



2024 annual REPORT

Charity Member Update



About Us

Age UK South Lakeland 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 Lakeland, and our impact locally is driven by the passion and dedication of our team of 51 staff and 177 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.

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about US

Charity number: 1141415

The last year saw many challenges and changes, not only here at AGE UK South Lakeland. World events continued to affect our funding with opportunities becoming even more scarce and the higher cost of living increasingly impacting our clients, staff and volunteers as well as our operational running costs as a Charity. The invaluable contribution from our retail estate replaced most of the nearly non-existent external funding and continues to increase year-on-year, contributing 75% to our work this year. We would be severely restricted in what we do without it and to those of you who contribute by donating or buying from us, a huge thank you.

Although Age UK South Lakeland is a totally independent charity who stand or fall by our own efforts, we are one of approx. 128 charities who partner with Age UK, the national organisation. Many of the partners are facing great hardship but the security we have in our reserves, donations and legacies plus the substantial retail contribution enables us to carry out the work we see as being so crucial to the over 50's of South Lakeland. We so need the income from all these sources to continue to make a difference. We are limited only by the funds that we have at our disposal. There is always more that we would do if we could.

The then CEO Hugh and DCEO Pam both retired in December 2023 after many years of dedicated service and achievement. This planned departure enabled them to identify and prepare those who turned out to be their successors and we were indeed fortunate to be able to recruit from within. Phil Whiteley, then Partnerships Development Manager and Hannah Kitching, then Client Services Manager, moved up to take their places as CEO and DCEO respectively in an almost seamless changeover. Their knowledge, experience and enthusiasm will help to carry the Charity forward in becoming even more robust and prepared for whatever challenges we face in the future.

The increasingly scarce but invaluable volunteers are beginning to emerge once again, and we have been able to restart a significant number of activities in the community. I'm sure that both volunteers and clients benefit from being out and about again. We still need many more volunteers for many different roles including that of trustee, so if this is you, please do not hesitate to step forward. You will be made very welcome. Do not underestimate the difference a few hours per week can make when we all pull together.

It is down to the exceptionally high standards, dedication, energy, reliability and welcoming friendliness of our staff and volunteers that we hold such a high reputation within South Lakeland and beyond. They are all just amazing and I am truly proud to chair this remarkable organization. On behalf of all the trustees, I salute you.



Charis M Twist
Chair of Trustees,
Age UK South Lakeland.

Message from our CEO

In January 2024, I was privileged to take up the role of Chief Executive Officer here at Age UK South Lakeland. Having worked with the charity for the previous 7 years I had a good understanding of the tremendous work that all of our teams do to support the older people of South Lakeland.

I should like to take this opportunity to thank the Board of Trustees for having the confidence to appoint me as the new CEO following the retirement of the previous postholder, Hugh Tomlinson. Hugh had led the organisation for a number of years and left the charity in a really good place along with the support of all of our Trustees, part way through this reporting year.

As well as the retirement of the previous CEO, 2023/24 also saw the retirement of our Deputy CEO, Pam Lewis at the same time. I was in the fortunate position of being able to appoint an extremely competent and capable Deputy in Hannah Kitching. Hannah has also worked with the charity for a number of years and has brought a wealth of experience with her into this new role, having a background in social work and spearheading our Information and Advice services for a number of years.

I would also like to echo the comments of our Chair in her foreword with regard to the high standards of service that our dedicated staff and volunteers give to those older people that need our support. Their efforts and pursuance of excellence in all aspects of the charity mean that we can be proud of everything that we have achieved during 2023/24.

The challenge now is to build on this success as we move forward into the next chapter of the charity. The same challenges of funding, staff retention and recruitment and an ever-increasing demand for our services continue, but I am confident that with the team we have, we will meet these challenges head on and be successful.

My final thanks go to the community of South Lakeland who continue to support us with their generosity either through the donations they give, the support of our shops or the time they give through volunteering.

I hope that you find the information included in this annual report interesting, but should you wish to discuss any element of the charity or have any questions, please don't hesitate to ask.

Phil Whiteley

**Chief Executive Officer
Age UK South Lakeland.**



Our Organisation



Board of Trustees

Charis Twist
Chair of Trustees

Sue Newell
Board Member

Charlotte Lewis
Board Member

Brian McCann
Board Member

James Airey
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

Chris Roberts
Deputy Head of Retail

Jude Newsham
Kendal Superstore Manager

Helen Knowles
E-Trading Manager

Jane O'Mara
Shop Manager Kendal

John Austin
Ulverston Superstore Manager

Kirsty Lydon
Grange Superstore Manager

Paul Hodskinson
Shop Manager Windermere

Mary-Alice Hoggarth
Retail Relief

Tony Clare
Retail Relief

Joanne Mackintosh
Retail Relief

Alicia Auwkit
Shop Manager Bowness

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:

- 1 x Client Services Supervisor
- 2 x Full-time Case Officers
- 2 x Part-Time Case Officers
- 1 x Full-Time Social Engagement Officer
- 1x Full-time Helpline Officer
- 1 x Part-time Helpline Officer
- 2 x Vacant Case Officer posts
- 1 x Vacant Helpline Officer post

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 Part-time Compliance Officer
- 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

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:

- 5 x Full-time Retail Managers
- 2 x Part-time Retail Managers
- 1 x Full-time Assistant Manager
- 3 x Full-time Retail Support Associates
- 3 x Full-time Store Associates
- 17 x Part-time Store Associates

Client Services Staffing

Total Paid Hours:	18,564
No. of Volunteers:	88
Total Volunteers Hours:	9,152

Support Services Staffing

Total Paid Hours:	12,388
No. of Volunteers:	4
Total Volunteers Hours:	1,041

Retail Staffing

Total Paid Hours:	57,512
No. of Volunteers:	85
Total Volunteers Hours:	8,840

Social Engagement



WE REACHED OVER 24,743 ATTENDEES IN TOTAL OVER THE YEAR

Throughout the last year Age UK South Lakeland has continued to strive to provide a fully accessible and wide range of social opportunities to suit all ages, interests and needs, acutely aware of the importance of social engagement in later life, and equally as aware of the difficulties older people face in being able to access these opportunities.

We are the biggest provider of social engagement locally, and our offering continues to increase whilst overcoming numerous different challenges each year.

During this year, our Social Engagement Officer was faced with a decreasing volunteer cohort and increasing demand for our events and activities. Lunch club venues were affected by the Cost-of-Living crisis, leading to many establishments sadly closing their doors and groups left at risk of being disbanded.

Local community halls were left with no choice but to increase their hire costs, which led to an increase in our expenditure for providing these activities, whilst maintaining that we were not going to pass this increase in costs on to the older people that the events seek to serve, consequently widening the gap between our income and expenditure for social engagement.

Our Befriending service, one of the very few available in South Lakeland, continues to provide a vital source of social interaction to those unable to attend remote groups and events, many of whom often don't see another person for weeks on end. Facing some upsetting and challenging situations, our volunteer Befrienders ensure we can continue overcoming the barriers to social engagement for our most vulnerable members of the community.



**GROUPS RUNNING
ACROSS
SOUTH LAKELAND**

Our Social Engagement Officer, supported by the Client Services Team and Administration Team, made great strides in supporting our fantastic volunteer group leaders and coordinators to ensure that all groups continue to run regularly and consistently, whilst also successfully embarking on a volunteer recruitment drive to support the growth and development of our social engagement portfolio – with 82 volunteers supporting social engagement activity throughout the year. It is safe to say that we could not sustain this offering without the consistent hard work and dedication of this team of volunteers.

The National Lottery funded project, Re-connecting Cumbria, proved extremely successful and exceeded all funder expectations in developing and increasing social opportunities for older people across Cumbria post-Covid, maintaining our reputation locally and with national funders for the delivery of accessible and high-quality opportunities for older people.

During the last year, we offered **42 different groups** across South Lakeland which met **1,508 times throughout the year**, and hosted various other events in addition, including a King's Coronation celebration, and Entertainment afternoons. **We reached over 24,743 attendees in total over the year.** A huge achievement!

We also continue to support many local community groups and initiatives in attending community events, drop-ins and engagement days, providing information stands, delivering awareness raising talks and ensuring our presence is visible in all local communities.

Looking forward to next year, our Social Engagement Officer is already working on lots of exciting plans for new groups and events, and we anticipate welcoming many more older people through our doors to provide them with the social interaction that we all need for a happy and healthy later life.



Client Services

The Client Services team entered the year continuing to support older people to re-engage with vital services post-Covid, with many having lost confidence or ability to do so independently.

But this mammoth task was hindered somewhat by the changing landscape of this service delivery locally, with many services having ceased, and remaining services now proving inaccessible for older people – often now being provided remotely or digitally to sadly replace face-to-face delivery in many circumstances, with long wait times for both statutory and community services also compounding the issue.

As passionate advocates for the clients that they serve, our Client Services Team have worked tirelessly to navigate through the fog of this changing health, social and community care landscape on behalf of older people to ensure that, despite the many additional barriers older people are now facing, they are not left without the support they so desperately need. They stood proud in maintaining their vital and truly holistic service delivery taking place within the comfort of the older person's home environment, which is now a very unique offering locally.

The Cost-of-Living crisis struck in the midst of these challenges and wiped many older people off their feet. For the older people that we serve, the eye watering increase in their expenditure, which for many was already as reduced as it could possibly be, coupled with their limited fixed incomes, meant that they were finding themselves taking drastic action, heartbreakingly choosing between heating or eating in many situations.



Understandably this crisis led to an inevitable increase in demand for our vital support services, with older people desperate to find a way to weather this further storm. 5,824 older people reached out to our Client Services Team over this year, being supported through 19,991 touch points from our Client Services Team, showing an incredible need for our services, only being achieved through hard work and dedication of our whole Client Services Team.

With no sign of any statutory funding to maintain our increased level of activity and support for older people during these unprecedented times, and the Client Services Team already working tirelessly to bridge the gap in service provision locally, once again the Client Services Team found themselves in the frustrating position of being unable to meet the demand for our vital services.

In never being an organisation to sit on our hands, the decision was made to respond to this independently, increasing our resource for the Client Services Team in order to meet this rising demand for service provision.

Whilst this had a significant effect on our budget not only for this year but for the years ahead, this meant that, importantly, as an organisation, we were able to remain agile and responsive to the unfolding events nationally and locally, always with the aim of being able to identify and respond to the needs of older people in our local communities.

The increase in resource for the Client Services Team meant that the work of our vital Helpline function could be developed, and our Case Officer team expanded in order to provide a more comprehensive and timely response for older people, often in a state of crisis, to speed up their access to the information and advice they so desperately need.

In being one of the only holistic Information and Advice services locally, providing one-to-one support truly accessible through invaluable home visits, we continue to stand tall above the rest, proud of our achievements over the year and determined to build upon this in the year ahead, for the sake of our local older people who rely on us in so many ways.



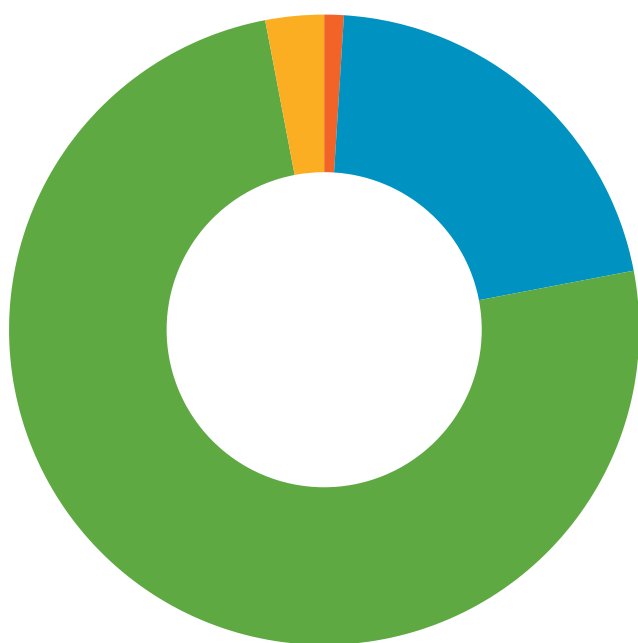
Financial Summary

Financially, the Charity had a good year during the period April 2023 to March 2024. Going into the year, our budget forecast a deficit of £49,906, however we ended the year with our final accounts showing a surplus of £110,486, due in part to securing additional grant funding and our retail team securing a higher than forecast contribution to our annual income. A remarkable turnaround led by our Board of Trustees and Senior Management Team and facilitated by every staff member and volunteer.

In line with our accounting policies, this surplus now forms part of our free reserves which have risen to £371,607. There was growth on our investments of £37,965, although it is worth mentioning this reverses the previous year's loss of £34,342. We are fortunate that through our work and planning we have not needed to draw down from our investments and they remain part of our reserves to ensure the ongoing sustainability of the Charity. We continue to monitor and analyse our investment opportunities to ensure we are maximising every opportunity to provide more income for the Charity.

Total Income for 2023-24

£2,025,450



- 1% Investment Income
- 21% Charitable Activities
- 75% Activities for Generating Funds
- 3% Donations & Legacies

During the year we fully repaid our Barclays Coronavirus Interruption Loan. This was initially due to be fully repaid in the 2026-27 financial year, however given the healthy position of the Charity, the decision was taken to repay this early saving us several thousand pounds in interest repayments.

Looking towards 2024-25 our budget is forecasting a deficit of £100,451, due to increased expenditure and potential lack of grant funding opportunities available to us. As such we may need to use reserves to support the ongoing and necessary costs of our work supporting the older people of South Lakeland. We will continue to work hard to secure appropriate grants and funding opportunities to offset the forecast deficit, however we are in a strong position if none become available. We also aim to work on increasing our Gift Aid contribution, as this presents an excellent opportunity to increase our income.

Whilst we face several ongoing challenges maintaining our retail charity shops, securing grant funding and balancing a myriad of rising costs, the Charity 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 31 March 2024 were approved by the Board on the 31st of July 2024. This successful year is possible only due to the collective efforts of all our staff, volunteers, clients, donors and customers. From a penny in a collection box through to hundreds of hours from volunteers supporting our shops and activities and everything in between, we are a great Charity. The Senior Management team would like to extend many thanks to each and every individual involved in our ongoing success, and we look forward to the year ahead.

Total Expenditure for 2023-24

£1,952,929



■ 45% Charitable Activities

■ 55% Activities for Generating Funds

Age UK South Lakeland's successful retail division currently consists of five high street stores, two superstores, a furniture warehouse and an E-trading department, served by 31 members of staff and a mighty army of generous and dedicated volunteers. Every penny of the funds raised from generous donations sold in these stores and online platforms goes straight in to funding the services supporting older people in our area.

Retail performance improved again on last year despite the many challenges faced throughout year, with the retail sector now proving to be a very competitive landscape for recruitment purposes, and the cost-of-living crisis affecting sales trends and consumer priorities.

Our Retail Team raised a huge £1,528,180 this year, and in doing so contributed over 75% to our total income for the year. This fabulous achievement is a testament to the hard work and commitment of every single retail employee and generous volunteers over the year.

Charity retail is very different from other parts of the retail sector due to the very nature of collecting, receiving and selling donations. Our staff and volunteers have to work hard to gather donations, analyse each item to determine the condition, sale value and the best method of sale for the item, before even getting it to the shelf. Stock rotation and distribution forms a significant part of the team's everyday workload – unlike other retail stores, we aren't given shelf and store layouts to follow nor given stock at appropriate intervals and times of the year, we work hard to turn donations in to saleable and desirable items to maintain a well merchandised shop floor.

Our charity stores are more than a retail shop, they are inviting, welcoming and instantly recognizable to a wide range of people as being a good cause to support, a great place to find a bargain and an even better place to meet and converse with people.





Our Retail Team has proven successful in proactively adapting to the changing market and needs of their customers locally and remaining open-minded to new methods with a view to increasing sales. This year, our Retail Team have responded to the rising demand for clothing and bric-a-brac, as people find new ways of making their money go further during the cost-of-living crisis, whilst furniture donations continue to fall as people look to sell these items privately instead of donating them for free.

This year we have reduced the number of new goods being sold in our stores to concentrate efforts on utilizing the space we have for our donated goods, which return 100% profit and support the Charity shop model.

Over the last year we have found that, thankfully, sustainability is much trendier than it once was, consequently increasing footfall in our shops as people aim to re-use and recycle more. Our Retail Team raised £36,783 this year through recycling goods, diverting a significant amount of waste from landfill.

Our Retail Team have shown great forward-thinking and perseverance throughout the year, and we look forward to building on this next year to achieve more record-breaking sales for the Charity – always with the aim of enabling our Charity to continue providing vital support services for older people locally.

Average
transaction value
£9.50



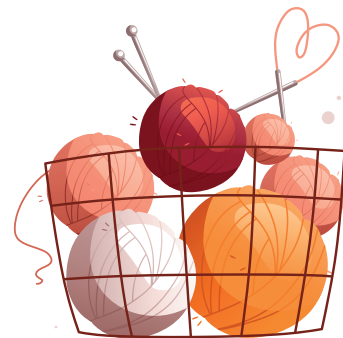
171,188
CUSTOMERS



325,662
items sold,
6805 of
which sold
online by
e-trading



10,957 balls of wool
sold, generating
£19,902 in sales



1148 new Gift Aid donors signed up ✓

