



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 2021
FOR
AGE UK BARROW AND DISTRICT LIMITED

AGE UK BARROW AND DISTRICT LIMITED

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FOR THE YEAR ENDED 31 MARCH 2021

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AGE UK BARROW & DISTRICT

Annual Report and Financial Statement

FOR THE YEAR ENDING 31ST MARCH
2021



Registered Charity Number:
1149975

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08224619

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A MESSAGE FROM THE CHAIRMAN, MARTIN PETTIFOR

The last 12 months have been challenging for us all, and particularly so for Age UK Barrow.

Having made significant losses in the previous 3 years, we started the pandemic uncertain that we would survive for a further 18 months.

We ended the pandemic a healthier, fitter organisation with a sharper focus on the communities we serve and an improved understanding of what we need to do.

Inevitably the journey was challenging and we had to make some difficult decisions. We sold both our historical Head Office, Lakeland House, and a bequeathed commercial property to ensure we now have sufficient "rainy day" money to continue to operate for the foreseeable future.



We relocated our charity shop from Rawlinson Street - our home for 15 years- to a larger, more modern store that is cheaper to run. However, the biggest challenge was having to say goodbye to some staff who had worked for Age UK Barrow for several years.

I recognise that these changes and all the uncertainty have been unsettling for our service users, as well as our staff and volunteers. However, they have been critical in ensuring we are in a better position to help some of the most vulnerable members of our community in Barrow. As painful as it was, restructuring our team has allowed us to bring in new, outward facing roles to help us reconnect with commissioners and other funding bodies locally.

While Age UK Barrow is part of a national charity, the money we receive centrally is only a small proportion of what we require to provide our services.

We stand or fall on the level of funding we receive locally; whether that is through public bodies like the Council or NHS, or through individual donations, legacies in wills, or store sales.

The new store has proved a huge success with customers, with sales more than doubling as we help fill the gap left by some of the recent high profile closures on the High Street. If you haven't discovered us yet on Wilkie Road, then please drop in. I am sure you will be pleasantly surprised by the quality and range of what we can now offer. Most importantly of all, the income from our store allows us to provide the many other services we offer free of charge.

All of which leads me to arguably Barrow's best kept secret. It continues to amaze me that our Information & Advice service helps some of the most vulnerable people in the area receive around £1million each year in unclaimed and backdated benefit support that they so urgently need. And yet they only represent a minority of the almost 3,000 people we support each year, helping to improve lives in very real and practical ways. The social impact of our Information & Advice team of just two people is all the more remarkable when you realise that other organisations have whole departments to support a similar number of people.

A MESSAGE FROM THE CHAIRMAN MARTIN PETTIFOR - CONTINUED

I joined Age UK Barrow as a trustee during the first lock-down and became Chair earlier this summer. With social distancing measures relaxing, I had the pleasure of meeting our team face to face for the first time in late September.

I was struck, but certainly not surprised, by the warmth of their welcome, their enthusiasm, and above all their absolute passion for helping the older members of our community live healthier, more independent, and more fulfilling lives. It's a small team, but I can honestly say we are lucky to have each and everyone of them working with us.

This has been a particularly demanding and unsettling year for them, but their commitment to Age UK's mission shines through. As one of them said to me "working here is like Christmas everyday"!

Like any charity, Age UK Barrow couldn't survive without its enthusiastic and talented volunteers, who are every bit as much a part of our team as their paid counterparts.

I was lucky enough to meet several of the volunteers working in our charity shop, and left with a smile on my face and an utter conviction that, under the excellent leadership of our shop manager, they are the main reason for the outstanding improvement in our store sales.

The pandemic saw a huge increase in volunteering across the country as we reconnected with our local communities. While many volunteers have had to step back with the return to working in offices, I want to express our appreciation for all that they contributed during the pandemic.

Our volunteers will be the first to tell you that they get as much out of volunteering as they put in. And the more volunteers we have, the more vulnerable and socially isolated people we can help across Barrow. If you haven't been a volunteer, try it out! You'll be amazed what you can get out of it, including vital board level experience for those of you interested in becoming trustees.

Finally, I would like to thank our departing Chair, Steven Harris, for the immense contribution he has made to Age UK Barrow and all those we support locally.

He has been a trustee for over 13 years, including being Chair for 6 years. He has piloted the charity successfully through some of the most challenging times any of us can recall, while balancing the demands of a key leadership role at BAE Systems.

Throughout all of this he has never lost sight of the fact that people are what makes our charity tick. I have a tough act to follow!

Martin Pettifor

A message from the head of Age UK Barrow & District Vickie Martin



Since joining Age UK Barrow in 2019, I have been so impressed with the dedication and commitment from everyone who works so hard to make Lakeland House a safe and welcoming environment for the older community.

Unfortunately, the Covid Pandemic changed the way we were able to deliver our services and all social groups and activities were suspended towards the end of March 2020. As we saw the country come to a halt and enter into a national lockdown, we knew we had to change the way we operated and we quickly responded to the needs of the community.

Many older people were frightened and apprehensive and didn't know how they were going to manage everyday tasks such as food shopping, collecting medication and keeping in touch with family and friends. Age UK Barrow had such a pivotal role to play, we knew our service users needed our support so we listened to what they needed.

Several staff worked from home and some came back into the office to set up a support hub where we coordinated emergency food parcels, hot meal delivery and medication collection and delivery.

The Age UK team worked tirelessly to make sure people received food, advice, support and comfort during a very worrying time.

I would like to offer my special thanks to the staff and volunteers for their dedication and selflessness over the last 12 months.

They have been the heart of the charity and have worked extremely hard to ensure we were able to continue to deliver a great service to our clients.

Whilst the last 12 months have been incredibly difficult for everyone, it has created many new opportunities for us as an organisation. We have been included in some wonderful community projects and as a result, have formed great connections and relationships with other voluntary organisations. It has been inspiring to see the way that the town came together in such a positive and responsive way to make sure that those people who were most vulnerable weren't forgotten and received the help they needed.

Over the next year, Age UK Barrow will work towards achieving our strategic objectives and plan to re-launch social groups, activities and information and advice from more community based locations. It's our aim collaborate with other organisations on different projects.

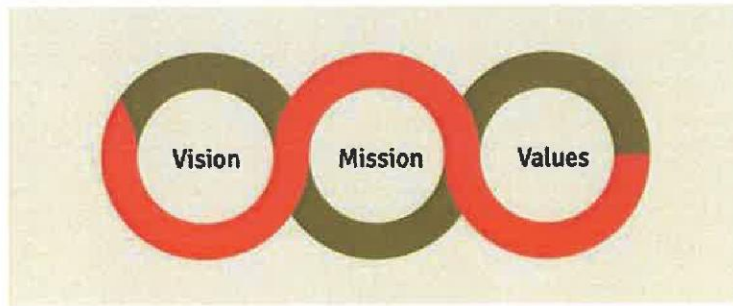
I feel very fortunate to be in a job role that is so fulfilling, enjoyable and gives me the opportunity to work for such a wonderful organisation that is such an integral part of the local community.

I am pleased to report on Age UK Barrow & Districts achievements and service provision for 2020 – 2021.

Vickie Martin

Head of Age UK Barrow & District

Our Vision, Mission & Values



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 innovate - We embrace new ideas, finding better solutions and ways to support our customers

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 care - we are inclusive, we support each other, treat everyone with respect, are accessible and listen & act in the best interests of all

We are proud to work here – we value Age UK Barrow, it's role in making a positive difference and are proud of our ability to make an impact through our work and in our communities

Our Community & Population



21.9% of people living in Barrow are aged 65 or over
35% of pensioners living in Barrow, live alone



- Income deprivation affecting older people living in Barrow is 0.147% which is higher than the national average of 0.107%
- Hindpool, Barrow Island and Ormsgill in Barrow rank within the top 3% of the most deprived areas nationally.

The Facts.....



Social isolation has a negative impact on health and wellbeing and by tackling social isolation, the pressures on health and social care can be reduced.



Reducing social isolation is likely to have a positive outcome for wellbeing and mortality rates.



Loneliness isn't just physical isolation or lack of companionship but can be the lack of a useful role in society.

Pensioners Who Live Alone



Within Cumbria 31.5% of pensioners live alone, or 32,398 people. This compares with 33.0% for the North West region, and 31.5% for England. Within Cumbria, Barrow-in-Furness has the highest proportion at 35.0%.

Something we have learned over the last year, is that there were so many older people who had never accessed Age UK's services. Those people reached out to us for help, advice and support or were referred to us by neighbours, friends or relatives. This made us realise that we needed to have a stronger presence within and around the town and borough.

We have reviewed the groups and activities we were offering previously and are currently planning to deliver social groups, activities and exercise classes from more community based locations such as community centres, halls and local leisure centres in order to reach as many people in and around the local communities.

We provide a lifeline to many people over the age of 60 who have very limited interaction with friends or family.

Our volunteering roles create opportunities to help people feel part of something important without having to feel committed to being in paid employment.

Information & Advice Service



Marie Connor
Information & Advice Manager

Here at Age UK Barrow & District we pride ourselves in providing a holistic service.

People often contact us with a minor query which can often lead to them being referred into one of our other services or signposted to another organisation in order for them to get the advice and help they need.

This year has presented the Information and Advice Department with many challenges.

Firstly, how could we continue to provide a service whilst keeping both staff and clients safe?

Secondly, looking at how we go from providing face to face appointments to giving information and advice by telephone?

We were initially provided with essential IT equipment to enable us to work from home. There was no time during the pandemic that the Information and Advice team were not available.

We quickly adapted our usual working practices and were able to collect paperwork from clients homes, obtain signatures and post relevant information. We completely changed the way we worked which involved a lot of creative thinking.

Continuing to provide a comprehensive Information and Advice service was not possible without the help and support of our dedicated volunteers. Their contribution was invaluable and we could not have run the service without them.

Providing advice by telephone presented numerous difficulties, for example, some clients struggle to hear, have speech issues, making it difficult for us to understand them clearly. In addition, without seeing clients face to face to gain a true picture of their physical health.

Despite working in such difficult circumstances throughout the pandemic, we have continued to provide a fully comprehensive 'gold star' service. The number of people receiving our support averaged around 56 per week. We continued to provide advice regarding our main topic areas, and the added queries that were Covid related.

Rules around restrictions were constantly changing and a lot of clients had limited digital skills which prevented them from accessing helpful information. We dealt with a wide range of enquiries regarding travel restrictions, visiting relatives in hospitals and care homes, appointment waiting times and accessing primary and secondary care services.

Many of our clients were in the shielding categories and were extremely vulnerable. Whilst others in the younger age groups made the best use of technology, this resource was not an option for many older people. Our telephone conversations became longer as the need for a friendly voice and human contact became essential.

We received funding again this year from E-on who continue to support the invaluable work we do. We were successful in delivering this project, and were one of very few Age UK's nationally to be offered additional funding based on our performance.

We were able to deliver over 300 Home Energy Checks helping to ensure that the most vulnerable, older people were warm and well during the winter of 2020/21. These checks included advice on Smart Meters, the benefits of regularly comparing energy costs against different providers, and the importance of using energy efficiently.





“...you have been so helpful, we had nowhere to turn”

“your help has been invaluable”.

To support our commitment and to ensure that our client base was warm and well during the winter, we were proud to have been selected by Cumbria Community Foundation to deliver and distribute The Winter Warmth Fund.

A total of 143 grants were awarded to older people, in fuel poverty who were living on a limited income. The grant was given to ensure that they were not worried about paying their winter energy bills.

Whilst the benefit outcomes remain impressive, it is important to remember we do not just offer a benefit and income checking service. It cannot be underestimated how grateful clients are on receiving support in a variety of areas including:

-  Help to obtain a Disabled Facilities Grant
-  Accessing aids and adaptations
-  Help with navigating their way through the community care system
-  Support in obtaining a Power of Attorney.

We are extremely fortunate that we are able to deliver such important services in an area which has high levels of poverty and deprivation. The work we do genuinely makes a difference to people's lives.

Although the last 12 months have been extremely challenging, the Age UK team are really looking forward to the year ahead and building on the foundations of relationships that have been formed during a very difficult time.

Information & Advice - The Results



Mr and Mrs M's Story



Mr M (aged 79) contacted our information and advice team as he expressed concerns that his wife (aged 78) was struggling and experiencing problems getting up and moving around their home.

A member of the I&A team made a referral to Adult Social Care for a full Occupational Therapist Assessment. However, on speaking to the client further, it became apparent that Mrs M met the criteria for Attendance Allowance, and an application was submitted.

Mrs M spoke about the help she received from her husband, despite him struggling to manage with his own health issues. After speaking to Mr M, a further claim was made for Attendance Allowance for him.

Mrs M was awarded Higher Rate Attendance Allowance of £89.60 per week and Mr M was awarded the Lower Rate Attendance Allowance of £60.00 per week. This successful claim meant they were eligible for other benefits and we assisted them in a claim for Pension Credit Guarantee which was again successful and was awarded at a rate of £92.40 per week.

Being successfully awarded Pension Credit Guarantee, entitles full Council Tax Support worth £25.00 per week.

Following the successful claims, Mr and Mrs M have now seen an increase in their weekly income of £267.00.

In addition, being in receipt of Pension Credit means that both clients are automatically entitled to free glasses, dental care, TV Licence and The Warm Home Discount.

Mr and Mrs M are using this extra money to pay for a cleaner and to improve their home to make it more energy efficient. They no longer worry about the cost of paying for taxis, and are able to get out and about frequently.

The increase in weekly income and access to free services has greatly improved their physical and mental health. Whilst their health issues are still present, they are more comfortable in their home and are managing to stay warmer, are eating healthier, balanced diets and have increased their social activities.

We were grateful to receive a letter to say a huge thank you for our kindness.

Following their initial enquiry, Mrs M has now received a full Occupational Therapy Assessment and has been supplied with numerous aids and adaptations that have enabled her to access the bath and move around her home safely.

“... we cannot thank you enough for all of your amazing help...”

Mr R's Story



“They ask you what your needs are and how you are managing, they help and give you great advice. Helen helped me very much from my first phone call and she made me feel better every time i spoke with her. I do not know what I would have done without her and her work colleagues, more than grateful”

Mr R, contacted us as after speaking to a friend who had received the Winter Warmth Fund payment. The client told us he was on a low income and was struggling to pay his energy bills.

Mr R asked one of our advisors if he was entitled or eligible to receive a payment from the fund.

Having assessed Mr R's income, we carried out a full benefit check. It was apparent that he was not currently in receipt of a Severe Disablement Premium, of which we felt he was entitled to. We advised him that we could raise this issue with the Department of Works and Pensions to see if they could re assess his overall entitlement.

Mr R gave his consent for us to contact the DWP on his behalf and after pursuing the issue for some weeks, this resulted in the additional premium being included, increasing his weekly income by £67.30 per week. The client also received a backdated payment of this premium amounting to £5,200.00. This was a fantastic result and Mr R was extremely grateful.

In addition, we carried out an energy price comparison and found a much cheaper provider resulting in an annual saving of just over £300.00 per year on his energy bills.

Covid - 19 - Age UK Barrow Response



When the global pandemic hit and the country went into national lockdown, things changed overnight. As a local charity, supporting older people in the community, we knew we needed to be ready and available for our service users. People were worried, scared and feeling uncertain about how they would be able to access basic essentials such as food and medication.

Following the recommended government guidelines, we closed Lakeland House and our staff worked from home. We immediately suspended all of our face to face activities and worked together with St Mary's Hospice who are a local cancer support charity and provided a support hub for those most vulnerable and elderly. Many of our service users didn't have internet access so struggled to access basic services. There was a huge demand for online supermarket shopping deliveries and pharmacies were overwhelmed with the demand for medication requests and deliveries which resulted in lengthy delays for people receiving essential medication.

Our support hub teams came together to manage incoming enquiries and we were quickly contacted by local supermarkets, caterers and members of the public who wanted to donate food and supplies to assist those people who were struggling to shop for themselves or were unable to go out.

We delivered emergency food parcels and coordinated volunteers to collect and deliver medication. After a few weeks, the local authorities stepped in to manage the hub so they could support a wider range of people within the community including families and those people who were advised to shield.

Age UK Barrow felt it was time to reopen Lakeland House and quickly became a central point of contact for enquiries and support for older people within the community.

We responded to demand from the general public and listened to what they needed. We created emergency food parcels that were specifically tailored for older people who may be living alone or had specific dietary requirements. We worked closely with our local foodbank and community champions from local supermarkets who supplied us with items to include such as tinned meat, vegetable, cereals and toiletries.

Older people who were already isolated felt even more so during lockdown and the effects of loneliness and social isolation were starting to impact on peoples wellbeing. We started to offer a telephone befriending service and quickly established a team of volunteers to call service users on a regular basis to make sure they were ok, have a friendly chat and keep their spirits up.

Other new services included a free hot meal delivery service to clients twice each week, as well as prescription collection, hearing aid battery delivery and our usual information and advice service which was increasing in demand.

Not only did we provide practical support, we also provided very much needed emotional support to older people who now had very little contact with the outside world.

Telephone Befriending Service



At the beginning of the pandemic, many people were advised to shield and stay at home.

We saw an increase in the number of older people who quickly became isolated and were struggling with the effects of loneliness. A lot of our service users who were so used to attending our regular social groups and activities, were missing contact with their friends and being part of a group.

In order to support our regular service users and maintain contact, we launched a telephone befriending service.

The aim of the service was to provide older people with a telephone call from a volunteer several times each week.

Volunteers were matched with a client and would call them on a regular basis for a general, friendly chat.

We were able to secure funding from the National Lottery Community Support Fund and Cumbria Community Foundation, which enabled us to employ two part time coordinators, purchase mobile telephones and data for the befriending volunteers to allow them to make calls to their clients.

People who were unable to work or had been placed on furlough, wanted to help to support their local community.

We were really overwhelmed with the offers of support and as a result, many people dedicated their time to become a telephone befriending volunteer.

A total of 64 people gave up their time to make regular calls to support older people.

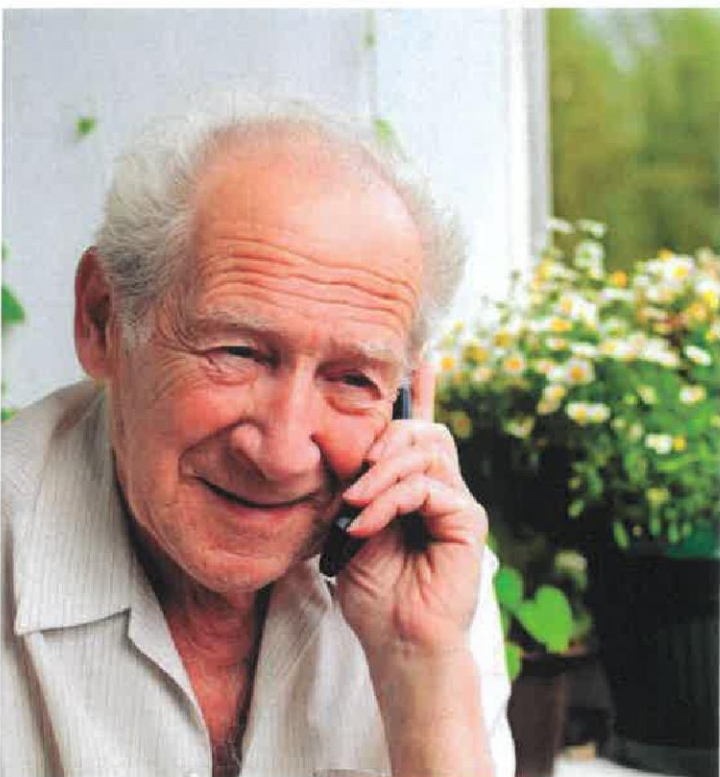


Mr D's Story

A 62-year-old gentleman was referred into the Telephone Befriending Service by the local Mental Health Team. Mr D lives alone and had recently been diagnosed with a mental illness and neurosis.

During the initial assessment with our telephone befriending coordinator, the client disclosed he was of very low mood and struggled with a number of complex health issues. It was felt that it was not appropriate for this client to be called by a volunteer so was supported by our telephone befriending coordinator. He had been discharged from mental health services but still needed some contact and support. The coordinator agreed to monitor the client and refer back to Adult Social Care if needed.

Mr D had limited contact with his family, who live out of town. He struggles with health issues and has recently lost childhood friends. He does however, have one good friend who is able to take him to some clinics and appointments.



Previously, Mr D did attend some activities, including a cooking club, but unfortunately, his health problems prevented from staying longer than half an hour and he stated he was embarrassed. He does like cooking and often asks for tips on how to cook things at home.

During his calls with the befriending coordinator, Mr D would often reminisce about living in Barrow including talking about people he knew and what was going on in the town at the time.

Recently he has needed a lot of support from various professionals and the voluntary sector as his needs are very complex. He has approached Age UK Barrow in the past for help.

The lockdown period was a particularly difficult time and he felt he needed more support to prevent a further episode of mental ill health.

The regular befriending calls have been of great benefit and Mr D will contact the telephone coordinator with updates about appointments and to generally talk and reminisce, rather than struggling with isolation and feeling low.

Since his initial referral, Mr D has accessed many other services from Age UK Barrow, such as being supplied with emergency food parcels and was given the telephone number for a local supermarket who provided a personal, doorstep shopping service. They now call him regularly, to ensure he gets a shopping order when needed to maintain a healthy and well balanced diet. Mr D was also eligible for some funding from the local council fund which was being administered by Age UK Barrow and as a result, was able to purchase a new bed and mattress when his had broken.

Mr D - Client Feedback

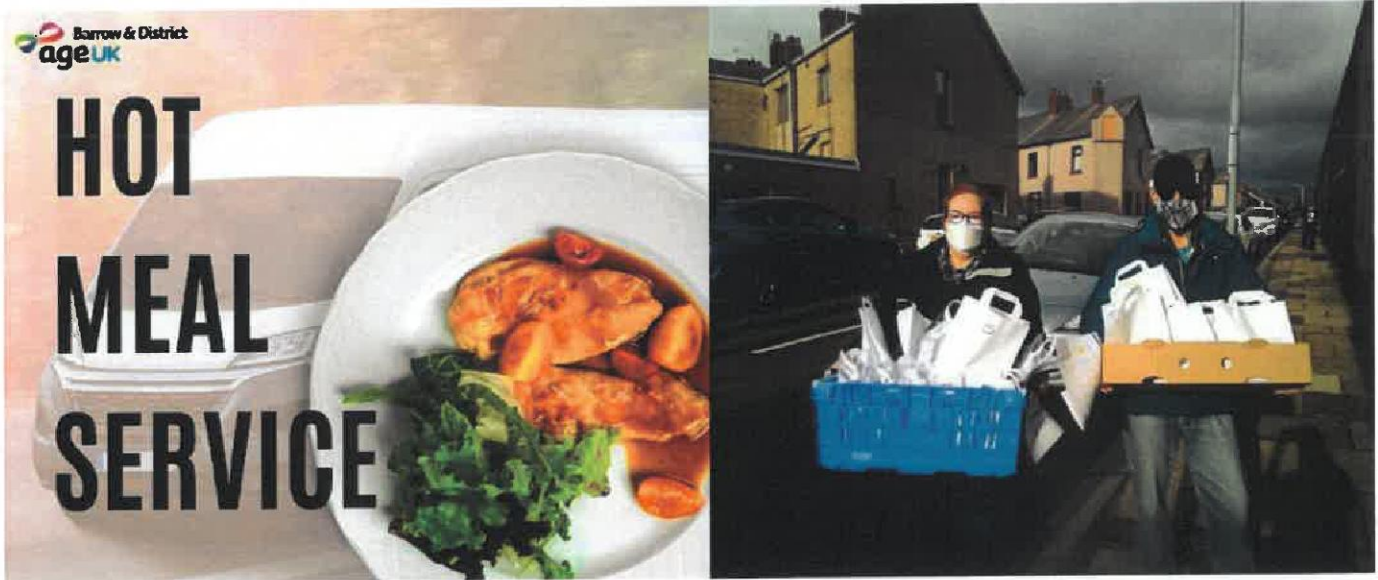
We asked Mr D what he felt about the help and support he had received from Age UK Barrow. He told us that during lockdown "I was going off my head" as all his services were difficult to contact for support. He had also been sleeping on a broken mattress and having a bad back too was not helping so getting the new mattress "really helped".

One of the things he also could not access easily was a food shop and was reliant on his friend taking him but having his food shop ordered and delivered via the local supermarket service was "a huge help and also helped me remain within a budget"

We asked how the regular calls from our befriending coordinator had helped him and he said "I would recommend it to anyone and I really looked forward to chatting". He said "it helped me to see things from a different angle and I felt better knowing I was going to receive a call that day"



Hot Meal Deliveries



At the beginning of the pandemic, we were contacted by a local catering firm who wanted to donate fresh, home cooked, hot meals to older people who were living in the community. Each week, Shepherd's in Barrow catered for over 100 elderly people who were struggling to cook for themselves or get out for shopping and food supplies.

We became aware that many people didn't eat particularly well and have limited cooking facilities and abilities. Clients told us they were surviving on biscuits and tinned goods, without managing to cook a hot meal for themselves.

The meals were a great support to people and ensured clients were receiving a hot, balanced meal at least twice a week.

Delivering the meals, also gave us the opportunity to check on peoples general wellbeing and make sure our clients were ok.

Our hot meal volunteers had the same delivery route each week so they built up a great relationship with each client. They would take the time to have a chat on the doorstep and make sure they had everything they needed and were generally ok.

It was lovely for clients to see a friendly, familiar face each week and have some social contact as most, quite often would go days without seeing anyone.

Mr B's Story



Mr B is 75 years old and lives alone. His daughter had noticed an advert for the hot meal service on our social media pages and persuaded her father to try it.

Mr B is a particularly independent gentleman who sadly lost his wife a few years ago. His wife's funeral was costly and he was existing on cups of tea and toast for his daily meals. He told us that receiving the hot meals twice weekly was 'sublime' and said they had been 'a godsend'

Mr B went on to say that the meals felt like they gave some point to his life, he has very little contact with people and doesn't go out. He was travelling to Manchester regularly for preventative cancer treatment and he would look forward to the meal being there when he got back from hospital.

G, Mr B's regular volunteer, received a special mention as he would stop and have a chat each week with him when he delivered his meal.

Having been a submariner for 16 years, Mr B said he was not fussy about food but the meals provided by Shepherds each week were excellent.

He expressed a fondness for Cumberland sausage and commented that he was very grateful to Shepherds for the wonderful food.

Mr B said he could never thank Age UK Barrow and District enough.

Hot Meal Deliveries

15 Hot Meal Delivery
volunteers

6665

Total number of Meals
delivered

120

clients received a free,
hot meal twice a week



Food Donations



People struggled to access basic food supplies due to them either shielding or not being physically able to leave the house.

Many had family members who would usually do their shopping for them but were having to self isolate due to contracting Covid.

Older people didn't have the facilities to be able to shop online and if they could, delivery slots were booked up weeks in advance.

People received basic small food parcels from local support hubs and the authorities, but we found they didn't necessarily suit the dietary requirements or appetites of older people.



Age UK Barrow tailored food parcels to suit older people, their dietary requirements, appetite and cooking facilities at home. Each incoming referral would be assessed and discussed with the clients and we would ensure the contents of the box were packed individually to meet their needs as best as we could.

The support and donations from members of the public were wonderful and we received large quantities of food, toiletries and money to purchase supplies.

Staff from local businesses raised money from within their teams to donate to us to buy food items for our parcels. One of the local windfarm teams even paid for home-cooked frozen meals from a local Michelin star restaurant!

Food Parcels Delivered

Whilst we were supplying food parcels for people who were struggling to get out, we felt it was important to look at how people were going to manage once the Covid pandemic was over and life slowly started to return to normal.

We carried out full benefit checks for all clients obtaining food parcels and reviewed their income and expenditure. Some people were entitled to benefits and saw their weekly income increase.



We delivered a total of 1,800 free food parcels



Over 200 clients received food parcels on a regular basis throughout the pandemic

Our food parcels were tailored to peoples cooking abilities and facilities at home. We wanted to include items and ingredients that would be easy to make meals from whilst trying to ensure they were well balanced and included fruit, vegetables and tinned meat or fish.

We also included basic household essentials such as washing powder, toiletries, tea, sugar and cereals.

Celebrations and Support

Despite the global pandemic and the country being in lockdown, we felt we had to keep spirits up and did everything we could to keep clients smiling .

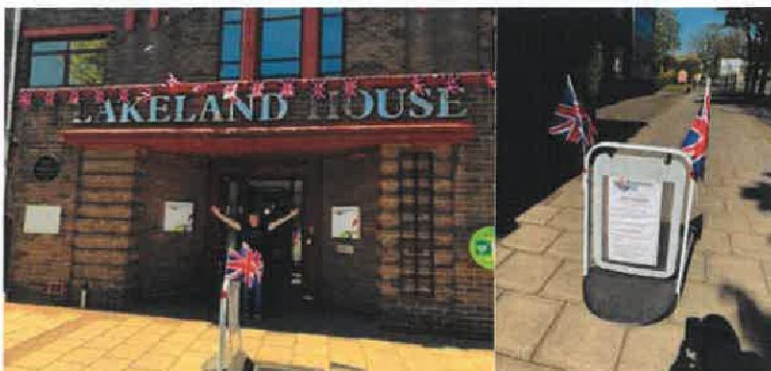
Easter

We received a large donation of Easter Eggs from our local Morrisons supermarket which were delivered to clients by our team of volunteers



VE Day

Despite being in lockdown, we still joined in the celebrations!



CHRISTMAS

We ran a Christmas card competition and involved a local primary school. We asked the children to design a Christmas card and the winner would have their design printed onto a card which would be included in the wellbeing hampers being sent out to clients.

A local discount warehouse also organised customer collections and donated 25 hampers to be delivered.



Celebrations and Support

VALENTINES DAY

20 valentines day goody bags were sent out to share the love and kindness of donations that were brought in by members of the public and donated by local stores and supermarkets.



Awards & Recognition

Our new services were in great demand so we quickly established a team of volunteers to help us deliver them.

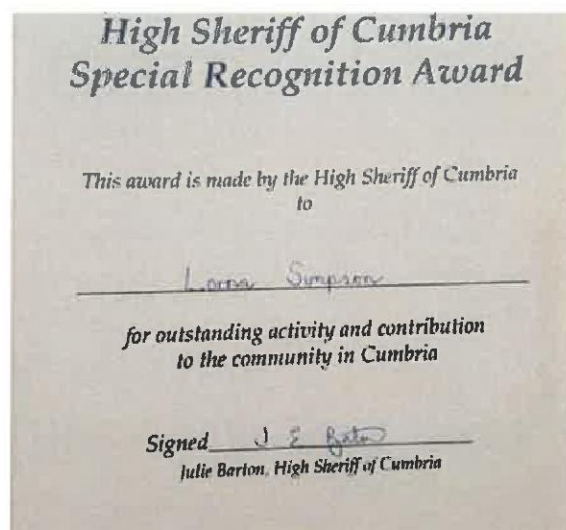
Volunteers were on hand everyday to get essential supplies out to people who needed them.

Our valiant efforts were recognised within the community and very soon our team of volunteers were rewarded for their efforts.

High Sherriff of Cumbria Award

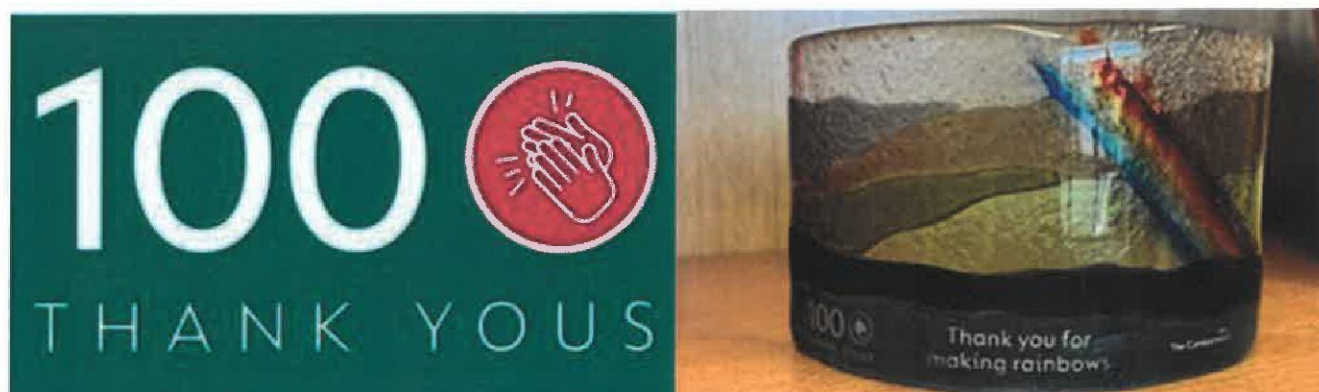
We were the first local charity to receive recognition for our volunteers as a whole from the High Sherriff of Cumbria and were very fortunate to be presented with an award.

Julie Barton, High Sherriff of Cumbria, attended Lakeland House to meet some of our dedicated volunteers and present certificates. She spoke to them all to find out a little bit more about their roles and experiences.



The Cumberland Building Society

- 100 Thank You's Award



The Cumberland Building Society launched a campaign to find 100 people across the region who symbolised the extraordinary response throughout the Covid-19 crisis.

They said they were deeply impressed by the way local communities had risen to the challenge and the acts of kindness that were seen in all walks of life.

They asked for the general public to nominate people they could recognise with a public thank you so that in future years people could look back and see how our communities coped with the historic challenge.

Tom Little, who ran the campaign, said: "We wanted to say thank you by telling the stories of 100 people from across our region who have gone the extra mile to help during this crisis. Their contribution was great, such as our amazing nurses and care home staff, or smaller, such as ordinary people who stepped up to help a neighbour. "It could be saving lives, or simple acts of kindness which made the difference to someone in difficulty"

"We wanted to highlight 100 of them to help us tell the story of our region's response. They represented everyone who had made the fightback a great community effort.

"We have not been defeated by coronavirus. Though much remains to be done, our determination to work together and look after each other will help us prevail. Our 100 Thank You's is a salute to that."

Age UK Barrow & District received a nomination and were extremely proud to have received the award for our efforts and services throughout the pandemic.

Volunteers



Our volunteers play a huge role in helping us to deliver vital services and they are an essential part of the Age UK team.

We have always had a great team of volunteers who regularly attended groups and activities and supported clients. Those volunteers still wanted to help during lockdown so many took on roles as telephone befrienders and helping with deliveries.

Other people who were placed on furlough or unable to work, approached us to ask what they could do to help and we quickly recruited over 60 new volunteers. New volunteers were placed into a variety of roles such as telephone befriending, hot meal delivery drivers or helping to deliver food parcels and medication.

The benefits of volunteering can have a major positive impact on peoples wellbeing and make them feel they are contributing to the community, which was a great way to support people who were struggling with the effects of not being able to go about their day to day life. A lot of new volunteers told us that volunteering was something they had never considered before but is definitely something they would carry on and do as they would love to help out.

Client and Volunteer Feedback

At the beginning of the pandemic in March last year, one female volunteer joined our befriending team and was assigned several clients, some of whom had quite complex backgrounds and needs. She makes regular calls to support our clients whilst managing her busy homelife, including caring for grown up children with additional needs.

This volunteer alerted us to one of her clients who became quite poorly during one of her telephone calls. The volunteer called for an ambulance and the client was diagnosed with a severe case of pneumonia which could have been fatal had the client not received immediate, urgent help.

This volunteer also supports another client whose husband is 66 years of age and has a severe form of dementia. On speaking to the client, she says she 'couldn't have managed without her befrienders support'. She described her as 'wonderful and kind and her rock'

As her husband's dementia is so severe, it can sometimes be difficult to talk via the telephone so her volunteer will communicate via text message and will regularly send a courtesy message to see if she is ok. The client says 'she feels like her volunteer has become a part of their family and has been on the journey with them 'She is hoping to meet face to face as soon as lockdown restrictions ease. This client has said she 'can't thank Age UK Barrow & District for everything we do'

Babs' Story - Volunteer



Hi my name is Babs and I am a Befriending volunteer at Age UK Barrow and District. I started volunteering about 14 months ago at the start of the pandemic.

Age UK were advertising for telephone befrienders to help support people through the loneliness. The pandemic had caused many older people to become more isolated and in need of someone to talk to.

Initially it was arranged it would be a 15 minute phone call per client but as I started to phone the people I had been allocated it soon became much longer. The topics we cover are immense. We talk about family, growing up, work history, marriage, holidays and much more.

The advantage of ringing the same people each week means we can follow up from the conversation we had with them the previous week. If they are experiencing any problems or worries we can see if they have managed to get them resolved. We can offer them more support from Age UK and signpost them to members of staff who can help them further.

The disadvantage of ringing the same person every week is you do worry about them and want to help them through their difficult times. I do however have great support from the telephone befriending coordinators who are there to support me with any worries I have.

I enjoy volunteering because I enjoy helping others. I like to put a smile on people's faces and want them to know that there is people who care about them.

I would definitely recommend volunteering to anyone and urge them not to wait. Do it today! You won't regret it!

Funding & Grants

National Lottery Community Fund

We have had a very successful year with project bids and funding applications to allow us to deliver services relating to covid support and future recovery. Without funding, we would have been unable to run projects and deliver



We support people and communities to thrive.
The National Lottery Community Fund

The National Lottery Community Fund

We received £55,862 from the Coronavirus community support fund which enabled us to appoint key members of staff to coordinate the following services.

- Telephone Befriending
- Hot Meal Delivery Service Community Support
- Food Parcels
- Prescription collection & delivery

Age UK

£32,543.24 was received to support with central running costs and also enabled us to increase the hot meal delivery to two days each week.



Cumbria Community Foundation

CCF awarded us a total of £46,672.56 this year to enable us to run multiple projects including:

- Hot Meal Delivery Service
- Telephone Befriending
- Purchase essential IT equipment to enable staff to work from home.

Without this funding, we wouldn't have been able to deliver these essential services.

Cumbria COVID-19 Response Fund - £19,671 Covid financial support project Supported the delivery of our information and advice service.



CUMBRIA
COMMUNITY FOUNDATION

LRF Collaborative Project

Digital inclusion Project - £16,801.56

We submitted a collaborative bid with the local resilience forum to launch a Digital Inclusion Project. We recognised that many people didn't have the equipment, skills or knowledge to connect online. We appointed a technical coordinator and digital activities manager to run the project and show people how to use ipads and tablets to be able to connect with friends and get online.

We trained volunteers to become digital champions and they now see clients in the community for one to one sessions each week.



Funding & Grants

As a result of receiving the funding from The National Lottery, we were able to help many people including Mrs E.

Mrs E is an 81-year-old lady who had used our services over the years including help to obtain a Blue Badge and our Handyperson service. She is usually a very nervous person, not very sociable and doesn't like asking for help. As she received such a 'brilliant service' with the blue badge and grab rails, she said it gave her the confidence to phone us for help with her prescription collection at the start of the pandemic.

We initially started to collect her prescription on a regular basis and deliver to her house when she required her monthly medication.

She was shielding, has no family members living locally and was struggling to obtain essential food shopping. We provided regular food parcels and eventually signposted her to a local supermarket who offered a doorstep delivery service.

Her family would often encourage her to ask for support and were frustrated that she didn't accept help. She said that 'her family were over the moon' knowing that Age UK Barrow were there to support her and provide hot meals, help her with her medication and supply food parcels.

She was lonely and isolated and felt she didn't have much purpose. We mentioned to her, during a routine telephone conversation, that we were looking for people with knitting and crocheting skills to help with our Age UK Big Knit campaign which involved knitting small hats to go onto smoothie bottles to sell in supermarkets.

She has gone on to establish a great rapport with our staff, she hadn't done any knitting for years and has gone on to knit over 1500 smoothie hats for us.

She feels, by knitting the hats, she is able to contribute and it's her way of giving something back to Age UK.

She has said her confidence has increased as we have supported her in a way that has made her feel included and given her a sense of purpose.

She can't thank us enough for all of the thoughtful care packages and weekly phone calls. She said that 'she is such a solitary soul, and we helped so much during the really dark months of the pandemic'

Mrs S Story

Mrs S received an iPad as a part of the Dignity in Dementia project in 2020, her husband was in a care home, and the iPad enabled her to keep in touch with him. She did also receive weekly support sessions, delivered remotely by Dignity in Dementia.

Mrs S's confidence grew with using the iPad, and she became adept at watching films and tv programmes on the device; she also has a grandson who lives on the other side of the world and is in a band. As a result of her loaning the iPad, she has been able to watch his concerts live on the internet.

As her husband's illness progressed, Mrs S was able to attend multi-disciplinary meetings via Teams and Zoom, and sadly, when her husband passed away in early 2021, she was able to keep in touch with relatives, and continued to receive support from Dignity in Dementia up until the project ended.

Since lockdown restrictions have been lifted, Mrs S was keen to participate in the sessions at Dalton Drill Hall, popping in as and when necessary.

She said that the service offered by Age UK Barrow and District was "fantastic" and that the Technical Coordinator had been "so nice and helpful. It's been handy having a number I could ring, and then Thomasina would be around the corner in half an hour, helping me out"

Mrs S has expressed a desire to continue to loan the iPad, so that she can continue to keep in touch with family and friends, and so that she can continue to make use of the convenience of online shopping.

She feels that she has learnt a lot, and was rightfully proud of herself at being able to participate in important online meeting regarding the care of her late husband, and she feels that the support she received to enable her to do that has been invaluable.



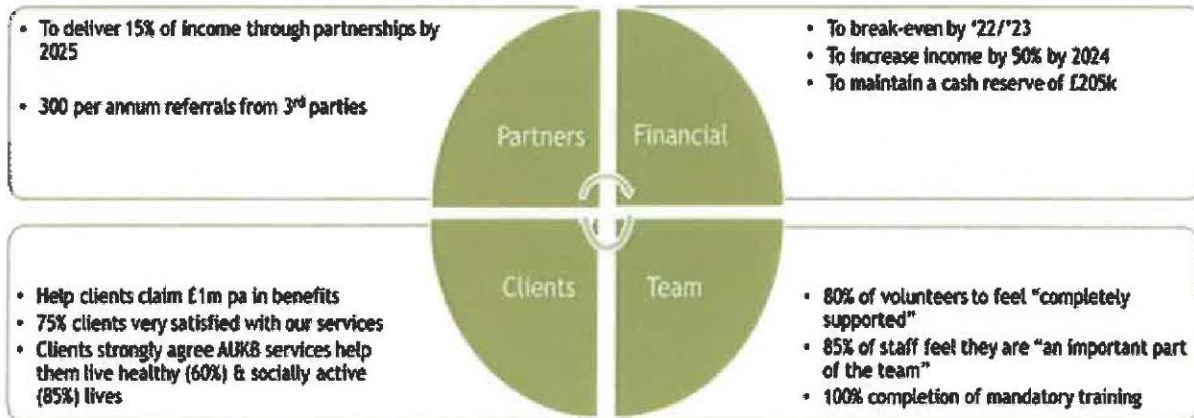
Strategic Priorities

We spent time during the summer reflecting on our performance over previous years and reviewed our current services. We listened to our service users, local authorities and peer organisations to find out what kind of services they felt were needed from Age UK Barrow.

Our Strategic Objectives...



Offering services, support & education to help people in later years live healthy, socialiy active & independent lives



This included where we delivered social groups and activities from, what they were going to be and how we were going to deliver them. We reviewed our strategic objectives and focused on key areas of priority.



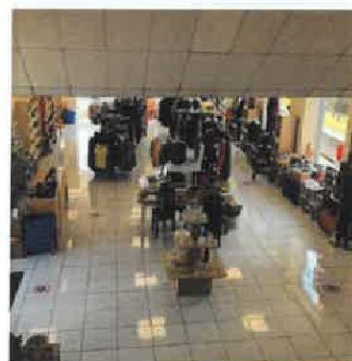
Age UK Charity Shop

It was a difficult year for all retail outlets, in particular, non essential shops. Unfortunately we had to close the doors to our charity shop in April 2020 due to the recommended government guidelines.

We were able to reopen in late summer and welcomed our customers back. We were completely overwhelmed by the generous donations that we received as many people had been having a good sort out during lockdown. Our dedicated volunteers missed being in the shop during lockdown and were so happy when we reopened. One volunteer said "I absolutely love being in the shop, it really does lift me right up"

Sue, our shop manager did a wonderful job of organising and sorting through all of the donations that came in and ensured customers, staff and volunteers followed the Covid safety guidelines.

After a successful, busy summer and autumn period, we were once again, faced with closure when the country went into it's second lock down period during the winter.



Age UK Charity Shop



Whilst the shop was closed, it gave us the opportunity to re evaluate our current premises and location.

We wanted to expand our floorspace and the type of goods we sold to include white goods and larger furniture items.

After more than 15 years of trading from Rawlinson Street, we felt it was time to move on. We found an ideal shop in a prominent location with free parking and plenty of open floorspace and storage. After we closed our doors in December 2020, we packed up all of our stock and prepared the new premises to re open in May 2021.

We had a wonderful customer base at Rawlinson and we hope that everyone will embark on our new journey with us and enjoy the new shop and premises with the same dedicated and friendly staff and volunteers.

Our new shop is located on the corner of Wilkie Road and Walney Road.

Administrative Information

Trustees

Stephen Harris – Chair (Resigned 24.6.21)

Martin Pettifor - From 29.5.20

Richard Cupid

Oliver Pearson

Sue Ferm – from 22.4.20

Richard Spenceley - From 8.4.21

Chief Executive

Mrs Teri Stephenson (Consultant)

Management Team

Vickie Martin, Head of Age UK Barrow

Marie Connor, Information & Advice Manager

Thomasina McNaughton, Age Works Manager

Sue Gibbons, Retail Manager

Staff Team

Helen Forrest, Information & Advice Officer

Alan Peter, Management Accountant

Steven Wise, Consultant Management Accountant

Donna Brown, Admin Assistant

Jackie Hyles, RespectAbility Coordinator

Sharon Tucker, RespectAbility Coordinator

Tracey Schofield, Age Works Project Worker

Lisa Cooke, Age Works Project Worker

Staci Fish, Receptionist

Selwyn Wright, Outreach Worker

Jill Thompson, Domestic Assistant

Jackie Gower, Deputy Retail Manager

Lorna Simpson - Community Support Officer

Carolyn Hodgson - Admin Support

Principal Charity Office

Lakeland House, Abbey Road

Barrow in Furness, Cumbria, LA14 1XL

Registered Company Number

08224619 (England and Wales)

Registered Charity Number

1149975

Bank – CAF Bank

AGE UK BARROW AND DISTRICT LIMITED

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

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 2021. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP FRS102) "Accounting and Reporting by Charities" issued in January 2019.

The Trustees are pleased to present their report together with the financial statements of the Charity for the 12 months ending 31st March 2021.

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".

AGE UK BARROW AND DISTRICT LIMITED

REPORT OF THE TRUSTEES **FOR THE YEAR ENDED 31 MARCH 2021**

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

AGE UK BARROW AND DISTRICT LIMITED

REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2021

Registered office

Lakeland House
Abbey Road
Barrow-in-Furness
Cumbria
LA14 1XL

Trustees

S Harris Project Engineer (resigned 24/6/2021)
O Pearson Independent Advocate
R Cupid Duty Officer
Mrs S M Fern Consultant (appointed 22/4/2020)
M Pettifor Director (appointed 29/5/2020)
R W Spenceley (appointed 8/4/2021)

Independent Examiner

R F Miller & Co. Ulverston
Bellevue
Princes St
Ulverston
Cumbria
LA12 7NB

Approved by order of the board of trustees on 22 October 2021 and signed on its behalf by:



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 2021.

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 registered member of ACA 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.



Paul Charles Newsham
ACA

22 October 2021

AGE UK BARROW AND DISTRICT LIMITED

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2021

	Notes	Unrestricted funds £	Restricted funds £	2021 Total funds £	2020 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies	2	251,233	110,735	361,968	224,438
Other trading activities	3	38,700	1,270	39,970	70,565
Investment income	4	<u>100</u>	<u>-</u>	<u>100</u>	<u>(419)</u>
Total		290,033	112,005	402,038	294,584
 EXPENDITURE ON					
Raising funds	5	92,880	23,825	116,705	73,523
Charitable activities					
Charitable activities	6	186,977	318,849	505,826	335,582
Total		279,857	342,674	622,531	409,105
Net gains/(losses) on investments		<u>-</u>	<u>-</u>	<u>-</u>	<u>(19,889)</u>
NET INCOME/(EXPENDITURE)		10,176	(230,669)	(220,493)	(134,410)
Transfers between funds	15	<u>156,838</u>	<u>(156,838)</u>	<u>-</u>	<u>-</u>
Net movement in funds		167,014	(387,507)	(220,493)	(134,410)
RECONCILIATION OF FUNDS					
Total funds brought forward		238,754	388,403	627,157	761,567
TOTAL FUNDS CARRIED FORWARD		<u>405,768</u>	<u>896</u>	<u>406,664</u>	<u>627,157</u>

CONTINUING OPERATIONS

The statement of financial activities above shows a deficit in the year of £220,493 and the trustees would like to highlight that, included within this deficit, is an impairment loss of £180,000 recognised in the year on the freehold property held by the charity. The trustees obtained valuations of the property prior to taking the decision to sell which justifies the fair value adjustment made within these accounts. The value prior to the fair value adjustment included a significant amount of historical improvements whose value have diminished over time which has not been reflected in its carrying value.

The property was sold after the year end for its fair value of £180,000 to Barrow Borough Council and is being leased back from them at a nominal rent charge for the subsequent 3 years.

In light of the ongoing uncertainties everyone has faced and are still facing due to the global pandemic, the trustees felt it was in the best interests of the charity to realise the value held within the property in order to ensure funds continue to be available to allow it to serve the community and fulfil its charitable purposes.

The leaseback allows status quo to be maintained in terms of the main base of operations of the charity whilst increasing the funds available to the charity.

The notes form part of these financial statements

AGE UK BARROW AND DISTRICT LIMITED

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2021

The cashflow statement on pages 46 and 47 highlights that the charity used only a minimal amount of its cash to provide its service whilst cash at bank grew by £22,498. This, together with the proceed of the freehold property sale post year end, put the charity in a good position to continue its vital work for the local community going into the 2022 year

AGE UK BARROW AND DISTRICT LIMITED

**BALANCE SHEET
31 MARCH 2021**

	Notes	Unrestricted funds £	Restricted funds £	2021 Total funds £	2020 Total funds £
FIXED ASSETS					
Tangible assets	11	1,022	182,302	183,324	367,424
Investment property	12	-	-	-	50,111
		1,022	182,302	183,324	417,535
CURRENT ASSETS					
Debtors	13	52,724	-	52,724	34,318
Cash at bank and in hand		418,643	(173,169)	245,474	222,976
		471,367	(173,169)	298,198	257,294
CREDITORS					
Amounts falling due within one year	14	(66,619)	(8,239)	(74,858)	(47,672)
NET CURRENT ASSETS		<u>404,748</u>	<u>(181,408)</u>	<u>223,340</u>	<u>209,622</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>405,770</u>	<u>894</u>	<u>406,664</u>	<u>627,157</u>
NET ASSETS		<u>405,770</u>	<u>894</u>	<u>406,664</u>	<u>627,157</u>
FUNDS	15				
Unrestricted funds				405,770	238,754
Restricted funds				894	388,403
TOTAL FUNDS				<u>406,664</u>	<u>627,157</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 March 2021.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 March 2021 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.

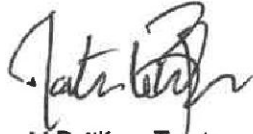
The notes form part of these financial statements

AGE UK BARROW AND DISTRICT LIMITED

BALANCE SHEET - continued
31 MARCH 2021

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 22 October 2021 and were signed on its behalf by:

A handwritten signature in black ink, appearing to read 'M Pettifor', written in a cursive style.

M Pettifor - Trustee

The notes form part of these financial statements

AGE UK BARROW AND DISTRICT LIMITED

CASH FLOW STATEMENT
FOR THE YEAR ENDED 31 MARCH 2021

	Notes	2021 £	2020 £
Cash flows from operating activities			
Cash generated from operations	1	<u>(7,824)</u>	<u>(121,688)</u>
Net cash used in operating activities		<u>(7,824)</u>	<u>(121,688)</u>
Cash flows from investing activities			
Purchase of tangible fixed assets		-	(7,325)
Sale of investment property		30,222	-
Interest received		<u>100</u>	<u>881</u>
Net cash provided by/(used in) investing activities		<u>30,322</u>	<u>(6,444)</u>
Change in cash and cash equivalents in the reporting period		<u>22,498</u>	<u>(128,132)</u>
Cash and cash equivalents at the beginning of the reporting period		<u>222,976</u>	<u>351,108</u>
Cash and cash equivalents at the end of the reporting period		<u>245,474</u>	<u>222,976</u>

The notes form part of these financial statements

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE CASH FLOW STATEMENT
FOR THE YEAR ENDED 31 MARCH 2021**

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

	2021 £	2020 £
Net expenditure for the reporting period (as per the Statement of Financial Activities)	(220,493)	(134,410)
Adjustments for:		
Depreciation charges	3,373	4,319
Losses on investments	-	19,889
Loss on disposal of fixed assets	727	-
Interest received	(100)	(881)
Impairment of Freehold property	180,000	-
Realised loss on investment	19,889	-
Increase in debtors	(18,406)	(15,888)
Increase in creditors	<u>27,186</u>	<u>5,283</u>
Net cash used in operations	<u>(7,824)</u>	<u>(121,688)</u>

2. ANALYSIS OF CHANGES IN NET FUNDS

	At 1/4/20 £	Cash flow £	At 31/3/21 £
Net cash			
Cash at bank and in hand	<u>222,976</u>	<u>22,498</u>	<u>245,474</u>
	<u>222,976</u>	<u>22,498</u>	<u>245,474</u>
Total	<u>222,976</u>	<u>22,498</u>	<u>245,474</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 2021**

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, as modified by the revaluation of certain assets.

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.

INVESTMENT PROPERTY

Investment property is shown at most recent valuation. Any aggregate surplus or deficit arising from changes in fair value is recognised in the Statement of Financial Activities.

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 2021**

2. DONATIONS AND LEGACIES		
	2021	2020
	£	£
Donations	11,152	8,007
Gift aid	-	18,722
Grants	<u>350,816</u>	<u>197,709</u>
	<u>361,968</u>	<u>224,438</u>
Grants received, included in the above, are as follows:		
	2021	2020
	£	£
Other grants	<u>350,816</u>	<u>197,709</u>
3. OTHER TRADING ACTIVITIES		
	2021	2020
	£	£
Fundraising events	1,690	1,520
Shop income	33,334	48,684
Leisure activities	-	790
Support service charges	4,859	18,530
Alarm charges	-	875
Insurance commission	<u>87</u>	<u>166</u>
	<u>39,970</u>	<u>70,565</u>
4. INVESTMENT INCOME		
	2021	2020
	£	£
Rents received	-	(1,300)
Deposit account interest	<u>100</u>	<u>881</u>
	<u>100</u>	<u>(419)</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2021**

5. RAISING FUNDS

RAISING DONATIONS AND LEGACIES

	2021	2020
	£	£
Furniture collection	<u>-</u>	<u>950</u>

OTHER TRADING ACTIVITIES

	2021	2020
	£	£
Purchases	-	32
Cost of services provided	51,758	13,187
Support costs	<u>64,947</u>	<u>59,354</u>
	<u>116,705</u>	<u>72,573</u>
 Aggregate amounts	 <u>116,705</u>	 <u>73,523</u>

6. CHARITABLE ACTIVITIES COSTS

	Support costs (see note 7)
	£
Charitable activities	<u>505,826</u>

7. SUPPORT COSTS

	Management	Finance	Information technology	Governance costs	Totals
	£	£	£	£	£
Other trading activities	63,541	216	-	1,190	64,947
Charitable activities	<u>270,666</u>	<u>187,173</u>	<u>233</u>	<u>47,754</u>	<u>505,826</u>
	<u>334,207</u>	<u>187,389</u>	<u>233</u>	<u>48,944</u>	<u>570,773</u>

8. NET INCOME/(EXPENDITURE)

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

	2021	2020
	£	£
Depreciation - owned assets	3,373	4,319
Deficit on disposal of fixed assets	<u>727</u>	<u>-</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2021**

9. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2021 nor for the year ended 31 March 2020.

TRUSTEES' EXPENSES

There were no trustees' expenses paid for the year ended 31 March 2021 nor for the year ended 31 March 2020.

10. STAFF COSTS

	2021	2020
	£	£
Wages and salaries	217,281	225,820
Social security costs	14,899	12,310
Other pension costs	<u>11,131</u>	<u>11,766</u>
	<u>243,311</u>	<u>249,896</u>

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

	2021	2020
Management and admin	3	3
Charitable activities	9	10
Cost of generating funds	<u>2</u>	<u>2</u>
	<u>14</u>	<u>15</u>

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

11. TANGIBLE FIXED ASSETS

	Freehold property £	Plant and machinery £	Fixtures and fittings £	Totals £
COST				
At 1 April 2020	360,000	40,840	2,685	403,525
Disposals	-	(1,131)	-	(1,131)
Impairments	<u>(180,000)</u>	-	-	<u>(180,000)</u>
At 31 March 2021	<u>180,000</u>	<u>39,709</u>	<u>2,685</u>	<u>222,394</u>
DEPRECIATION				
At 1 April 2020	-	34,223	1,878	36,101
Charge for year	-	3,333	40	3,373
Eliminated on disposal	-	<u>(404)</u>	-	<u>(404)</u>
At 31 March 2021	-	<u>37,152</u>	<u>1,918</u>	<u>39,070</u>
NET BOOK VALUE				
At 31 March 2021	<u>180,000</u>	<u>2,557</u>	<u>767</u>	<u>183,324</u>
At 31 March 2020	<u>360,000</u>	<u>6,617</u>	<u>807</u>	<u>367,424</u>

AGE UK BARROW AND DISTRICT LIMITED

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2021

11. TANGIBLE FIXED ASSETS - continued

The freehold property has been carried at its cost value with a revaluation of £9,023 undertaken in the year ended 31 March 2017. The property has been sold since the year end at a value of £180,000 and therefore an impairment adjustment of £180,000 has been included this year to show the property at its fair value.

12. INVESTMENT PROPERTY

	£
FAIR VALUE	
At 1 April 2020	50,111
Disposals	<u>(50,111)</u>
At 31 March 2021	-
NET BOOK VALUE	
At 31 March 2021	<u>-</u>
At 31 March 2020	<u>50,111</u>

13. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021	2020
	£	£
Trade debtors	22,163	(995)
Other debtors	227	227
VAT	644	1,732
Prepayments	<u>29,690</u>	<u>33,354</u>
	<u>52,724</u>	<u>34,318</u>

14. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021	2020
	£	£
Trade creditors	(6,356)	4,085
Social security and other taxes	8,243	3,916
Other creditors	262	20
Wages control account	14,193	-
Accrued expenses	<u>58,516</u>	<u>39,651</u>
	<u>74,858</u>	<u>47,672</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2021**

15. MOVEMENT IN FUNDS

	At 1/4/20 £	Net movement in funds £	Transfers between funds £	At 31/3/21 £
Unrestricted funds				
General fund	51,167	23,855	75,810	150,832
Charitable Trading	-	(26,028)	26,028	-
Advice Services	37,747	19,722	-	57,469
Robin House Development Services	125,000	-	(125,000)	-
Lakeland	24,840	(7,371)	-	17,469
	<u>-</u>	<u>-</u>	<u>180,000</u>	<u>180,000</u>
	238,754	10,178	156,838	405,770
Restricted funds				
Lakeland	360,000	(180,000)	(180,000)	-
Age Works	28,403	(19,681)	(8,722)	-
Respectability	-	(25,206)	25,206	-
Remote Dementia Support Project	-	(285)	285	-
Virtual Project	-	894	-	894
The National Lottery Fund - COVID Support Project	-	(6,393)	6,393	-
	<u>-</u>	<u>(6,393)</u>	<u>6,393</u>	<u>-</u>
	388,403	(230,671)	(156,838)	894
TOTAL FUNDS	<u>627,157</u>	<u>(220,493)</u>	<u>-</u>	<u>406,664</u>

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

	Incoming resources £	Resources expended £	Gains and losses £	Movement in funds £
Unrestricted funds				
General fund	91,215	(67,360)	-	23,855
Charitable Trading	31,896	(57,924)	-	(26,028)
Advice Services	162,061	(142,339)	-	19,722
Services	4,861	(12,232)	-	(7,371)
	290,033	(279,855)	-	10,178
Restricted funds				
Lakeland	-	(180,000)	-	(180,000)
Age Works	36,064	(55,745)	-	(19,681)
Respectability	1,271	(26,477)	-	(25,206)
Remote Dementia Support Project	12,300	(12,585)	-	(285)
Virtual Project	4,801	(3,907)	-	894
The National Lottery Fund - COVID Support Project	57,569	(63,962)	-	(6,393)
	<u>112,005</u>	<u>(342,676)</u>	<u>-</u>	<u>(230,671)</u>
TOTAL FUNDS	<u>402,038</u>	<u>(622,531)</u>	<u>-</u>	<u>(220,493)</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2021**

15. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1/4/19 £	Net movement in funds £	Transfers between funds £	At 31/3/20 £
Unrestricted funds				
General fund	187,918	(145,585)	8,834	51,167
Charitable Trading	-	(9,840)	9,840	-
Advice Services	29,915	(40,307)	48,139	37,747
Robin House Development Services	125,000	-	-	125,000
	<u>24,741</u>	<u>3,634</u>	<u>(3,535)</u>	<u>24,840</u>
	367,574	(192,098)	63,278	238,754
Restricted funds				
Lakeland	360,000	-	-	360,000
Age Works	31,362	75,302	(78,261)	28,403
Cancer Support	2,631	6,000	(8,631)	-
Respectability	-	(23,614)	23,614	-
	<u>393,993</u>	<u>57,688</u>	<u>(63,278)</u>	<u>388,403</u>
TOTAL FUNDS	<u>761,567</u>	<u>(134,410)</u>	<u>-</u>	<u>627,157</u>

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

	Incoming resources £	Resources expended £	Gains and losses £	Movement in funds £
Unrestricted funds				
General fund	13,137	(138,833)	(19,889)	(145,585)
Charitable Trading	50,431	(60,271)	-	(9,840)
Advice Services	31,574	(71,881)	-	(40,307)
Services	18,324	(14,690)	-	3,634
	113,466	(285,675)	(19,889)	(192,098)
Restricted funds				
Age Works	148,380	(73,078)	-	75,302
Cancer Support	6,000	-	-	6,000
Respectability	26,738	(50,352)	-	(23,614)
	<u>181,118</u>	<u>(123,430)</u>	<u>-</u>	<u>57,688</u>
TOTAL FUNDS	<u>294,584</u>	<u>(409,105)</u>	<u>(19,889)</u>	<u>(134,410)</u>

AGE UK BARROW AND DISTRICT LIMITED

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2021**

15. MOVEMENT IN FUNDS - continued

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

	At 1/4/19 £	Net movement in funds £	Transfers between funds £	At 31/3/21 £
Unrestricted funds				
General fund	187,918	(121,730)	84,644	150,832
Charitable Trading	-	(35,868)	35,868	-
Advice Services	29,915	(20,585)	48,139	57,469
Robin House Development Services	125,000 24,741	- (3,737)	(125,000) (3,535)	- 17,469
Lakeland	-	-	180,000	180,000
	367,574	(181,920)	220,116	405,770
Restricted funds				
Lakeland	360,000	(180,000)	(180,000)	-
Age Works	31,362	55,621	(86,983)	-
Cancer Support	2,631	6,000	(8,631)	-
Respectability	-	(48,820)	48,820	-
Remote Dementia Support Project	-	(285)	285	-
Virtual Project	-	894	-	894
The National Lottery Fund - COVID Support Project	-	(6,393)	6,393	-
	393,993	(172,983)	(220,116)	894
TOTAL FUNDS	761,567	(354,903)	-	406,664

AGE UK BARROW AND DISTRICT LIMITED

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2021

15. MOVEMENT IN FUNDS - continued

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 £	Gains and losses £	Movement in funds £
Unrestricted funds				
General fund	104,352	(206,193)	(19,889)	(121,730)
Charitable Trading	82,327	(118,195)	-	(35,868)
Advice Services	193,635	(214,220)	-	(20,585)
Services	<u>23,185</u>	<u>(26,922)</u>	-	<u>(3,737)</u>
	403,499	(565,530)	(19,889)	(181,920)
Restricted funds				
Lakeland	-	(180,000)	-	(180,000)
Age Works	184,444	(128,823)	-	55,621
Cancer Support	6,000	-	-	6,000
Respectability	28,009	(76,829)	-	(48,820)
Remote Dementia Support Project	12,300	(12,585)	-	(285)
Virtual Project	4,801	(3,907)	-	894
The National Lottery Fund - COVID Support Project	<u>57,569</u>	<u>(63,962)</u>	-	<u>(6,393)</u>
	<u>293,123</u>	<u>(466,106)</u>	-	<u>(172,983)</u>
TOTAL FUNDS	<u>696,622</u>	<u>(1,031,636)</u>	<u>(19,889)</u>	<u>(354,903)</u>

16. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2021.

17. 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 2021 there were 5 members. The liability of each member in the event of the company being wound up is £1.

AGE UK BARROW AND DISTRICT LIMITED
DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2021

	2021 £	2020 £
INCOME AND ENDOWMENTS		
Donations and legacies		
Donations	11,152	8,007
Gift aid	-	18,722
Grants	<u>350,816</u>	<u>197,709</u>
	361,968	224,438
Other trading activities		
Fundraising events	1,690	1,520
Shop income	33,334	48,684
Leisure activities	-	790
Support service charges	4,859	18,530
Alarm charges	-	875
Insurance commission	<u>87</u>	<u>166</u>
	39,970	70,565
Investment income		
Rents received	-	(1,300)
Deposit account interest	<u>100</u>	<u>881</u>
	<u>100</u>	<u>(419)</u>
Total incoming resources	402,038	294,584
EXPENDITURE		
Raising donations and legacies		
Furniture collection	-	950
Other trading activities		
Purchases	-	32
Cost of services provided	<u>51,758</u>	<u>13,187</u>
	51,758	13,219
Support costs		
Management		
Wages	217,281	225,820
Social security	14,899	12,310
Pensions	11,131	11,766
Rates and water	97	988
Insurance	6,893	7,353
Light and heat	8,620	11,776
Telephone	6,034	3,461
Postage and stationery	3,557	4,605
Carried forward	268,512	278,079

This page does not form part of the statutory financial statements

AGE UK BARROW AND DISTRICT LIMITED

DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2021

	2021 £	2020 £
Management		
Brought forward	268,512	278,079
Advertising	150	1,203
Sundries	990	771
Rent	9,199	13,800
Repairs/Maintenance Buildings	9,493	12,593
Travelling Costs	2,164	1,353
Cleaning Costs	548	2,219
Equipment Hire	2,544	1,965
Equipment Maintenance	1,743	3,003
Licenses	-	609
Training	35	1,183
Management Charge	1	-
IT	17,478	552
Miscellaneous expenses	2,549	3,270
Class materials	1,781	2,182
Refreshments	-	16
Miscellaneous motor expenses	-	40
Exceptional items	<u>17,020</u>	<u>-</u>
	334,207	322,838
Finance		
Rates and water	2,476	4,898
Bank charges	596	907
PDQ charges	216	-
Fixtures and fittings	40	1,568
Computer equipment	3,334	2,753
Loss on sale of tangible fixed assets	727	-
Impairment losses for tangible fixed assets	<u>180,000</u>	<u>-</u>
	187,389	10,126
Information technology		
Repairs and renewals	233	2,074
Governance costs		
Accountancy and legal fees	<u>48,944</u>	<u>59,898</u>
Total resources expended	<u>622,531</u>	<u>409,105</u>
Net expenditure before gains and losses	(220,493)	(114,521)
Realised recognised gains and losses		
Realised gains/(losses) on investment property	<u>(19,889)</u>	<u>-</u>
Net expenditure	<u>(240,382)</u>	<u>(114,521)</u>

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