

O C A Y

OLDER CITIZENS
ADVOCACY-YORK

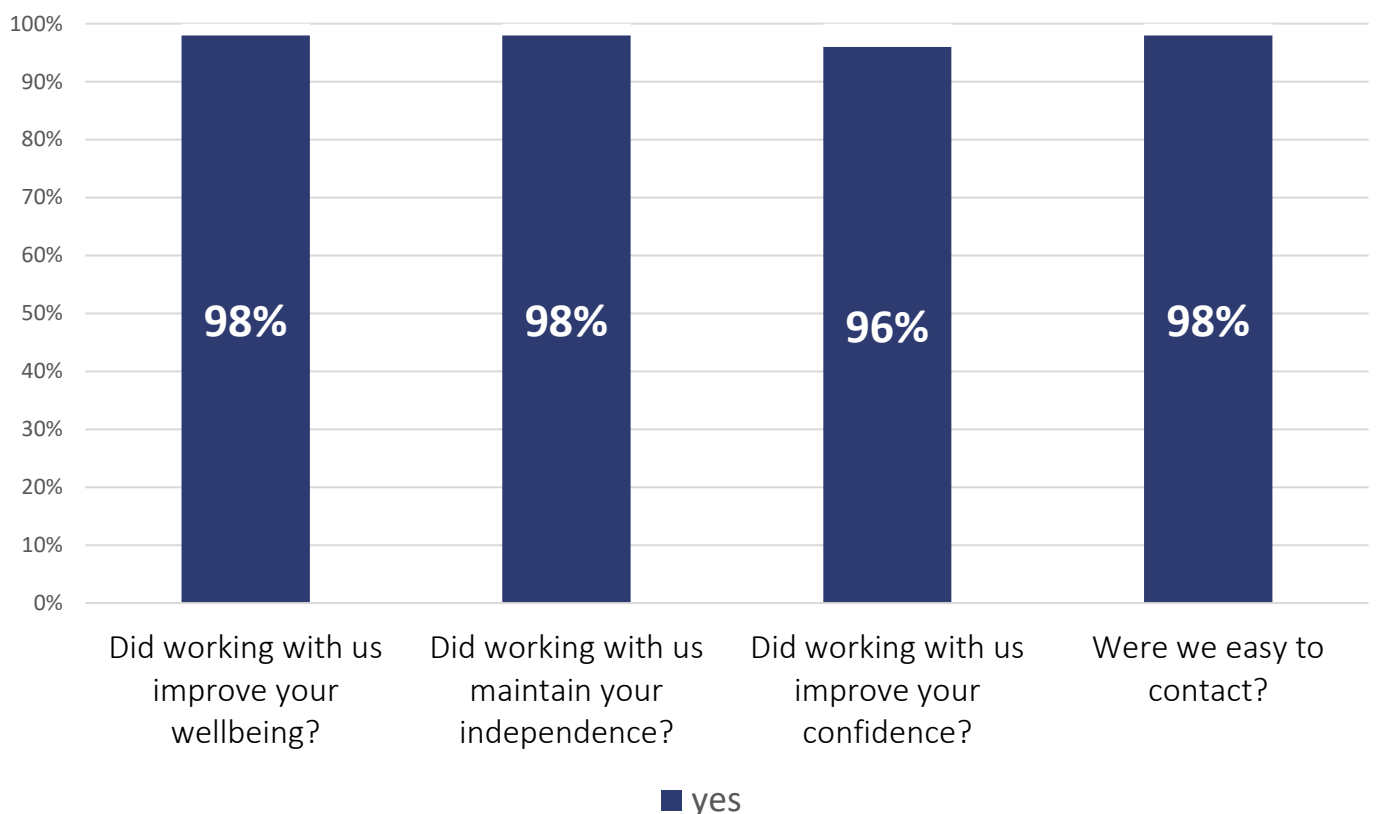
ANNUAL REPORT and ACCOUNTS 2018-19

Registered Charity No. 1173795

O C A Y was founded in 2001 by a group of older people. They became involved in a pilot run by 'Better Government for Older People', intended to orchestrate better services and communities that worked for older people. We emerged to meet these needs, ensure inclusion, and get older people's voices heard. We have continued to evolve over the years, with funding from the National Lottery Community Fund supported by smaller grants from City of York Council wards and grant-making organisations alongside our own fundraising.

We have offered an independent, free and confidential advocacy service to those over the age of fifty in the City of York area for 17 years and continue to successfully advocate for those in need.

FEEDBACK from O C A Y CLIENTS, 2018-19



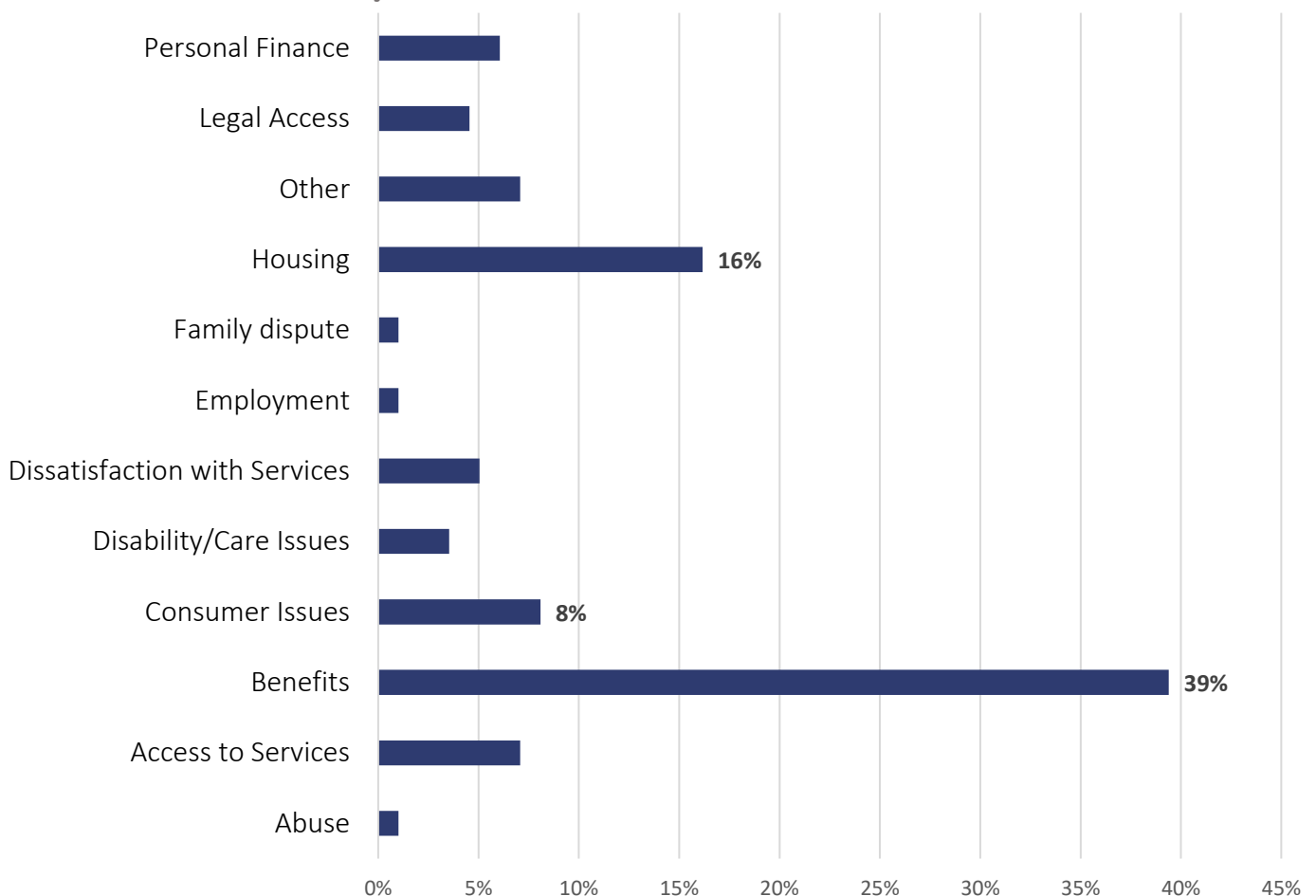
O C A Y supported over 300 older people in York in 2018/19

OCA Y supports clients with a really diverse range of issues. We've helped people with passport applications, airline complaints, filled in power of attorney forms, made advance plans for funerals and helped people find out what's going on in their communities. We've seen a large increase of people looking for support around benefits, from information and form-filling through to attending assessments and tribunals. We've spent 1888 hours directly advocating for clients this past 12 months. That's an average of 6 ½ hours of support for each client!

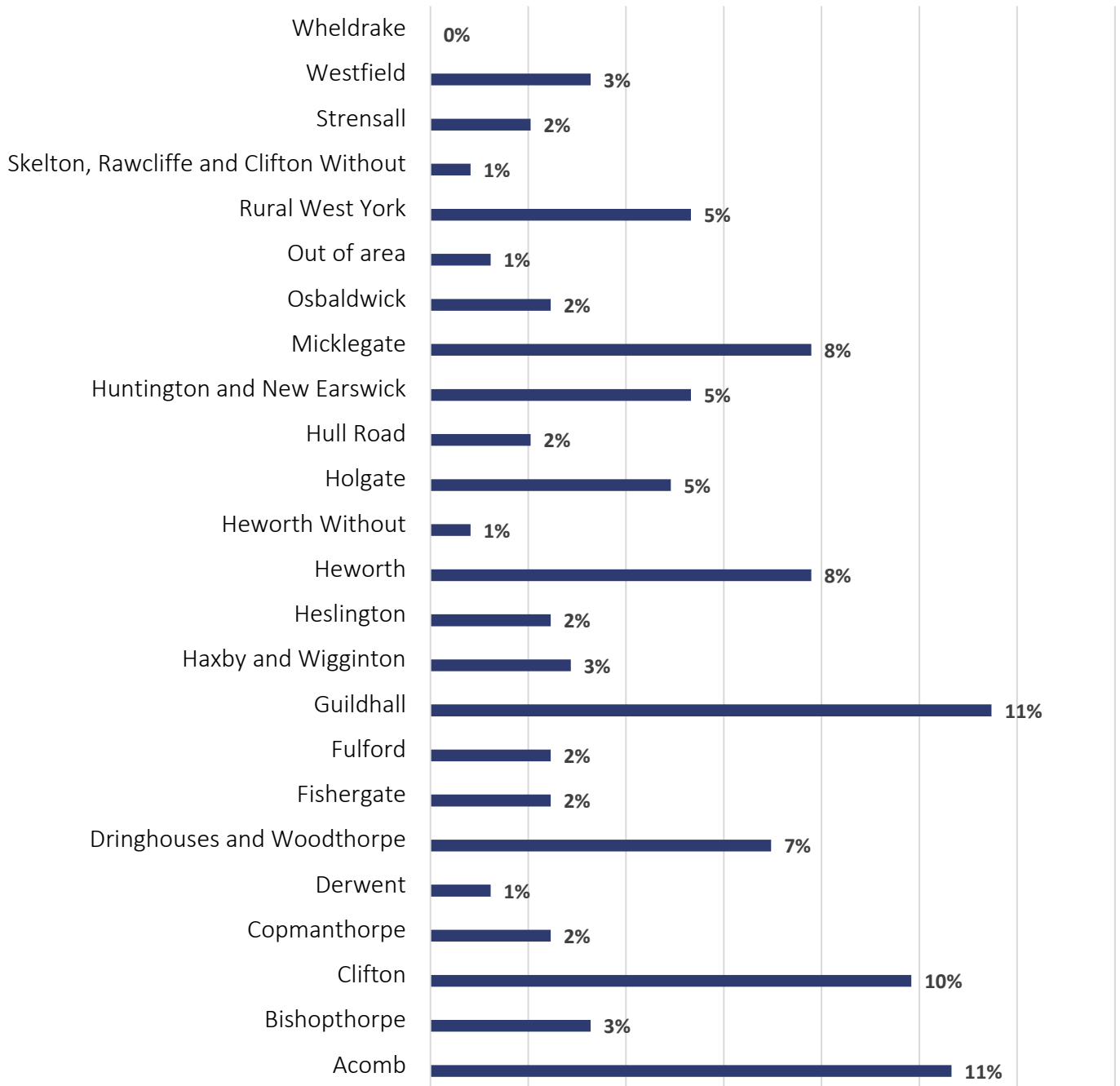
Clients come to OCA Y in a variety of ways - some are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us. We run a door-knocking project to ensure that everybody is aware of our service and know they can contact us, whatever the issue. We currently go to 8 different community groups, libraries and cafes across York where people can stop by to find out what we do, receive information or arrange to meet an advocate.

We mostly see clients at our offices in Priory Street, or if this is difficult then we will see them at their own home. We do everything possible to make sure our service is accessible, and known, by anyone who may need it.

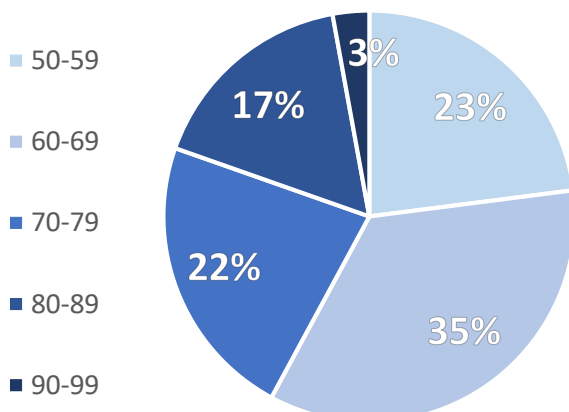
OCA Y CLIENT ISSUES by %



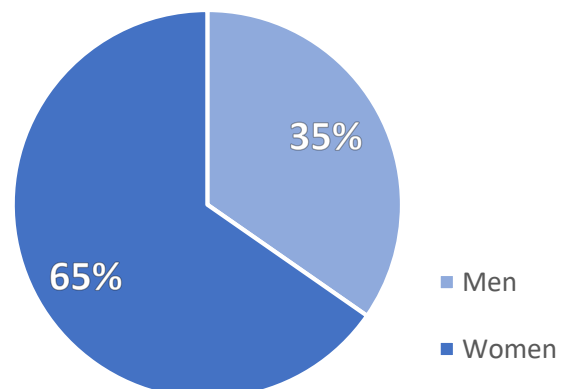
% OF OCAY CLIENTS BY WARD



CLIENT AGE



CLIENT GENDER





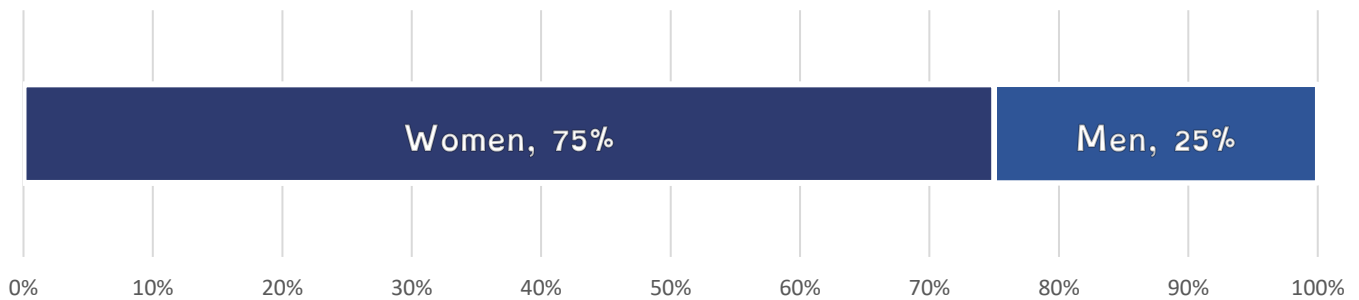
currently has 30 volunteer advocates and 4 community fundraisers...

Our service could not operate without our volunteers. We are very proud of the work that they do. They help a wide range of older people, supporting them with many different issues such as...

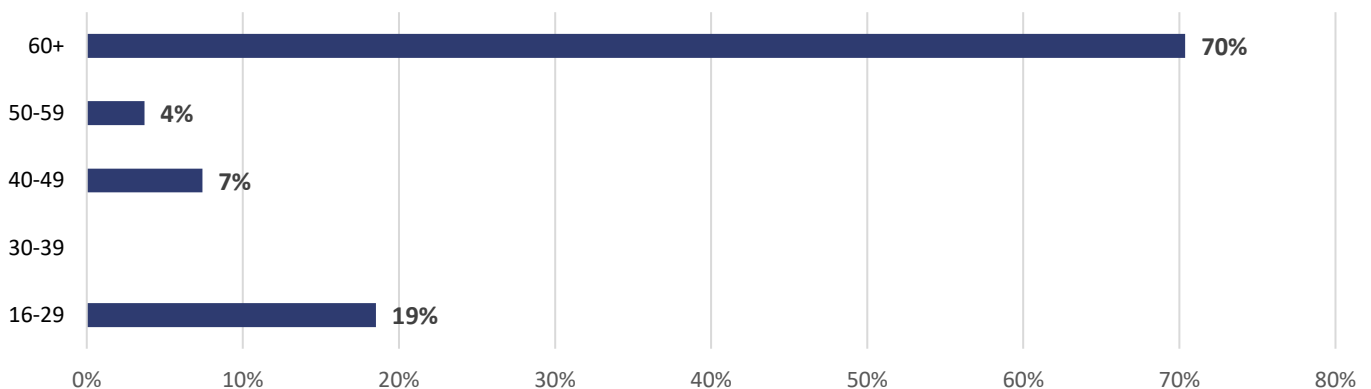
Client with learning difficulty, who was currently in debt, wanted support to backdate their universal credit claim. The advocate met with client on numerous occasions to get to know them and familiarise themselves with their needs. The advocate wrote an appeal, under the client's instruction, asking for the DWP to backdate their claim. The appeal was successful, and the client was awarded back pay which amounted to approximately £900. The client was very grateful for the award as it meant that they were no longer in debt.

Client was appealing against the decision to refuse them a Blue Badge for parking. They had physical health issues and limited mobility. They contacted us and asked for our support. They were invited to an assessment at the council offices and asked us to accompany them. The advocate accompanied them to the assessment and gave moral support and reassurance. A few days later the client found out that they had been successful and had been awarded a Blue Badge. This will greatly improve their mobility around the local area.

GENDER of OCAY VOLUNTEERS



AGE OF OCAY VOLUNTEERS



O C A Y

 currently has three staff members,
and eight trustees

Ruth Potter, Charity Manager: Ruth manages the work of OCA Y overall and monitors and develops the effectiveness of the service on an ongoing basis. She is responsible for applying for grants, fundraising and leading organisational development.

Dan Brittan, Lead Advocate: Dan manages his own caseload and carries out initial meetings with all clients. He also gives support and supervision to volunteer advocates. He uses his advocacy expertise to support development work.

Jonah Hebron, Project Support Officer: Jonah is the first contact for support clients, volunteers, and external organisations. He is responsible for data analysis and monitoring the service. He also undertakes outreach work in the community.

Chair's Report: In recent years failures of governance in national charities have had a high profile in the press and become part of the context in which charity trustees work. This is clearly damaging to the sector, but the best way we can counter it is to place a high priority on continuous improvement in effective and ethical governance. During 2018-19, OCA Y has continued to be blessed with a strong and able team of trustees, enabling us to continue to develop our strategic and accountability role within the charity, with new members joining us and bringing new energy, skills and strengths to the team. We are still seeking up to two new trustees, particularly with skills in marketing and publicity, business development and fundraising. If you are interested, please contact Ruth Potter for more information.

Trustees, April 2018 – March 2019:

Rachel Totton (Chair)

Sylvia Doughty (Vice Chair, Secretary)

James Grainger (Honorary Treasurer - Associate
Trustee)

Sharon Beattie

Alan Filby

Susan Hannon

Chelsea Martin

Vicky Walpole

Bankers: HSBC & CAF

Examiner of Accounts: Steven Walker

Patron: Professor Dianne Willcocks

Honorary Vice President: Douglas M. Craig, OBE

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York, YO1 6ET

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Email: info@ocay.org.uk

www.oldercitizensadvocacyyork.org.uk

What OCA^Y did in 2018–19

Why we did it

Quality Standard

Achieved the 'Investing in Volunteers' Quality Standard

We wanted to ensure that OCA^Y gives its volunteers the support that they deserve, and to review and update our practice against the criteria for best practice in the quality mark. A team of volunteers, trustees and staff worked together to achieve the standard at our first attempt. Giving our volunteers the best possible experience and support helps to ensure that our clients get the best possible service. We have experienced an increase in volunteer recruitment since achieving the standard.

Recruiting and Training Volunteers

Reviewed and updated our volunteer induction training

All new volunteers have access to appropriate training and development, improving their skills and confidence. The most recent induction programme was accessed by 10 new volunteers.

Involving experienced volunteers in the delivery of training

Experienced volunteers can pass on their insights into the role demonstrating a variety of ways that cases can be approached and help to keep OCA^Y sustainable.

Monitoring and evaluation

Updated our database to better provide key insights into our service

To ensure we can meet client needs effectively. We can provide better information to clients and advocates, helping to improve the service. We are also able to use our data more effectively to report to funders, to seek new funding, and to report to our community.

Reviewed and updated our referral process

We wanted to ensure that we were only collecting appropriate data about our clients and that we were meeting GDPR legislation. The new referral pack also contains questions that allow us to measure how the client feels prior to working with OCA^Y. We can then use this information along with post case closure feedback to monitor the impact of our service on the client's well-being.

External evaluation at the mid-point of the National Lottery Community Fund Reaching Communities Funding stream

To give assurance to Trustees and the National Lottery that we were on track to deliver the outcomes set out in the bid. The feedback from clients interviewed and the evaluation findings were very positive.

Outreach

Reviewed and refocused the various ways in which we approach outreach, with an increased emphasis on villages and areas of the city with higher population of older people

Added new venues for drop-ins

To continue to reach new clients, especially those who might otherwise find it hard to access the service; to use limited resources as effectively as possible.

To provide clients with a variety of places where the service can be accessed nearer to where they live. We now provide drop ins at 9 locations across York.

Fundraising

Began work on developing a sustainable fundraising strategy, with a working group of volunteers, trustees and staff. Developed ideas for encouraging donations and legacies and more community fundraising planned

Fundraising remains a constant and increasingly challenging focus for sustainability, with a need for new and imaginative ideas – best achieved through a wide range of inputs to thinking.

Strands for future development identified

Trustees, volunteers and staff worked together to identify the most appropriate activity strands for OCAY to explore and potentially seek to develop for future work:

- Benefits advocacy: *work has commenced*
- Dementia advocacy: *seeking funding*
- Cancer advocacy: *research being undertaken*
- Ex-offender's advocacy: *research being undertaken*
- Ex-service personnel advocacy: *research being undertaken*

Our work with existing clients has shown a range of more specialised needs that OCAY's service could be developed to meet. Developing our understanding of these areas and the depth of need enables us to make a case for funding to help OCAY to remain sustainable in the future. Only advocacy strands consistent with OCAY's core mission - *'The objective of Older Citizens Advocacy York (OCAY) is to provide relief to older people in need in the City of York and its surrounding area by the provision of a general advocacy service'* – are considered.

Leadership and strategy

Supported our Charity Manager to undertake the Strategic Leaders Development Programme Advice and Support, provided by JRF.

Learning from the leadership programme supported a review of our strategic plan and development of our thinking

Continuing to invest in our staff.

Helping OCAY to be sustainable in the future.

Partnerships and networking

Continued to be involved in partnerships and networks:

- Advice York Partnership
- CVS Ageing Well and Volunteer Forums
- Ageing Well Board
- York Older Peoples Assembly

Sharing thinking with partner organisations helps the voluntary sector to be sustainable and gives access to continuing thinking and learning. The range of information gained from working in partnerships and networks also helps us to support our clients effectively.

Older Citizens Advocacy York (OCAY)

**Accounts
for the year ended
31 March 2019**

Registered Charity No. 1173795

Independent Examiner's Report to the Trustees of Older Citizens Advocacy York

I report on the financial statements of the charitable incorporated organisation for the year ended 31 March 2019, which are set out on pages 2 to 5.

Respective responsibilities of trustees and examiner

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

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- examine the financial statements under section 145 of the 2011 Act;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- state whether particular matters have come to my attention.

This report, including my statement, has been prepared for and only for the charity's trustees as a body. My work has been undertaken so that I might state to the charity's trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body for my examination work, for this report, or for the statements I have made.

Basis of independent examiner's report

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

Independent examiner's statement

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

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

- to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities
- have not been met; or

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

Use of this report

This report is made solely to the Charity's Trustees, as a body, in accordance with Section 145 of the Charities Act 2011. My independent examination work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an Independent Examiner's Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body, for my independent examination work, for this report, or for the opinions I have formed.

Steven Walker

Independent Examiner

Summary of Receipts and Payments for the year ended 31 March 2019

	Notes	Unrestricted funds £	Designated funds £	Restricted funds £	2019 Total £	2018 Total £
Receipts						
Grant funding	2	-	-	97,425	97,425	-
Grants repaid to funder		-	-	(473)	(473)	-
Fundraising	3	1,506	-	-	1,506	-
Donations (inc Gift Aid)	4	5,428	-	-	5,428	-
Bank interest		322	-	-	322	-
Gift of assets from charity number 109427	5	24,341	30,988	9,494	64,823	-
Total receipts		31,597	30,988	106,446	169,031	-
Payments						
Staff costs		1,423	-	63,705	65,128	-
Staff training		-	-	102	102	-
Staff recruitment and expenses		16	-	1,023	1,039	-
Volunteer training		33	-	213	246	-
Volunteer expenses		26	-	470	496	-
Fundraising expenses		557	-	38	595	-
Property costs		-	-	8,097	8,097	-
Insurance		-	-	1,072	1,072	-
Telecommunications and IT		-	-	7,704	7,704	-
Asset purchases		-	-	1,238	1,238	-
Office supplies		-	-	586	586	-
General publicity and advertising		118	-	764	882	-
Outreach publicity and events		-	-	2,483	2,483	-
AGM expenses		-	-	301	301	-
Subscriptions		-	-	120	120	-
Bank charges		-	-	60	60	-
Professional fees		-	-	(146)	(146)	-
Development costs		-	-	1,750	1,750	-
Total payments		2,173	-	89,580	91,753	-
Net receipts/(payments) in the year		29,424	30,988	16,866	77,278	-
Cash funds b/fwd at 1 April 2018		-	-	-	-	-
Funds transfer		(354)	-	354	-	-
Cash funds c/fwd at 31 March 2019		29,070	30,988	17,220	77,278	-

Statement of Assets and Liabilities at 31 March 2019

	Notes	Unrestricted funds £	Restricted funds £	Total 2019 £	Total 2018 £
Cash funds					
Deposit accounts		27,823	-	27,823	-
Current account		32,093	17,220	49,313	-
Petty cash		142	-	142	-
Total cash funds at 31 March 2019		60,058	17,220	77,278	-
Represented by funds carried forward					
Big Lottery – Reaching Communities		-	-	-	-
Financial Inclusion – Benefits programme			46	46	
Asset purchase funds		-	713	713	-
Vital York programme		-	4,856	4,856	-
Outreach projects		-	6,605	6,605	-
Allen Lane Foundation		-	5,000	5,000	-
General funds		29,070	-	29,070	-
Designated funds	6	30,988	-	30,988	-
Total funds at 31 March 2019		60,058	17,220	77,278	-

Other Monetary Assets

The Charity does not have any other Monetary Assets.

Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

Assets retained for the Charity's own use

Insured Assets based on the valuation exercise carried out in December 2018 was £17,016 including computer equipment, publicity related assets, office furniture and equipment.

The accounts were approved and authorised for issue by the Trustees on 28.06.2019 and signed on their behalf by:

Rachel Totton
Chair of Trustees

Sylvia Doughty
Trustee & Secretary

NOTES TO THE RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2019

1. These accounts have been prepared under the historical cost convention, on a receipts and payments basis, in accordance with Section 133 of the Charities Act 2011 and following the guidance for accounting for smaller charities issued by the Charity Commissioners.

2. **Grant funding**

	2019	2018
	£	£
Big Lottery – Reaching Communities	71,384	-
Two Ridings Community Foundation – Vital York programme	9,975	-
Outreach projects	7,026	-
Allen Lane Foundation	5,000	-
Financial Inclusion – Benefits programme	2,091	-
Asset purchase grants	1,949	-
	97,425	-

Big Lottery – Reaching Communities

Reaching Communities grant funding covers the general running costs of the charity including the staff costs, property costs and office costs.

Outreach projects

A number of small grants, including Ward Committee funding, have been received to fund Outreach projects in local communities.

Two Ridings Community Foundation – Vital York Step Change programme

This part funds the work of the Lead Advocate and the Manager to support business planning and development work.

Allen Lane Foundation

Funding specifically received to cover the cost of property rental during the 2019/20 financial year.

Asset purchase grants

A number of grants which have been received to cover the cost of the purchase of assets for use by the charity.

3. **Fundraising**

Fundraising Activities yielded £1,506 from a variety of activities and events. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who contributed to the success of these with particular mention of Brenda Gledhill and Sylvia Doughty for their continuing hard work for OCA Y.

4. **Donations**

Donations (including Gift Aid) totalling £5,428 was received during the year. The Trustees, Staff and Volunteer Advocates would like to express their thanks to everyone who donated to the charity.

5. **Gift of assets from charity number 1094279**

Cash assets totalling £64,823 were gifted to this charity from a previously unincorporated charity, also called Older Citizens Advocacy York (charity number 1094279), which has since been removed from the Charity Commission register. In addition, the non-cash assets (including computer equipment, publicity related assets, office furniture and equipment) of the previous charity were also gifted, however no value has been assigned to them within these accounts. Where assets were restricted or designated in the accounts of the previous charity, these have been recognised with the same restrictions in these accounts.

NOTES TO THE RECEIPTS AND PAYMENTS ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2019 (continued)

6. Designated funds

The Trustees have agreed to hold £15,000 in designated funds against contingencies such as staff redundancies, early office lease termination or any other unforeseen emergencies.

A second designated fund of £15,988 is also held following the receipt of donations obtained from the Lord Mayor of York during the 2016/17 financial year by the previously unincorporated charity, Older Citizens Advocacy York - charity number 1094279. The Trustees have decided to designate these funds to be spent on general running costs of the charity in 2019/20, when the grant funding received from the Reaching Communities project will be decreased.