by our Chair, and involving our consulting CEO. New Trustees are recruited based on our needs and any gaps in skills that have been identified which would be of benefit to the charity. Suitable people are identified from within our own networks, direct approaches and we advertise on social media.

We have an established process for recruiting new trustees and for their reappointment.

OUR TRUSTEES

At the time of writing this report, we have 4 Trustees and Age UK Barrow & District are grateful to them for volunteering their time and commitment to the charity.

Our Trustees have a regular review with the Chair of the Board and is an ongoing process. We have a range of materials available to support the induction of new trustees to ensure that they have all of the necessary information to support them in their role as trustee.

Trustee training is provided both inhouse and externally as appropriate. We make use of free training, often provided by legal companies.

MANAGEMENT

Day to day management of the charity is delegated to the consulting CEO and Head of Barrow. The consulting CEO reports directly to the Board of Trustees, providing papers and reports on an ongoing basis. The consulting CEO and Head of Barrow meeting on a fortnightly basis to review and discuss performance, strategy, policy and all issues linked to the management of the charity on a day to day basis. There are regular team meetings to cascade information across the charity.

Age UK Barrow & District maintains a transparent system for remunerating all employees including senior management. All staff are paid according to a clearly defined scale. In addition to regular external benchmarking of our roles, our salaries are reviewed annually by our Trustees who make the final decision regarding pay increases, including that of our senior team.

INTERNAL CONTROLS & QUALITY STANDARDS

The Board of Trustees is responsible for the financial controls within the charity, for safeguarding the physical and information assets. Financial procedures are developed, reviewed and revised in line with ISO9001:2015 quality management standards.

A CRM system and financial management system is maintained to capture and report on the performance of the charity and to ensure that the Board of Trustees receive accurate and timely management information.

Policies and procedures are reviewed and revised in line with our audit schedule. Key policies are approved by the Board of Trustees. Changes to policies are cascaded to our staff.

RISK MANAGEMENT & BUSINESS CONTINUITY

Trustees oversee our risk register and have adopted a robust risk management policy and procedures. A detailed annual review of all risks is carried out at least annual by the Trustees and bi-monthly risk reports are reported to Board, ensuring that Trustees are fully informed, updated and engaged in our management of risk. The bi-monthly report highlights new risks, risks where scores have changed and high-level risks.

A business continuity plan complements the risk register to ensure where natural and unavoidable disasters occur, the business is managed to avoid ongoing or unnecessary risks to mitigate them wherever possible.

FINANCE

Statement as to Disclosure of Information to Independent Examiners

So far at the Trustees are aware, there is no relevant information of which the charity's independent examiners are unaware, and each Trustee has taken all the steps that they ought to have taken as a trustee in order to make them aware of any information to establish that the charity's independent examiners are aware of that.

Our accounts are prepared on a "going concern" basis of accounting. Having reviewed our financial position and performance including our cashflow, budgets and forecasts, our commitment and reserves, our risk management and future plans and strategy, the Trustees are of the opinion that the charity remains a going concern.

RESERVES & FINANCE REVIEW

We made a deficit in the year of £8,733 (2022 deficit of £94,301)

Age UK Barrow & District retains a reserves policy which is monitored throughout the year and formally reviewed on an annual basis by the Board of Trustees. The reserves that we have are covering our operating costs while we take action to develop new income streams and bring the charity back to profit. The reserves policy requires us to have 6 months of operating costs in reserve and the year ended with 4 months. The Trustees are aware that our reserves are lower than we would like them to be and have a strategy in place to address this.

The funds in our reserves amounted to £303,630. This amount includes £16,522 of restricted funds allocated for specific projects, £281,108 designated reserves.

AGE UK BARROW & DISTRICT

REGISTERED CHARITY NUMBER

1149975

REGISTERED OFFICE

Age UK Barrow & District
2nd Floor, College House
Howard Street
Barrow in Furness
Cumbria, LA14 1NB

TRUSTEES

Martin Pettifor (Chair)
Oliver Pearson
Susan Ferm
Neil Ward (appointed 08.08.22)

Lynne Chambers (appointed 22.03.23, resigned 26.05.23)

Richard Cupid (resigned 29.09.23)

CONSULTING CHIEF EXECUTIVE

Teri Stephenson

MANAGEMENT TEAM

Vickie Martin - Head of Age UK Barrow
Helen Forrest - Operations Manager
Graeme Neale - Business Development Manager
Marie Connor - Information & Advice Manager
Sue Gibbons - Retail Manager

STAFF TEAM

Carolyn Hodgson - Senior Admin & Finance
Becca Rigg - Gateway Assessor
Joshua Taylor - Gateway Assessor (Joined May 2023)
Bryony Gibbons - Admin
Lorna Simpson - Activities Coordinator
Steve Tweddell - Handyperson/Activities Officer
Dave Hyde - Handyperson
Mark Barrow - Senior Retail Assistant
Tracey Schofield - Volunteer Coordinator
Jackie Hyles - Telephone Befriending Coordinator
Sharon Tucker - Telephone Befriending Coordinator

INDEPENDENT EXAMINER

RfM Ulverston Ltd
Bellevue
Princess Street
Ulverston
Cumbria
LA12 7NB

APPROVED BY THE BOARD OF TRUSTEES ON 28TH NOVEMBER 2023

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

The trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the new year ended 31 March 2022. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP FRS102) "Accounting and Reporting by Charities" issued in October 2019.

The Trustees are pleased to present their report together with the financial statements of the Charity for the 12 months ending 31 March 2023.

Legal and administrative information is incorporated within this report.

The Trustees confirm that they have referred to the guidance contained in the Charity Commissions general guidance on public benefit when reviewing the charity's aims and objectives and in planning its future activities.

The financial statements comply with current statutory requirements and the Statement of Recommended Practice - Accounting and Reporting by Charities 2019.

OBJECTIVES AND ACTIVITIES

Objectives and aims

The organisation's purpose remains to improve the lives of older people residing in the Borough of Barrow and District. We will work with older people to help them retain their independence and exercise real choice in their lives. Our services and activities are available to all older people in our Borough and our charitable services are provided either free of charge or charged by us at the most reasonable cost viable.

Our Vision Statement is:

Age UK Barrow and District will work with and for older people to provide a wide range of quality services and activities. It is dedicated to improving and maintaining this aim.

Age UK Barrow and District aims to be an effective organisation that listens to, and is influenced by, its users and the wider community, it will work towards the removal of age as a barrier to opportunity and choice for all.

Our main aims are to:-

Increase the range of our target market who use our services and products

Increase the range of services available to older people

Increase demonstrable quality in all areas of operation

Ensure stakeholder involvement in determining our direction

Increase relevant skills base and knowledge of personnel,
both staff and volunteers

Maintain adequate reserves and increase financial security

Develop partnership arrangements where feasible and desirable

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

Although an independent local charity, Age UK Barrow & District is a brand partner with the national charity Age UK and a member of the Age England Association of Age UK brand partners.

The organisation was established in February 1979 with the constitutional aim to "support and improve the quality of life for all older people living in the Borough of Barrow-in-Furness".

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

The Board of Trustees is the body responsible for the overall governance, management and direction of the charity. The trustees are responsible for ensuring that the organisation operates within the law and to a high standard.

They are led by the Chairman who works in partnership with the Chief Executive in identifying the vision of Age UK Barrow and District and the strategic direction it will take. Decisions on the day to day operation of the charity are delegated by the Board to the Chief Executive and subsequently the management team.

Nominations to the Board may be made by the Board itself or the organisation may also seek to recruit Trustees by word of mouth or through voluntary sector/specialist press.

All new Trustees, following NCVO Standards of Good Governance undertake an induction programme and are given a copy of "CC3 The Essential Trustee: What you need to know".

The Trustees are responsible for:

Ensuring that the Charity complies with its governing document, charity law and any other relevant legislation or regulations

Ensuring that the Charity pursues its charitable objects

Ensuring that the Charity does not spend money on activities not included in its own objects

Making an active contribution: giving firm strategic direction to the organisation, setting overall policy, defining goals, setting targets and evaluating performance against agreed targets

Safeguarding the good name and values of the Charity

Ensuring the financial stability of the Charity

Protecting and managing the property of the Charity and ensuring that the Charity's funds are properly invested

The Trustees have overall responsibility for ensuring that the charity has appropriate systems of internal controls in place across the organisation. They are also responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and ensure that financial statements follow best practice.

The Charity is committed to the on-going development of quality assurance through all parts of our organisation, through continuous improvement and self assessment and adherence to set standards. We continue to hold ISO 9001 quality standards.

Risk management

The Trustees have responsibility for implementing a managed approach to risk management.

The Trustees have conducted their own review of the major risks to which the organisation is exposed and systems have been established to mitigate those risks.

The organisation has a register which is regularly monitored and assessed to evaluate identified risks and identify new risks. They have considered the likelihood of occurrence, the potential impact of identified risks and the controls already in place to mitigate those risks together with the need for further action where necessary.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Company number

08224619 (England and Wales)

Registered Charity number

1149975

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

Registered office

Age UK Barrow & District
College House
Howard Street
Barrow-in-Furness
Cumbria
LA14 1NB

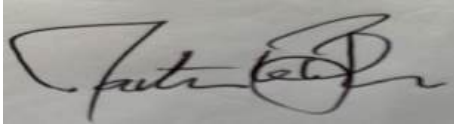
Trustees

O Pearson Independent Advocate
R Cupid Duty Officer
Mrs S M Ferm Consultant
M Pettifor Director
R W Spenceley Ships Captain, Merchant Navy

Independent Examiner

R F Miller & Co
Double Tree Court
10A Cavendish St
Ulverston
Cumbria
LA12 7AD

Approved by order of the board of trustees on 12 December 2023 and signed on its behalf by:

A handwritten signature in black ink, appearing to read 'M Pettifor', is written over a light grey rectangular background.

M Pettifor - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF AGE UK BARROW AND DISTRICT LIMITED

Independent examiner's report to the trustees of Age UK Barrow And District Limited ('the Company')

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 March 2023.

Responsibilities and basis of report

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under Section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under Section 145(5) (b) of the 2011 Act.

Independent examiner's statement

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body. I can confirm that I am qualified to undertake the examination because I am a member of the Association of Chartered Certified Accountants, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by Section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of Section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities (applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)).

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.



Anita Brook FCCA

R F Miller & Co
Double Tree Court
10A Cavendish St
Ulverston
Cumbria
LA12 7AD

Date: 12 December 2023

AGE UK BARROW AND DISTRICT LIMITED

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2023

	Notes	Unrestricted funds £	Restricted funds £	2023 Total funds £	2022 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies	2	227,124	129,463	356,587	124,469
Other trading activities	3	141,744	947	142,691	127,837
Investment income	4	<u>298</u>	<u>-</u>	<u>298</u>	<u>925</u>
Total		<u>369,166</u>	<u>130,410</u>	<u>499,576</u>	<u>253,231</u>
EXPENDITURE ON					
Raising funds	5	235,056	4,640	239,696	129,078
Charitable activities	6				
Charitable activities		<u>135,816</u>	<u>132,797</u>	<u>268,613</u>	<u>218,454</u>
Total		<u>370,872</u>	<u>137,437</u>	<u>508,309</u>	<u>347,532</u>
NET INCOME/(EXPENDITURE)					
Transfers between funds	14	(1,706) <u>114</u>	(7,027) <u>(114)</u>	(8,733) <u>-</u>	(94,301) <u>-</u>
Net movement in funds		(1,592)	(7,141)	(8,733)	(94,301)
RECONCILIATION OF FUNDS					
Total funds brought forward		288,701	23,662	312,363	406,664
TOTAL FUNDS CARRIED FORWARD		<u>287,109</u>	<u>16,521</u>	<u>303,630</u>	<u>312,363</u>

The notes form part of these financial statements

AGE UK BARROW AND DISTRICT LIMITED (REGISTERED NUMBER: 08224619)

**BALANCE SHEET
31 MARCH 2023**

	Notes	Unrestricted funds £	Restricted funds £	2023 Total funds £	2022 Total funds £
FIXED ASSETS					
Tangible assets	11	4,519	-	4,519	4,288
CURRENT ASSETS					
Debtors	12	45,168	7,573	52,741	49,360
Cash at bank and in hand		<u>329,956</u>	<u>13,949</u>	<u>343,905</u>	<u>314,558</u>
		375,124	21,522	396,646	363,918
CREDITORS					
Amounts falling due within one year	13	(92,535)	(5,000)	(97,535)	(55,843)
		<u> </u>	<u> </u>	<u> </u>	<u> </u>
NET CURRENT ASSETS		<u>282,589</u>	<u>16,522</u>	<u>299,111</u>	<u>308,075</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>287,108</u>	<u>16,522</u>	<u>303,630</u>	<u>312,363</u>
NET ASSETS		<u>287,108</u>	<u>16,522</u>	<u>303,630</u>	<u>312,363</u>
FUNDS					
Unrestricted funds	14			287,108	288,701
Restricted funds				<u>16,522</u>	<u>23,662</u>
TOTAL FUNDS				<u>303,630</u>	<u>312,363</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 March 2023.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 March 2023 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for

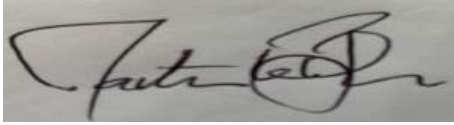
- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

The notes form part of these financial statements

**BALANCE SHEET - continued
31 MARCH 2023**

These financial statements have been prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

The financial statements were approved by the Board of Trustees and authorised for issue on 12 December 2023 and were signed on its behalf by:

A handwritten signature in black ink, appearing to read 'M Pettifor', is written over a light grey rectangular background.

M Pettifor - Trustee

AGE UK BARROW AND DISTRICT LIMITED

NOTES TO THE CASH FLOW STATEMENT
FOR THE YEAR ENDED 31 MARCH 2023

1. RECONCILIATION OF NET EXPENDITURE TO NET CASH FLOW FROM OPERATING ACTIVITIES

	2023 £	2022 £
Net expenditure for the reporting period (as per the Statement of Financial Activities)	(8,733)	(94,301)
Adjustments for:		
Depreciation charges	3,739	2,902
Interest received	(298)	(925)
Correction of fixed asset values	-	(3,866)
(Increase)/decrease in debtors	(3,381)	3,364
Increase/(decrease) in creditors	<u>41,692</u>	<u>(19,015)</u>
Net cash provided by/(used in) operations	<u>33,019</u>	<u>(111,841)</u>

2. ANALYSIS OF CHANGES IN NET FUNDS

	At 1/4/22 £	Cash flow £	At 31/3/23 £
Net cash			
Cash at bank and in hand	<u>314,558</u>	<u>29,347</u>	<u>343,905</u>
	<u>314,558</u>	<u>29,347</u>	<u>343,905</u>
Total	<u>314,558</u>	<u>29,347</u>	<u>343,905</u>

The notes form part of these financial statements

AGE UK BARROW AND DISTRICT LIMITED

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. ACCOUNTING POLICIES

BASIS OF PREPARING THE FINANCIAL STATEMENTS

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

INCOME

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

EXPENDITURE

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

TANGIBLE FIXED ASSETS

Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value, over the useful economic life of that asset as follows:

Equipment	15% straight line
Fixtures and fittings	15% straight line
Computer equipment	33.3% straight line
Freehold property	2% straight line

Where donations are received for specific equipment, the donation is included in income, the asset is capitalised and depreciation is charged on the full amount.

TAXATION

The charity is exempt from corporation tax on its charitable activities.

FUND ACCOUNTING

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

PENSION COSTS AND OTHER POST-RETIREMENT BENEFITS

The charitable company operates a defined contribution pension scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023**

2. DONATIONS AND LEGACIES

	2023	2022
	£	£
Donations	4,849	6,828
Gift aid	2,318	2,004
Grants	<u>349,420</u>	<u>115,637</u>
	<u>356,587</u>	<u>124,469</u>

Grants received, included in the above, are as follows:

	2023	2022
	£	£
Other grants	<u>349,420</u>	<u>115,637</u>

3. OTHER TRADING ACTIVITIES

	2023	2022
	£	£
Shop income	116,192	107,446
Support service charges	17,530	10,450
Raffle income	139	109
Advice income	108	125
Miscellaneous income	<u>8,722</u>	<u>9,707</u>
	<u>142,691</u>	<u>127,837</u>

4. INVESTMENT INCOME

	2023	2022
	£	£
Deposit account interest	<u>298</u>	<u>925</u>

5. RAISING FUNDS

OTHER TRADING ACTIVITIES

	2023	2022
	£	£
Cost of services provided	116,325	31,578
Support costs	<u>123,371</u>	<u>97,500</u>
	<u>239,696</u>	<u>129,078</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023**

6. CHARITABLE ACTIVITIES COSTS

	Support costs (see note 7)
	£
Charitable activities	<u>268,613</u>

7. SUPPORT COSTS

	Operations	Finance	Information technology	Governance costs	Totals
	£	£	£	£	£
Other trading activities	121,096	1,497	604	174	123,371
Charitable activities	<u>216,092</u>	<u>6,343</u>	<u>686</u>	<u>45,492</u>	<u>268,613</u>
	<u>337,188</u>	<u>7,840</u>	<u>1,290</u>	<u>45,666</u>	<u>391,984</u>

8. NET INCOME/(EXPENDITURE)

Net income/(expenditure) is stated after charging/(crediting):

	2023	2022
	£	£
Depreciation - owned assets	<u>3,739</u>	<u>2,547</u>

9. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2023 nor for the year ended 31 March 2022.

TRUSTEES' EXPENSES

There were no trustees' expenses paid for the year ended 31 March 2023 nor for the year ended 31 March 2022.

10. STAFF COSTS

	2023	2022
	£	£
Wages and salaries	219,847	183,619
Social security costs	13,927	12,361
Other pension costs	<u>9,805</u>	<u>8,119</u>
	<u>243,579</u>	<u>204,099</u>

The average monthly number of employees during the year was as follows:

	2023	2022
Management and admin	3	5
Charitable activities	6	6
Cost of generating funds	<u>2</u>	<u>2</u>
	<u>11</u>	<u>13</u>

No employees received emoluments in excess of £60,000.

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023**

11. TANGIBLE FIXED ASSETS

	Fixtures and fittings £	Computer equipment £	Totals £
COST			
At 1 April 2022	15,254	28,102	43,356
Additions	<u>3,970</u>	<u>-</u>	<u>3,970</u>
At 31 March 2023	<u>19,224</u>	<u>28,102</u>	<u>47,326</u>
DEPRECIATION			
At 1 April 2022	12,762	26,306	39,068
Charge for year	<u>1,943</u>	<u>1,796</u>	<u>3,739</u>
At 31 March 2023	<u>14,705</u>	<u>28,102</u>	<u>42,807</u>
NET BOOK VALUE			
At 31 March 2023	<u>4,519</u>	<u>-</u>	<u>4,519</u>
At 31 March 2022	<u>2,492</u>	<u>1,796</u>	<u>4,288</u>

12. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Trade debtors	4,126	36,932
Other debtors	227	227
VAT	2,143	1,436
Prepayments	<u>46,245</u>	<u>10,765</u>
	<u>52,741</u>	<u>49,360</u>

13. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Trade creditors	9,550	(11,648)
Social security and other taxes	7,277	4,224
Other creditors	(2,503)	(1,987)
Wages control account	-	13,482
Accrued expenses	<u>83,211</u>	<u>51,772</u>
	<u>97,535</u>	<u>55,843</u>

AGE UK BARROW AND DISTRICT LIMITED

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

14. MOVEMENT IN FUNDS

	At 1/4/22 £	Net movement in funds £	Transfers between funds £	At 31/3/23 £
Unrestricted funds				
General fund	213,732	46,997	(3,414)	257,315
Charitable Trading	-	(9,774)	9,774	-
Advice Services	57,500	(27,544)	(9,456)	20,500
Services	<u>17,469</u>	<u>(11,386)</u>	<u>3,210</u>	<u>9,293</u>
	288,701	(1,707)	114	287,108
Restricted funds				
Age Works	-	(19)	19	-
Respectability	-	68	(68)	-
Telephone Befriending Service	3,550	(3,379)	16,351	16,522
Activities Project	20,112	4,825	(24,937)	-
Dementia MCST	-	6,220	(6,220)	-
Business Development	<u>-</u>	<u>(14,741)</u>	<u>14,741</u>	<u>-</u>
	<u>23,662</u>	<u>(7,026)</u>	<u>(114)</u>	<u>16,522</u>
TOTAL FUNDS	<u>312,363</u>	<u>(8,733)</u>	<u>-</u>	<u>303,630</u>

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	59,965	(12,968)	46,997
Charitable Trading	114,812	(124,586)	(9,774)
Advice Services	176,859	(204,403)	(27,544)
Services	<u>17,530</u>	<u>(28,916)</u>	<u>(11,386)</u>
	369,166	(370,873)	(1,707)
Restricted funds			
Age Works	-	(19)	(19)
Respectability	247	(179)	68
Telephone Befriending Service	39,429	(42,808)	(3,379)
Activities Project	82,518	(77,693)	4,825
Dementia MCST	8,216	(1,996)	6,220
Business Development	<u>-</u>	<u>(14,741)</u>	<u>(14,741)</u>
	<u>130,410</u>	<u>(137,436)</u>	<u>(7,026)</u>
TOTAL FUNDS	<u>499,576</u>	<u>(508,309)</u>	<u>(8,733)</u>

AGE UK BARROW AND DISTRICT LIMITED

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

14. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1/4/21 £	Net movement in funds £	Transfers between funds £	At 31/3/22 £
Unrestricted funds				
General fund	150,832	19,155	43,745	213,732
Charitable Trading	-	5,995	(5,995)	-
Advice Services	57,469	(67,075)	67,106	57,500
Services	17,469	(6,499)	6,499	17,469
Lakeland	<u>180,000</u>	<u>-</u>	<u>(180,000)</u>	<u>-</u>
	405,770	(48,424)	(68,645)	288,701
Restricted funds				
Age Works	-	(24,579)	24,579	-
Respectability	-	(766)	766	-
Hot Meals Service	-	(1,120)	1,120	-
Telephone Befriending Service	-	(4,049)	7,599	3,550
Virtual Project	894	420	(1,314)	-
Activities Project	<u>-</u>	<u>(15,783)</u>	<u>35,895</u>	<u>20,112</u>
	894	(45,877)	68,645	23,662
TOTAL FUNDS	<u>406,664</u>	<u>(94,301)</u>	<u>-</u>	<u>312,363</u>

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	24,032	(4,877)	19,155
Charitable Trading	103,494	(97,499)	5,995
Advice Services	82,064	(149,139)	(67,075)
Services	<u>10,605</u>	<u>(17,104)</u>	<u>(6,499)</u>
	220,195	(268,619)	(48,424)
Restricted funds			
Age Works	(24,535)	(44)	(24,579)
Respectability	105	(871)	(766)
Hot Meals Service	-	(1,120)	(1,120)
Telephone Befriending Service	39,548	(43,597)	(4,049)
Virtual Project	11,169	(10,749)	420
Activities Project	<u>6,749</u>	<u>(22,532)</u>	<u>(15,783)</u>
	<u>33,036</u>	<u>(78,913)</u>	<u>(45,877)</u>
TOTAL FUNDS	<u>253,231</u>	<u>(347,532)</u>	<u>(94,301)</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023**

14. MOVEMENT IN FUNDS - continued

A current year 12 months and prior year 12 months combined position is as follows:

	At 1/4/21 £	Net movement in funds £	Transfers between funds £	At 31/3/23 £
Unrestricted funds				
General fund	150,832	66,152	40,331	257,315
Charitable Trading	-	(3,779)	3,779	-
Advice Services	57,469	(94,619)	57,650	20,500
Services	17,469	(17,885)	9,709	9,293
Lakeland	<u>180,000</u>	<u>-</u>	<u>(180,000)</u>	<u>-</u>
	405,770	(50,131)	(68,531)	287,108
Restricted funds				
Age Works	-	(24,598)	24,598	-
Respectability	-	(698)	698	-
Hot Meals Service	-	(1,120)	1,120	-
Telephone Befriending Service	-	(7,428)	23,950	16,522
Virtual Project	894	420	(1,314)	-
Activities Project	-	(10,958)	10,958	-
Dementia MCST	-	6,220	(6,220)	-
Business Development	<u>-</u>	<u>(14,741)</u>	<u>14,741</u>	<u>-</u>
	<u>894</u>	<u>(52,903)</u>	<u>68,531</u>	<u>16,522</u>
TOTAL FUNDS	<u>406,664</u>	<u>(103,034)</u>	<u>-</u>	<u>303,630</u>

A current year 12 months and prior year 12 months combined net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	83,997	(17,845)	66,152
Charitable Trading	218,306	(222,085)	(3,779)
Advice Services	258,923	(353,542)	(94,619)
Services	<u>28,135</u>	<u>(46,020)</u>	<u>(17,885)</u>
	589,361	(639,492)	(50,131)
Restricted funds			
Age Works	(24,535)	(63)	(24,598)
Respectability	352	(1,050)	(698)
Hot Meals Service	-	(1,120)	(1,120)
Telephone Befriending Service	78,977	(86,405)	(7,428)
Virtual Project	11,169	(10,749)	420
Activities Project	89,267	(100,225)	(10,958)
Dementia MCST	8,216	(1,996)	6,220
Business Development	<u>-</u>	<u>(14,741)</u>	<u>(14,741)</u>
	<u>163,446</u>	<u>(216,349)</u>	<u>(52,903)</u>
TOTAL FUNDS	<u>752,807</u>	<u>(855,841)</u>	<u>(103,034)</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023**

15. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2023.

16. COMPANY LIMITED BY GUARANTEE

The company is registered as a Company Limited By Guarantee and does not have any share capital.

As at 31 March 2022 there were 5 members. The liability of each member in the event of the company being wound up is £1.