South Cumbria age UK
Let's change how we age



2026 annual REPORT

Charity Member Update

WWW.AGEUK.ORG.UK/SOUTHCUMBRIA

South Cumbria age UK
Let's change how we age

About Us

Age UK South Cumbria is an independent charity which has been operating locally in the South Lakes area since 1978 and a brand partner of the national charity Age UK. Our services cover the whole of South Cumbria, and our impact locally is driven by the passion and dedication of our team of 51 staff and 173 volunteers, as well as our ability to raise much needed funds to sustain our work now and into the future.

Sometimes the problems we face in later life can't be tackled on our own. We provide tailored information and one-to-one advice, we advocate for local older people and we do much more, from organising village drop-ins to setting up lunch clubs and working with older people to ensure that they can stay living well at home.

Our purpose is to work with local older people to help them retain independence and exercise real choice in their lives.

Our Goals as a Charity

- Delivering services that help to meet the needs of older people, whatever those needs may be.
- Informing and advising older people of their rights and options.
- Advocating for and on behalf of older people on issues which matter to them as individuals and as communities, consistently and constantly to ensure we fully understand their needs.

about us

17 Finkle Street
Kendal
Cumbria
LA9 4AB

01539 728118

admin@ageuksouthcumbria.org.uk
www.ageuk.org.uk/southcumbria

Charity number: 1141415

Foreword

In April last year we united with Age UK Barrow & District to form the present charity covering the whole of South Cumbria and targeted at serving the needs of the over 50's. At the time it looked as if all complications, costs and benefits had been addressed and we were ready to move forward with a robust united front. This proved to be the case. Two Barrow & District trustees joined the existing Board; their knowledge of their area greatly aided our plans moving forward. Of course, there were some hiccups, but none that we hadn't anticipated and planned for. The senior management team continued to act with energy and enthusiasm which, backed by their extensive knowledge, makes them an awesome force. We recognise that their leadership has much to do with the success of the whole team, who also rise to all challenges with positivity and energy which is shown in the success of both our retail and service arms.

These changes coincided with new interest from government in the Barrow area, making unexpected but welcome funding available. It was unfortunate that building planning slowed the progress of the move to and opening of the new combined office and retail site on Roose Road, Barrow. We were fortunate to secure the services of builders Graham S Wilson Ltd, to achieve completion of the conversion once all the building regulations had been satisfied.

The ever-present pressures of rising costs and the difficulty achieving grant funding continues and makes our shops and online trading contribution the key to our future. The drive to increase government funded Gift Aid continues, so if you donate then please sign up for this as it gives such a boost to what you already contribute.

The Information & Advice team, alongside our social engagement officers, reaches so many people who come to us, whatever their reason. We are proud of the professional approach and respect shown to all who do. As the number of volunteers increases, we can offer many more social activities to bring all of you together with the aim of improving your quality of life. We hope that you are able to take advantage of some of them and feel the benefit on both your mental and physical health.

Our vision for the future is to build on this strong foundation continuing to put the over 50's of South Cumbria front and centre of all that we do. If you are a part of that by donating, purchasing, volunteering, or as a member of staff you will help us to achieve that ever-challenging goal. If you haven't already joined us but align with that clear vision, then please do. We are sure that you will benefit in so many ways.



Charis M Twist
Chair of Trustees
Age UK South Cumbria

Message from our CEO

This reporting year is the first full year following our merger with Age UK Barrow and District. Following all of the work that was reported on in our last Annual Report, Age UK South Cumbria became a single organisation across South Lakeland and Barrow on 1st April 2025.

Whilst this saw the end of the formal merger process, it was not the end of our work to establish our new footprint and I want to start this update with a huge thank you to all of our staff and volunteers who have worked so positively over this last year to ensure that our new structure addresses the needs of older people across the whole of South Cumbria. I also want to take this opportunity to thank the Senior Management Team, who have also worked hard to make sure that our teams in Kendal and Barrow have been able to come together as one team, whilst also recognising the need to tailor our support to meet the requirements of our different communities.

As you can imagine it has been a very busy year. We have continued to work hard to maintain and enhance the support and service that we give to the older people of South Cumbria, whilst also providing reassurance, particularly to residents in Barrow, that whilst there have been some changes, Age UK South Cumbria is committed to continually developing the services and support we are able to offer.

With this in mind, a lot of the work going on in the background has involved preparations made to move our office location in Barrow from College House to new premises on Roose Road. The intention is to create a more resident-friendly Information and Advice Centre that is more accessible than College House, whilst also developing a new charity store to compliment the store we already have in Wilkie Road. It is hoped that these premises will be finished and our move will be completed in the early part of 2026-27.



Message from our CEO

The development of services and support across the much bigger South Cumbria footprint has not been without its challenges. Opportunities for external funding continue to be difficult and we work tirelessly to identify funding in order to deliver the support and advice that older people across the area need. Our network of Charity stores across South Cumbria continues to generate significant funding that also allows us to run our Client Services activities, whether this is through our information and advice support or through our social engagement activity.

We are also seeing a constant increase in the demand for our services from people aged 50+. However, despite this uncertain landscape, we have continued to be successful in obtaining a number of grants this year which will contribute to our ability to continue offering the highest quality of support to those that need it.

I also need to acknowledge the support that our Board of Trustees has given me and the Senior Management Team over the last year. They were instrumental in making the merger and the year 2025-26 a success and continue to support what we are trying to achieve whilst also providing positive, robust challenge when necessary.

My final thanks goes to the community of South Cumbria without whom we could not achieve what we do. Whether this is through the donations given, the items they purchase or through the many hours of volunteering given to support the Charity.

This annual report provides more detail of the work that we have done over the last twelve months, and I hope you find it interesting. Should you wish to discuss any element of the Charity, or have any other questions, please do not hesitate to ask.



Phil Whiteley
Chief Executive Officer
Age UK South Cumbria

Our Organisation

Board of Trustess

Amy Pearman **Board Member**
Patricia Leahy **Board Member**
Charis Twist **Chair of Trustees**
Brian McCann **Board Member**
James Airey **Board Member**
Lesley Millachip **Board Member**
Oliver Pearson **Board Member**

Senior Management Team

Marianne Kitchen **Finance Manager**
Phil Whiteley **Chief Executive Officer**
Hannah Kitching **Deputy Chief Executive Officer**
Garrie Hartley **Head of Retail**

Junior Management Team

Liz Dawes **Administration Supervisor**
Tracy McConnachie **Client Services Supervisor Kendal**
Samantha Davidson **Client Services Supervisor Barrow**
Chris Roberts **Deputy Head of Retail**
Jude Newsham **Kendal Superstore Manager**
Helen Knowles **E-Trading Manager**
Jane O'Mara **Distribution Warehouse Manager**
John Austin **Ulverston Superstore Manager**
Kirsty Lydon **Grange Superstore Manager**
Alicia Auwkit **Shop Manager Windermere**
Pauline Gill **Shop Manager Bowness**
Tony Clare **Retail Support Associate**
Joanne Mackintosh **Retail Support Associate**
Catherine Sykes **Retail Support Associate**
Sue Gibbons **Shop Manager Barrow-Wilkie Road**
Chloe Hindmarsh **Shop Manager Barrow-Roose Road**
Peyton Rusch **Shop Manager Finkle Street**

Organisational Departments

Client Services

The Client and Social Engagement department provides holistic, confidential, independent advice and support via Compass methodology. The department also provides a wide range of Social Engagement opportunities.

Client Services is made up of:

- 2 x Client Services Supervisor
- 3 x Full-time Case Officers
- 3 x Part-Time Case Officers
- 1 x Full-Time Social Engagement Officer
- 2 x Full-time Helpline Officer
- 1 x Admin and Social Engagement Officer
- 1 x Part-time Social Engagement Officer

Support Services

Support Services provides the organisation with the key operational services we require to ensure that the charity runs as efficiently and cost-effectively as possible. It is also responsible for marketing and communications.

Support Services is made up of:

- 1 x Part-time Finance Manager
- 1 x Part-time Finance Administrator
- 1 x Full-time Administration Supervisor
- 1 x Part-time Admin & Volunteer Support Officer
- 1 x Full-time Receptionist
- 1 x Part-time Handy-person/ Cleaner
- 1 x Part-time Network Development Officer
- 1 x Part-time Senior Admin and Finance Officer

Retail

The Retail department generates unrestricted income for the charity by operating traditional high street shops, superstores, a warehouse, and through online sales. All outlets sell new and donated goods, and we maximise our Gift Aid contributions.

As well as the Deputy Head of Retail there are:

- 7 x Full-time Retail Managers
- 3 x Part-time Retail Managers
- 1 x Full-time Assistant Manager
- 3 x Full-time Retail Support Associates
- 3 x Full-time Store Associates
- 14 x Part-time Store Associates

Client Services Staffing

Total Paid Hours:	21,476
No. of Volunteers:	88
Total Volunteers Hours:	12,064

Support Services Staffing

Total Paid Hours:	12,376
No. of Volunteers:	0
Total Volunteers Hours:	0

Retail Staffing

Total Paid Hours:	46,592
No. of Volunteers:	85
Total Volunteers Hours:	17,240

Social Engagement



Our Walking Cricket group in a friendly match with a Whitehaven group

We continue to be incredibly proud of the social engagement programme we have built, and more so of the fact that we continuously strive to improve and increase this offering with the view to meeting the changing needs of older people locally.

With the Barrow-in-Furness footprint now within our gift, and the inclusion of a Barrow Social Engagement Officer joining the team with an existing schedule of successful activities, the year 2025-26 has been extremely positive for social engagement.

Our two Social Engagement Officers are established, approachable representatives of the organisation operating within our local communities where our activities are based, seeking to act as advocates for the social needs of older people locally. Raising awareness of Age UK South Cumbria social engagement delivery is a vital component of the role. Our Social Engagement Officers have attended in the region of 30 external community events and hubs, working towards our aim of reaching as many people as possible who have yet to access our services and activities.



Last year saw us deliver 61 different groups on a regular basis across South Cumbria communities, which met 2,116 times throughout the year and reached over 33,850 attendances. What a fantastic achievement, and a reflection

of the dedication and passion of our Social Engagement Officers and the wider teams within our organisation who all work tirelessly to support this offering.

In addition to our regular groups, we have also held some very successful events including a series of 'Grand Days Out' in partnership with Stagecoach, providing a free day of activity at various local attractions. A series of accessible outdoor experiences at the Kepplewray Centre were also held last year, ensuring older people can access new experiences regardless of their age and barriers.

Our commitment to diversifying our programme is reflected in the new groups set up over the past year to offer new opportunities for older people, including a new walking cricket group, accessible yoga groups and reminiscence discos!

The extent of our social engagement activity would not be possible without the support and commitment of our valuable volunteers. In view of our growing portfolio of activity, our Social Engagement Officers successfully recruited 27 new volunteers last year, joining our existing 125 volunteers specifically supporting our groups and activities.

With many of our groups at capacity, it is clear our activities are well received, but this also reflects an increasing need locally for accessible social opportunities. As such, moving forward we aim to continue increasing and diversifying our offering, including the impending re-introduction of our Digital Support activity and the development of a befriending service in Barrow.



Client Services

6000
The number of local older people we have supported this year

3500
Older people requiring significant advice and support

51,000
Individual contacts with older people in 2025-2026

Last year was a mammoth year for Client Services. The merger presented a fantastic opportunity to develop bolstered and streamlined services across the whole of South Cumbria, and it is fair to say that our team rose to the occasion with great success, thanks to their hard work, dedication to the cause, and belief in why we do what we do!

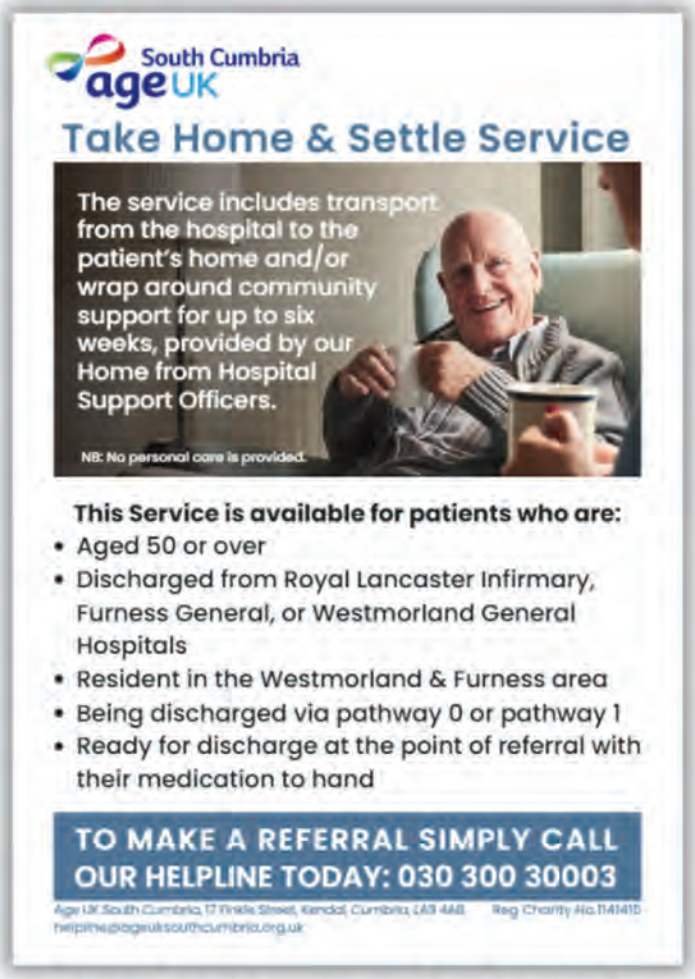
The team grew overnight on 31st March 2025 – with two additional Case Officers, a Receptionist, Social Engagement Officer and Supervisor joining the existing team. With them, they brought a wealth of local knowledge and experience and were a great addition to an already fantastic team.

In order to offer a consistent service offering across the whole geographical patch, the age range for services was lowered to 50 years of age for the Barrow area; a positive change for the older people of Barrow, increasing accessibility of services . Consequently, Barrow staff undertook an array of training to facilitate the new working-age benefits offering, in addition to learning the Compass assessment processes, associated methodology, and case recording systems. The team was supported excellently by the existing Case Officers and Kendal Clients Services Supervisor, before a new Barrow Client Services Supervisor was welcomed into post in January 2026 to continue developing this great work to offer bolstered services across Barrow.



The Client Services team welcomed further new staff members to re-introduce a vital Take Home and Settle service across South Cumbria; another fantastic extension to our array of services this year, designed to increase health and wellbeing outcomes for older people.

In addition to and facilitated by all of this work going on behind the scenes throughout the year, most crucially, the team have supported nearly 6000 older people this year, with over 3500 older people requiring significant advice and support through full assessments, home visits and follow-up support, amounting to over 51,000 contacts with older people in 2025-2026. This is a staggering achievement, and we continue to be proud not only of the number of older people we successfully reach, but also the quality of support which is provided with care, thought and meticulous attention to detail.



Not being an organisation, or team, to sit on our laurels, we look forward to continuing to make exciting developments to our services next year.

We are excited to open our new Information and Advice centre and office in Barrow in April 2026, bringing a lot of hard work, in terms of the building renovations, to a close and marking the start of a new era for our staff, organisation and older people!

Retail

Highlights of the year

This has been an exciting year for our retail arm as we closed out the financial year with the opening of our brand-new shop on Roose Road in Barrow, located right beside our Barrow client and services office. We now have two shops in Barrow, with the existing shop on Wilkie Road continuing to thrive and play a valuable role in that community. The Age UK South Cumbria retail network now consists of 9 retail shops, plus our E-Trading department, which operates behind the scenes to generate additional income through higher value items.



338263

Number of items through the tills

Why we do what we do

Every penny of the funds raised through our shops from generous donations goes directly towards helping vulnerable older people in our area. This local concept sets us apart from many other charity stores on the high street. Funds raised by Age UK South Cumbria retail are currently contributing a large proportion of the total income needed to operate the charity. Running a thriving and sustainable retail operation will enable us to continue offering the essential services we provide to older local people of South Cumbria. When our retail arm thrives, there is a ripple effect across the entire organisation, enabling us to help even more people.

There are other positive impacts from our retail operations, notably the environmental impacts that are an organic by-product of our shops. When people choose to donate to us, they help us divert useable items away from the local landfill. Additionally, when choosing to shop with us rather than purchasing new, the environmental impacts reach even further in reducing the demand for new product manufacturing and distribution, and the massive environmental impacts associated with that.

How we do what we do

Our achievements would not be possible without the continual hard work and commitment from our dedicated shop volunteers and retail staff. Our wonderful volunteers contribute in many ways, including serving customers, sorting and pricing donations, creating attractive displays, processing Gift Aid donations and maintaining the shop floor to ensure our shops look stunning and well stocked.

Our shops are community hubs that provide a place for people to come together, to volunteer and be part of a team contributing to meaningful work, and to shop in a place that feels friendly, familiar and affordable. We are fortunate to have strong communities in which our customers and donors continue to loyally support us. The shops provide more than simply a retail service. They are also an important point of contact within the community and help raise awareness of the work carried out by Age UK South Cumbria, and we are proud to have all our South Lakeland shops recognised as age-friendly retailers.



Positive impacts of our retail operations

Charity retail is very different and more complex than in for-profit retail establishments. Every item that comes through our doors is assessed for saleability, priced individually, and carefully displayed appropriately. In everyday for-profit retail enterprises, the product arrives priced, hung and ready for the floor, merchandising guides provide the shop merchandising layout, and every part of the operation comes with an instruction manual. In Charity, our shops are unique ecosystems where we must work diligently as a team to process unpredictable donation volumes into retail-ready items and maintain a well merchandised shop floor and high levels of customer service.

This work is challenging, complex, but ultimately very rewarding. With the cost-of-living crisis continuing and everything becoming a lot more expensive, we see more people coming into our shops in search of affordable items. In addition to this, there is a growing consumer trend towards environmentally friendly and values-aligned spending. We are now seeing a new type of customer entering our doors, a customer that chooses to shop pre-loved rather than contributing to the environmental impacts of excessive manufacturing and over consumption of new products.

Over the past year we sold a total of 342,185 items, resulting in a revenue of £1,584,800.19 for Age UK South Cumbria operations.

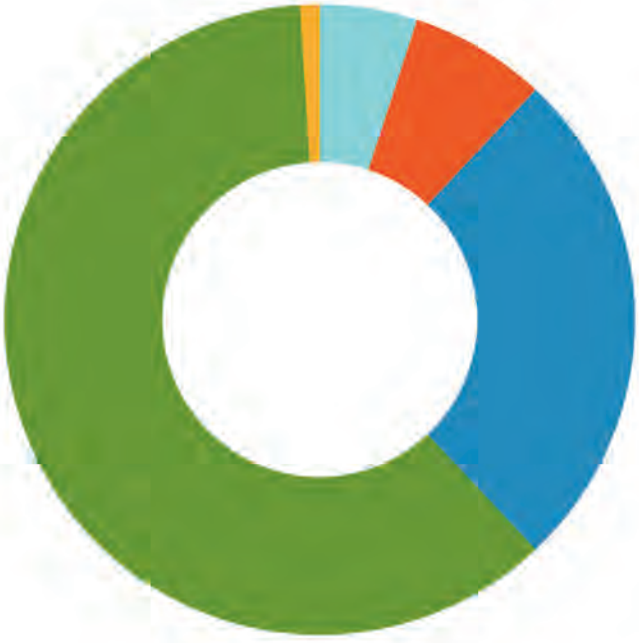
Financial Summary

The charity has remained financially stable for the financial year from April 2025 to March 2026. Our budget for the year forecast a deficit of £104,179, however with the efforts of the team we ended the year with a surplus of £256,553. We have achieved this in part by working to keep our overheads as low as possible despite rising prices, plus securing additional grant funding. Our hard-working retail team has also contributed 61% of our annual income. In line with the national trend, the year proved very challenging for our Charity stores, but they continue to perform strongly.

All of this activity resulted in free reserves totalling £182,089. There was growth on our investments of £16,639, plus we have earned interest on short term deposits of £9,694. Owing to our strong financial performance and planning, we were in a position to draw down from our investments and invest £150,000 into our Roose Road location. The remainder of our reserves continue to ensure the ongoing sustainability of the Charity.

Total Income for 2025-26

£2,720,284



- 7% Investment Income
- 26% Charitable Activities
- 61% Activities for Generating income
- 1% Donations & Legacies
- 5% Other Income

Looking towards 2026-27 our budget is forecasting a deficit of £115,407. However, we are confident that we will be able to secure appropriate grants to fund the forecast deficit. Our strong financial position means that we will be able to manage any deficit if required.

Following the completed merger with Age UK Barrow and District we continue to develop the new structure, and we are looking forward to moving into our new premises when they are completed. We are working together as a larger team and monitoring the finances closely to ensure our continuing success as we grow and embed our new financial processes.

Some of the challenges we faced this year include an increase in the National Minimum Wage which had a knock-on effect across all pay grades. Rising energy bills continue to be a challenge. The Trustees and Senior Management Team will continue to put robust plans in place to ensure the security of our team and all our clients who benefit from our services.

The financial statements for the year to 31st March 2026 were approved by the Board on 2nd September 2026. The financial results we have seen this year are not typical of many charities who are facing challenges such as staff reductions and store closures. Our strong position is testament to the collective efforts of all our staff, volunteers, clients, donors and customers. The Senior Management Team would like to extend many thanks to everyone supporting our ongoing success.

Total Expenditure for 2025-26

£2,509,832



46% Charitable Activities

54% Activities for Generating Funds