



# Annual Report 2020-2021



*"Over the years of our membership, Open Age has become part of our lives; in fact, it became part of our lives as soon as we joined. Apart from helping us to do what we need to do physically, to become/remain 'the best that we can be', and opening a whole new circle of friends, we were astonished at all the wonderful things that became available to us. We've always been active. But, we would never have visited the Sky Garden Walk or City Farm, nor enjoyed the annual Silver Sunday tea parties, or attended as many concerts and exhibitions, had Open Age not made them all available to a bunch of older people like us.*

*"With the coronavirus, we worried what would become of Open Age and, without Open Age, of us! We need not have worried; while every individual in the Open Age team must have been struggling through a pandemic world far more complicated for them than for most of us members, the mass of possibilities that cascaded into our email accounts was almost overwhelming – and, typically, its first pandemic offerings included idiot-proofed, cost-free instructions to enable us to benefit from the burgeoning online offering.*

*"But alas, some of us don't even have computers/smart phones; others (such as we two) have equipment and systems so old, overloaded and "unsupported" that we sadly can't take part online.*

*"Open Age didn't miss a beat: Jade and Deryn [Physical Activities Manager and Head of Physical Activities] immediately looked for a way to deliver it by phone too and keep us well; physically and mentally. Jade tested a pre-recorded version of our exercise class, but we couldn't hear it sufficiently. Just a week later Jade conducted a 'live' telephone class and she has done so every week since.*

*"As we join the weekly conference call, Jade checks with us (individually) how we have been and how we are, and allows us time for a chat with our old comrades before stirring us to action. It is a source of wonder that, with no sight of any of us, she still "watches" us so closely, and keeps us safe! This is quite a feat - we are well aware that it would not be possible if she did not care enough to 'envisage' us, with our individual frailties, and take-into-account our isolation and increasing age."*

P (65) and her mother S (92)

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## Welcome from the Chair



One year on and we are still living with COVID, and uncertainty, but thanks to the vaccine and the wonderful efforts of the NHS and thousands of volunteers, we can hope that an end is in sight.

It has been a merciless experience, and the Board and I extend deep condolences to the families of members and staff who have lost a loved one to COVID.

As the clouds lift, our thoughts move to the future, and to resuming face-to-face activities. We have carefully laid plans to do that and are good to re-open when it is safe to do so. We know the future still remains unpredictable, and new variants may emerge, so we will remain constantly vigilant and respond accordingly.

For the past year, we have responded to COVID by operating remotely. We have had to reduce our offer but our online and telephone activities have been very well-received by members.

The Board has taken the opportunity to revisit Open Age's forward strategy to include the pandemic's impact on our future plans. Our first priority is to re-open our centres and resume in-person delivery. Beyond that, our experience of delivering virtual services at scale has created new possibilities to expand our reach. Open Age now has the capability to grow its online offer and increase its membership and presence in new areas. This could also generate new income to bolster Open Age's financial sustainability.

I am pleased to report, that through a combination of factors, including the backing of our principal commissioners, the generosity of donors, prudent financial husbandry, and economies in the services themselves, we ended the year in good financial shape. As a consequence, we stand ready and able to re-open venues and resume full member services as soon as we have the green light. However, the post-COVID environment will almost certainly present funding challenges in future, so we cannot be remotely complacent.

I would like to conclude by once again thanking staff for their fortitude, commitment and all their excellent work, our commissioners from Kensington and Chelsea, Westminster and Hammersmith and Fulham for their ongoing support and our donors for their generosity.

I hope readers will enjoy the rest of this report that highlights all the work we undertook over the year.

Dean James



## Message from the CEO

First and foremost, I want to pass on my condolences to anyone who has been touched by loss over the last year. You have suffered the greatest loss in a pandemic that has had an almost unimaginable impact on all our lives.



Last year it felt odd to inform you that I was writing my message from my living room, coronavirus restrictions having been put in place. Never did I think that a year on, I would be here writing this year's letter from the same location.

I am very pleased to report that not only has Open Age navigated the storm, I believe we have discovered new strengths and opportunities as a result.

This year we have transformed our delivery from almost entirely in-person to operating wholly remotely. We are now regularly offering over 130 hours of on-line and telephone-based activities, allowing our members to retain the benefits of participating in group activities in a covid secure manner and from the safety of their own home. While we have supported hundreds of our members to gain the skills and confidence to join on-line activities, some can't, or don't want to access our service in this way. How Open Age works with partners in health, local authority and other charities to support older people to become digitally engaged will be an important part of our work this year and as society starts to open up again.

While rolling out a remote programme so quickly is a significant achievement, this equates to only around a third of our usual programme of activities, an unavoidable reduction wholly due to coronavirus restrictions. We are thankful to our commissioners who recognised that rapid service redesign was needed to offer as much support to older people as possible while they were being asked to limit social contact. This flexibility from commissioners allowed us to develop new services such as our welfare calls, increasing our outreach and support services and much of our Digital Inclusion work.

We had a successful year of fundraising meaning we ended the year in a strong financial position with a healthy surplus. We are already investing these funds to ensure the charity is well placed to maintain and grow our remote delivery, and to develop new income lines to support our sustainability.

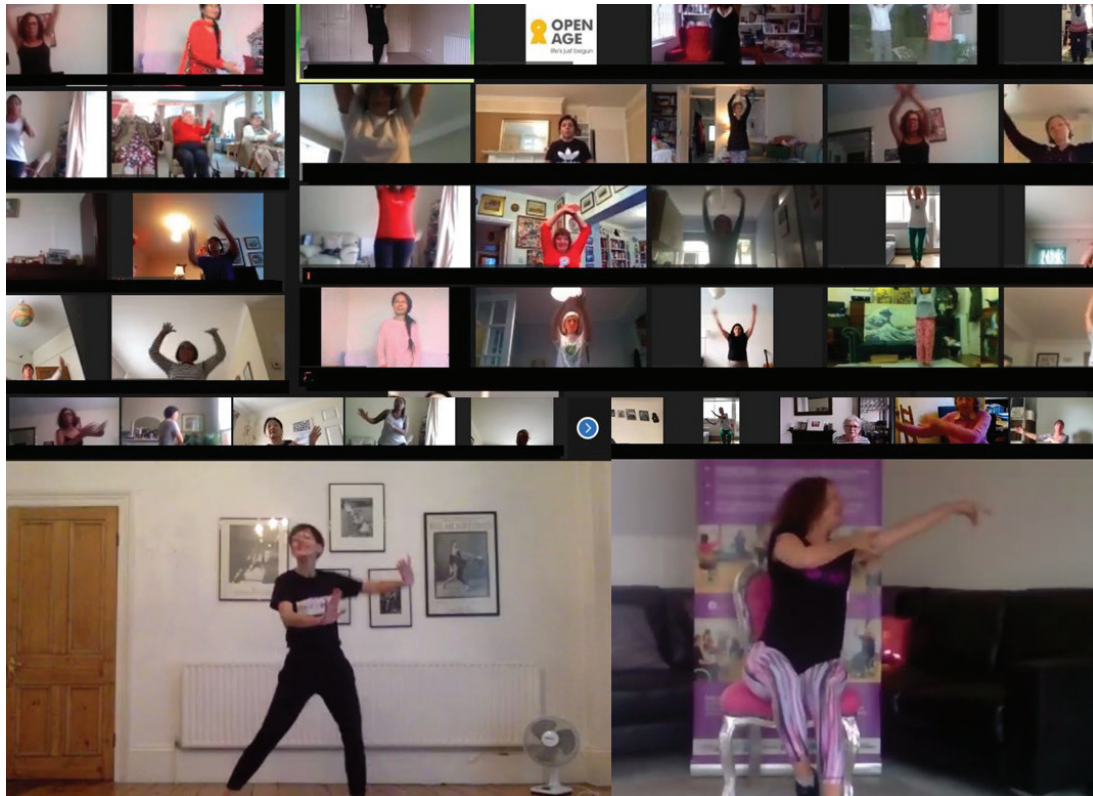
Nothing we achieved this year would be possible were it not for the hard work and dedication of the wonderful staff at Open Age. I want to take this opportunity to thank them all and to say how proud I am to be leading such an amazing team and organisation.

Iain Cassidy

## Who We Are & What We Do

Open Age gives the over fifties a chance to make new friends and to learn and develop new skills and interests. We promote a positive approach to ageing.

*"An essential service is something that gives you a reason to get up in the morning. I know people who can't be bothered to get up because there is nothing to do. You get up at 9am to take part in the yoga and Open Age is providing things like that. It's like brushing your teeth, if you don't they go rotten. If you don't exercise the mind, you've got problems. If you don't interact with people, albeit on a screen, you're going to have problems. So, in my estimation it's an essential service." 71-year-old male living in Westminster.*



77 Open Age Members take part in our six-hour, online Dance-a-thon to celebrate Silver Sunday week in October.

Our activities are specifically designed for older people. They focus on physical and mental stimulation as well as creating new opportunities to socialise, make new friends and to contribute meaningfully in the community. The pandemic has had an enormous impact on the way we do that.

75-year-old J has cared for her sister for over 30 years and has been an active Time for Me member for many years. During the first lockdown she struggled to get food deliveries and we referred her to Age UK. She had no device to access online classes until a friend lent her an iPhone. She didn't know how to use it but a Time for Me phone group session on smartphones remedied that. She has since been able to attend activities, when her Pay-As-You-Go budget allows. J joined the Creative Writing for Wellbeing phone class in June and has been a regular attendee ever since. *"It also has an element of education to it. It's most enjoyable, it completely switches you off from daily life. I hope it continues."*

## Covid Response

### **Between March 17 and 26 Open Age telephoned 4192 members.**

When the government advised everyone to social distance on the evening of March 16th last year, Open Age decided to end all of our activities immediately and prepare staff to work from home. The next day all staff began a mass call-out to inform members.

### **Between March 27 and April 24 we made 4344 check-in calls.**

It was clear the pandemic was going to be especially hard on older people. They were more vulnerable to the virus and the increased impact of isolation and loneliness. Accessing food, medication and utilities were other concerns. We began "check-in" calls to offer emotional support to our members and identify any immediate needs. Many members were very grateful for the calls and said Open Age was the only organisation proactively contacting them.

*"I am very grateful to be contacted by Open Age as I do not have a large community of friends and family checking in on me. And although I am coping, I am lonely and not used to having to stay at home...you've been so kind and really brightened my day."* M, female, age 72.

Most Open Age staff were new to these calls which were often distressing. We trained everyone how to cope and structure boundaries. Importantly, our Outreach and Support team was there to deal with more complex issues including safeguarding concerns. Some members had support networks, so we prioritised those most in need to ensure we were targeting our limited resources.

## Going Remote

*"The fact that you all at Open Age responded so swiftly and creatively to the challenge of the virus and the lock-downs has been of huge benefit to your target group. The word that springs to mind is exemplary and is a role model for other organisations to emulate." H, age 73.*

It took time and effort to enable all Open Age staff to work from home. But, by early April everyone had laptops and we began exploring how we could deliver our services. Our activities have always been very low cost however, we decided early on to drop the suggested contribution. Accessibility was an issue. Before lockdown members could drop into a centre. It was more complicated to access our remote offer. This also involved considerably more administrative work for us. Over time, our funders encouraged and supported this transition.

*"We know that throughout the pandemic, older people have been hit very hard, especially by loneliness and social isolation. We were therefore delighted to be able to use some of our London Community Response Funding to support the work of Open Age and your move to delivering services on-line. The use of modern IT has transformed communication over recent years, but we were impressed with how Open Age built in support and training for many of their older members, to ensure that they did not fall victim to the digital divide. Equally important though was maintaining regular telephone contact with those who prefer that tried-and-tested method. There are clearly thousands of local older people who have found lockdown easier to get through thanks to Open Age. Congratulations!" City Bridge Trust in partnership with the Kensington Foundation, part of the London Community Response Fund.*

## Online

Moving online was a challenge. Many who could benefit most from this technology were the least able to use it. Some of our members were strangers to the digital landscape and others needed to upgrade their abilities.

By early April we had identified Zoom as our online platform of choice. All our teams began to test how we might deliver our activities online and we asked tutors to submit proposals for online courses.

Safeguarding was a big cross-organisational concern. We had to guarantee participants' identity and ensure we didn't get any "Zoom bombing" or indecent language or images. Physical Activity classes had the added challenge of ensuring physical safety.

By mid-April we began testing classes with members who were either familiar with the technology or willing to give it a go. We emailed instructions to access the Zoom room and gave phone support where necessary. All physical activity sessions were with members who had taken the courses before. In total we ran 20 hours of activities reaching 117 members.

Not all classes ran completely smoothly, but feedback was amazing. We also learned a lot about how to help our members online. We therefore decided to begin "How to Use Zoom" sessions as quickly as possible.



Spanish for Absolute Beginners – Summer Term



## How to Use Zoom



French Next Step – Summer Term

We structured these classes to support members who had never engaged in online activity. People chose a session based on which device they wanted to use. Up to six members made a freephone conference call led by one of our experienced IT tutors. The tutor explained how to download Zoom and how to accept a Zoom meeting. The class then left the group phone call and used their device to join a Zoom meeting and learn basic functions in the Zoom room.

*"Downloading and learning how to use Zoom was made easy and straight forward in a friendly session. Doing classes provides a structure to my week and gets me moving ... got me using a smartphone for the first time – alleluia."*

*"I wanted to thank Open Age for allowing us OAPs to move with the future... Thank the tutor for her calmness in the group room, for making everyone feel at ease to understand how a group chat room feels."*

*"Thank you to all of you at Open Age for letting me into the Zoom world. It has really made a difference during Lockdown, it has given me tremendous pleasure and introduced me to new activities that I look forward to and enjoy."*

In June 2020, Open Age surveyed our Zoom graduates. Before the class only one in ten had felt comfortable using IT. After many were ready to keep on learning and also take advantage of our wider programme of Zoom activities. In all, 364 members completed Zoom training.

*"I've just completed an Open Age "How to use Zoom" session ....(it was excellent) ... I'm looking forward to learning more IT stuff and joining the twenty first century!"*

89-year-old P began isolating on March 13th.

*"Open Age had been there from the beginning, offering advice, help and encouragement. Geoff, who I knew from Third Avenue, suggested I should start a regular on-line class. First there was the thorny task of learning to use Zoom. An Open Age class helped, but I still give a gasp of relief when a Host gives me a thumbs up. Geoff suggested History of Art or Greek Mythology. I chose the former. Then there were the Zoom visits to galleries: so many, so interesting, including Sir John Soanes Museum and the Museum of London. I took to writing verses, first of all I sent them to Geoff, who even forwarded one to the National Gallery, who were kind enough to send an encouraging reply. Later I forwarded my poems to Andrea, who always gave such praise to my efforts. I had two most helpful IT lessons, among other things learning to text and also use Airdrop... Thank you so much, OPEN AGE, for being there for us and offering so much support, whatever our interests. I know you'll be there helping us all to face 2021 with confidence and courage."*

## Telephony

Not every member is comfortable with Zoom so we increased the number of telephone-based groups in early May to engage with as many of these members as possible. We even transferred some of our regular social groups into telephone groups and members have reported just what a difference this has made to them, to be able to "meet" with their usual group.

Pimlico Million funded our Knit and Natter phone group.

*"We funded Open Age for a project that was re-shaped due to lockdown and they delivered their sessions by telephone to continue to engage the community and prevent isolation and loneliness. Pimlico Million were delighted that the funding could be used in such a way."* Claire Smith, Strategic Manager, Pimlico Million.

Participants, who had been isolated, were then able to take part in their favourite group activities - sewing and crafts. Knit and Natter allowed friends to discuss life during lockdown and share some of their worries.

*"Firstly, I would like to say thank you to Open Age for putting this Knit and Natter Phone group on for us technophobes. It is a life line for those of us who are not on the world wide web, as they call it. Being able to check in with my friends from the centre is one of the highlights of my week and the fact that we can converse together on one phone line is even better - who would of thought such a thing was possible! Open Age have been nothing but supportive during this difficult time, and the fact that classes are still offered and regular check ins; we are all so grateful that we have access to this amazing charity. Pats on backs to you all."* M, age 72, Westminster.

## Social Prescribing



Members, Students and Staff take part in a discussion about social prescribing and members experience of Open Age.

For decades Open Age has encouraged thousands of older people to become more active, stay healthier and be less lonely. Our members tell us that because of Open Age they access fewer health and care services. Health professionals have long recognised the importance of Social Prescribing such as this and the NHS has highlighted the importance of charities and community organisations in improving the health outcomes of patients.

*"I was moved to contact Open Age because they do vital and innovative work which addresses the social determinants of health to improve the well-being of over 50s. In the post-covid world, this work is more important than ever."*  
Dr Edward Maile, Department of Primary Care and Public Health, Imperial College London.

Last year Dr. Maile invited Open Age to take part in the curriculum for third year medical students as part of innovative new training on the importance of social prescribing. He was eager to continue the collaboration. As the quote below show the medical students really benefited from this project so we are pleased to report we will be continuing to work with Imperial College London again in 2021/22.

*"It was definitely a highlight of my week and some of the stories that were shared really touched me. I don't know if you noticed but I was smiling throughout the call listening to the members talking about how much they enjoy and appreciate the activities. Also, I was really impressed to see and experience the sheer joy and sense of community that Open Age has been able to provide to its members. I highly recommend this session to others and thank you so much once again."* Imperial College student.

## Centres, Hubs & Community Venues

With all Open Age venues closed our Membership Experience Team had to re-write how we work. Most of our team is centre-based. Venues often shaped what we did and how. What's more, much of our work focused on face-to-face contact with members.

The 'virtual world' leaves very little room for social cues and opportunities to nurture ongoing relationships, particularly working with the older age group.

MP, a 61-year-old woman joined Open Age when she was recovering from depression. She felt that it was a place where she did not feel the pressure to compete or be perfect. *"Everyone was friendly - staff, volunteers and members - and there were interesting members and a good atmosphere."* When asked how Open Age has been beneficial to her especially during COVID she said: *"I have learnt a lot and also had fun. I am missing seeing everyone in person, and it's more difficult to interact with people on Zoom particularly in the physical activities, but Open Age has done a fantastic job going forward on Zoom, and this has been very beneficial during these difficult times, particularly during lockdown. It has also given me the opportunity to try new activities such as Chi Gong and Theatre Discussion. With the latter I feel that I have made some new connections and feel part of a group with people I might not have otherwise met, as well as really benefitting from the discussions and different insights of the group."*

The loss of face-to-face social interaction left many members feeling disengaged from their local community. Open Age has had to work harder to encourage members to stay connected to their wider Open Age community.

## Arts, Culture and Social Activities

During lockdown Open Age continued to host a range of creative and cultural activities. We slowly expanded remote classes and looked at other ways to appeal to a broader spectrum of members and to engage as many of our community as possible.

Prior to the pandemic Open Age regularly hosted guest speakers on a broad range of subjects. They would talk about their organisation, share information and tell members about local opportunities to help them better connect to their local community. Our remote speakers' programme, Open Space, grew out of these social groups.

### Open Space

Open Space has brought us some fantastic speakers and partnerships including the Museum of London, The National Gallery, The Wallace Collection, Historic Royal Palaces, The British Museum, Sir John Soanes Museum, the Jewish Museum, Kensington and Chelsea Music Society, The Whitechapel Society, The Census, Stage text Charity, One You, and the Royal Collection. We've also heard from a bee keeper and a jazz musician – people who love what they do and are happy to share their enthusiasm. We've had a keen audience of more than twenty-five Open Age members and Open Space continues to be a great connection to outside places of interest and topics whilst we are still online.



Open Space



Lockdown has devastated the arts and culture community. With venues closed, we wanted to work with partners to enable them to connect with their older communities. It also helped the membership feel engaged with local culture.

*"At the start of lockdown, we particularly wanted to reach out to people struggling with isolation and loneliness. Open Age gave us an opportunity to make a real difference in those awful first months of the pandemic... Memoir Writing workshops with Open Age members were very much in sympathy with our belief that the uncovering of past experiences gives people inspiration and new ideas for the future. We've been delighted to hear such positive feedback from participants."* Mathew Morrison, Senior Lecturer at the University of Westminster and Creative Producer of the Soho Poly.

*"I thank God for this course. Being on the shielding programme, it helped me not to feel excluded from society. It gave me the opportunity to spend good quality focused time learning and crafting an art form. Having these workshops motivated me to continue pursuing my desires to write and hopefully publish a book/s someday soon :o) Also it was very inspiring to learn, work, share and discuss our work, the art form and the publishing stage with other like-minded people."* (SP, age 71, Westminster)

Open Age members liked these Zoom workshops to celebrate the archival and historical work of the revived Soho Poly so much we ran a second series. In 2021 we will be the key partner representing older people working in collaboration with the University of Westminster's 'Soho Poly' and the Rupin Agency.

In October Open Age partnered with The Courtauld Gallery to deliver a 5-week project to Open Age members. Focusing on a different theme each week, members had the opportunity to take part in discussions and practical activities inspired by some of The Courtauld's best known works as well as some hidden gems. The workshops covered various art forms including pencil drawing, collage, textiles, painting, and Art History.

Open Age member Vicki Sanders talked about the workshops on Vanessa Feltz's BBC Radio programme.

*"I'm not an arty person at all but it has made me more interested in art. But it was about more than that, it was about the connection with other people and having conversations and learning and sharing. And it was about bringing London back into our lives because we couldn't visit a gallery but The Courtauld Gallery could come to us, so it made me feel less locked down and isolated and lifted my spirits."*

## Christmas under Covid

We at Open Age were very concerned how our members would cope during the holiday season. As December approached we focused on how we could make Christmas a happy and active time and reach out to our more isolated members during our term break.

To help members without internet stay creative we partnered with the Royal Institute of British Architecture to deliver a creative box.



The 30-day 'creative workout' inside provided daily challenges for members to complete and a printout of a walk centred around the Avenues Centre suggesting points of architectural interest with space for comments and a sketch. The box also contained an envelope and a stamp for members to share their work with Open Age or a friend.

Working in Partnership with Age UK Kensington and Chelsea and The K & C Christmas Collective, we arranged to send Christmas boxes to forty members living alone in Kensington and Chelsea. We also worked with Holy Trinity Brompton to reach out to similar members in Westminster. This was part of the national initiative called Love Christmas to help spread the power of practical love, hope and kindness to people struggling over the winter.

In a first for us, we ran the first of two creative competitions to encourage our members to stay creative over the term breaks. Over Christmas and New Year, our writing competition asked members to write a letter to themselves one year ago.

Zoom sessions continued most of the way through the festive period and included a Christmas Day karaoke. Staff members made phone calls on Christmas Day to the more vulnerable members to ensure they spoke to someone.

To bring some much-needed community festive cheer we teamed up with The Old Vic. 'Twelve Days of Christmas' invited staff, along with members and friends in the community, to send in a video singing 12 Days of Christmas. We then created a montage which we launched on our website and social media channels just before Christmas.

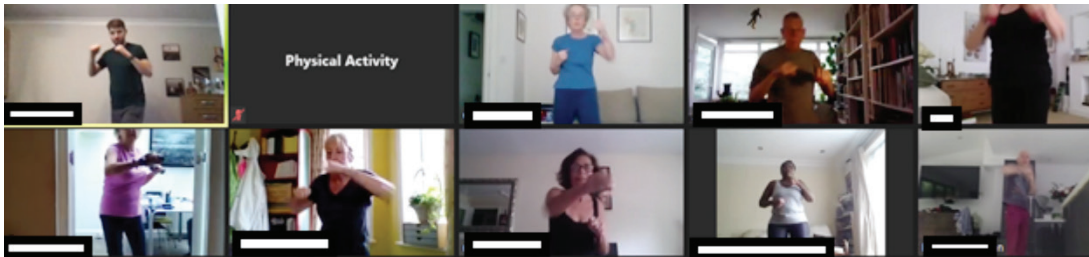
And finally, Open Age hosted our Christmas Extravaganza. Bus Pass to Broadway invited members to watch their Christmas special. Before the pandemic this group had hosted a weekly class at the Second Half Centre that combined show tunes and tap dancing and would then perform at the end of term parties. Opera Holland Park Recital invited members of a more classical bent to join a wonderful Christmas Carol Special, led by the singers. The American School London delivered an orchestral and choir piece and a virtual FAME. To challenge members quick responses, we held our Christmas Quiz and finally staff and volunteers presented our Open Age Panto – Cinderella.



Christmas Staff Panto on Zoom: Cinderella

## Physical Activities

After ceasing face-to-face delivery, it was clear from our 'check-in' calls, that members wanted and needed some form of remote Physical Activity. Ensuring a safe transition to remote delivery was critical. Even more so for our clinical exercise offer.



### Clinical Exercise Programmes

Open Age's clinical exercise programmes focus on specific health related goals such as improving one's balance, or reducing the perception of breathlessness. Members taking part are more likely to have complex health issues.

P is an 86-year-old woman who joined the Healthy Lungs classes at the beginning of 2020 following several severe asthmas attacks in 2018 and 2019: *"The classes have made a very great difference to my life and my health; my body is now much stronger and more flexible and my lung capacity has increased. During lockdown the classes contributed significantly to maintaining my positivity and mental resilience. Hansa's classes are enjoyable and demanding; I always feel stretched but never over stretched. Hansa also explains particular exercises and their benefits, which I find very helpful. I'm confident that am being taught by an expert. I have given similar feedback to my GP who originally recommended that I join the Healthy Lungs classes because many other asthma patients could benefit from them. It is not an exaggeration to say the Healthy Lungs classes have been life-changing for me."*

We began delivering weekly classes in May and June. At first, to ensure a safe transition, only those who had already started the programme in person were accepted onto the remote classes. This also allowed them to maintain their physical improvements.

An additional member of staff was present in the Zoom sessions to provide tech support and for additional safety of the members. When staff members delivering the sessions and members were more familiar and confident using Zoom, this was no longer necessary.



Once the clinical exercise team were confident in the safe and effective delivery of remote classes, we were able to accept new referrals. Due to the effect of the pandemic on our usual referral routes, the clinical team have had to promote the programme creatively by targeting emails to Open Age members, offering trial classes and delivering educational sessions in partnership with other Open Age activities. We also made hundreds of phone calls and sent as many emails to invite more members to join the remote programme. About three hundred members responded. Some preferred not to join remote classes so we sent them a Home Exercise Programme. This way they could continue with some activity during the lockdown.

*"I just wanted to thank you again for the great improvement to my general health, thanks to Osteo Blast. The other day, I took a bath and whereas I in the past I used to have to roll over onto my hands and knees in order to get out, I can now do so in the normal way due to my improved upper body strength. I'm also much steadier on my feet and feel that I won't fall on the street." J, age 79.*



Steady and Stable

R is 63 years old and had recently been diagnosed with Parkinson's disease. She had noticed a rapid decline in her physical ability and confidence and self-referred onto the Steady & Stable programme in November 2020. Initially R would perform a lot of the exercises in a modified seated position due to her reduced confidence and finding coordination type exercises challenging. After attending 8-10 weekly sessions she started to perform the majority of the exercises standing, and reduced her reliance on holding on for support. Her coordination and movement improved immensely in response to regular targeted exercises. As a result, she reported that her confidence had improved after noticing her physical ability had also improved.



Attendance during the pandemic was more consistent than before. This indicates the value of these classes during such a challenging time. In addition, some of our frailer members find it easier to attend remote classes than to travel to a venue.

## General Physical Activities

*"Armand looked as though he had been teaching in this way all of his life, such a lovely welcome for everyone as they came online, superb technique at breaking down the steps, 100% energy and positivity (so necessary, especially at the moment) and fun. I enjoyed it immensely, became engrossed, forgot the woes of the world, and came out energised ... the first time in months. Cannot thank you all enough."* S, a 67-year-old woman.



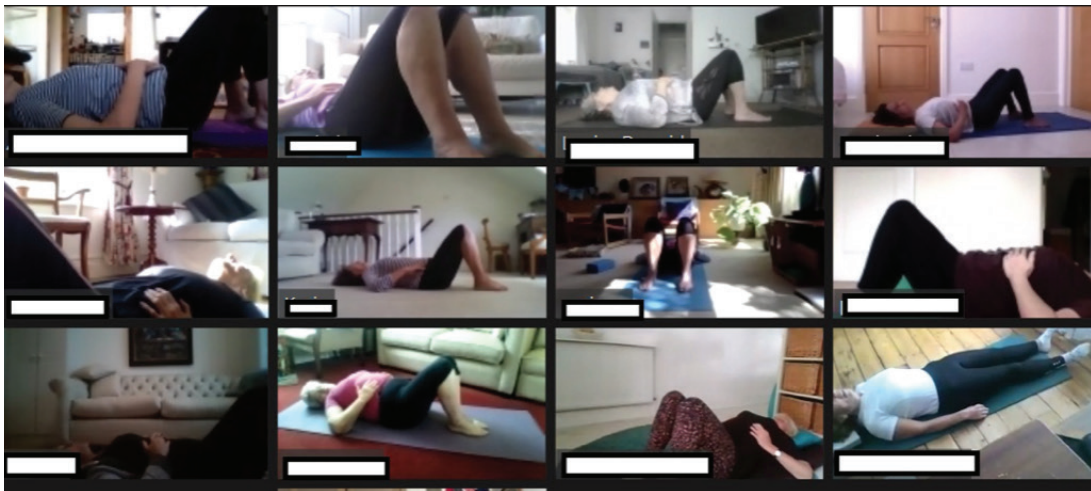
Sizzling Salsa

Our journey to creating an initial programme of more than thirty weekly physical activities began with testing a Latin Dance and a Pilates class back in April.

*"I've just sent a text message to my daughter in-law to let her know I've just done a live Pilates session on Zoom. My sons are forever telling me I don't know what I'm doing on the computer. But I did it! The instructions in the email were so easy to follow. Thank you for making it possible."* M, a 78-year-old woman.

Demand was high and by the end of May we offered a wider variety of classes on Zoom, including Boxing, Chi Gong and Step Up from Steady. Lockdown measures continued into the winter and members needed to remain active and fill the day with purposeful activities, so we increased the programme.

*"I also wanted to let you know I'm enjoying the Zoom classes I do. With something to look forward to it breaks up the monotony and boredom and also gets us moving. It's so easy to sit on the sofa all day if there are no activities. So, pass on thanks as I know it's taken a lot of time and effort to set this all up. It is appreciated." J, age 78 from Westminster.*



Pilates

Not all members had access to Zoom so we tested an exercise group over the phone.

Members soon asked for exercise videos which they could do in their own time. We developed our YouTube channel. This now includes thirty-seven videos and has received over 3500 views. Viewers included members with no Zoom access.

*"Thank you so very much for the online videos. I really value these, especially as my laptop has failed to work but I can access these through Miracast on my TV. They are excellent. You are all doing an excellent job and I really value everything you do." PS, age 76.*

In the lead up to **Silver Sunday** we partnered with **Step Change Studios**, a pioneering dance company committed to making dance accessible for everyone, to create a dance montage. Participants had access to the routine beforehand and could learn it in a workshop. More than fifty submitted their rendition of the routine which was then edited to form an uplifting montage. Check it out at [https://www.youtube.com/watch?v=1HwYg\\_SnpH8](https://www.youtube.com/watch?v=1HwYg_SnpH8)

Once restrictions allowed, we began offering activities in local outdoor spaces. Members who had not engaged in our remote offer were able to increase their activity levels again with walks and classes including Exercise to Music and Awareness Through Movement. Feedback was extremely positive and we look to expand the outdoor provision for the following year.

### Challenges:

It was difficult to reach members who did not often use email or were not taking advantage of the remote programme, despite attending regularly before Covid-19. Staff sent texts and made phone calls to inform members of available activities that did not require internet access, including the phone groups and outdoor classes. This was successful, both for advertising these classes and for understanding the reasons why members were not engaging, but it was extremely time-consuming.

### Achievements:

Open Age received the **ActiveWestminster** mark for another two years. This recognises that we provide high quality physical activity and meet a range of quality standards including health and safety, coaching qualifications and insurance. We also won the **One You Westminster Award** in December 2020 which recognises projects which have made a difference to adults' health and wellbeing through physical activity.



Exercise in local outdoor spaces



## Adult Community Learning

Jill's story illustrates what ACL offers our members.

Jill and her husband Neil have enjoyed Open Age for several years but when she began working from home during lockdown she had the opportunity to do more. *"I asked my boss if I could join the Spanish ACL class during working hours, as we had to furlough our Spanish expert in the team and this was a wonderful opportunity to brush up my language."*

In the Autumn ACL became a real lifeline. *"I was suddenly made redundant. It was a huge shock. The increasing number of classes offered by Open Age on Zoom played a major part in my adjustment to the loss of my career. Classes and talks gave me a focus in the week and made me keep up with a disciplined timetable during the difficult days of continued lockdown."*

There's more: *"I decided it would help my future prospects if I knew how to build a website so when the chance came to join an ACL class with Lena, I leapt at it. Another participant who had been in Creative Threads class with me suggested I use all my crafting attempts as the subject matter for my site, so that was the inspiration I needed."* You can visit Jill's new website here: <https://jillpoppygirl.wordpress.com>

ACL gave Jill more opportunities to expand her skill base. *"I have been training as a volunteer tour guide for virtual tours of the David Parr house in Cambridge, again to widen my experience and potentially to help me look for a new job in a new area. Angela was kind enough to get me onto the How to Host Zoom course and this really helped me when I had to conduct my first virtual tour in June."*



It wasn't all about work. *"I have never done art, not even at school (my parents made me do physics instead, which I failed!). So, when the chance to try sketching came along with the ACL 'Sketching in Sculpture Parks' class during the January lockdown, I thought it would be good for me to have a go, now I had so much time on my hands and nowhere to go and no job to do."*

*"They also gave my husband and I chance to attend a fun class together for the first time and we started with Danielle's wonderful Disco Fever - we are now in our third term and have made good friends with the others, and have recently met Danielle in real life, for a visit to the cinema and coffee and chat together afterwards, such a joy... So I am incredibly grateful to Open Age, it has helped me through a difficult and testing period of my life and kept me (and Neil!) positive and hopeful."*

*"We recognise the additional impact of Open Age's adult learning through the pandemic – being a point of contact for potentially isolated residents who were shielding during the lockdowns, and the benefit of delivering significant amounts of digital skills development programmes to support residents' ability to join online services and courses. We have been impressed with our partners' ability to deliver online during the pandemic and Open Age has risen to that challenge well. Open Age's work during this time has proved critically important during the Covid-19 crisis enabling people to stay safe and interact with services they need, to shop and to interact with others."* Harriet Duncan Adult Learning Manager, Economic Development Team, RBKC



Build your own website – summer term

After testing in April, our Zoom classes were up and running in May. Our IT offer is designed to help bridge the digital divide, and ensure that members are able to take full advantage of technology. During lockdown it was needed more than ever. In June we added even more courses for IT/ digital skills, including: Build your Own Website; Excel for Beginners; Improve Internet Skills; iPad Art; Microsoft & Touch-typing; Social-Media; Making Video Calls to Family/Friends; as well as courses to extend members knowledge and confidence with the Zoom platform such as Further Functions for Participants using Zoom and How to Host a Zoom Meeting.



## Challenges:

Adult Community Learning classes provide more structure than our normal drop in offer. Most of our wide variety of non-qualification-based courses run for 10 weeks. Participants are expected to make a commitment to attend all the sessions and complete an Evaluation Form at the end of term.

During lockdown a huge impact has been the higher administrative time that is needed. We are sending many, many more emails to members: to invite them to join the course with the Zoom link; reminders of the start of the course; follow ups if classes are missed; requesting course evaluations; and providing members with lost course links. Prior to lockdown a member would need to complete the required enrolment form before starting on an ACL course. Since lockdown the priority has been to get members to the classes and then we follow up later to get completion of the enrolment form over the phone. It is time consuming but without a completed enrolment form we cannot draw down the funding that makes this work possible.

We have been very much aware that the ACL programme has not been able to deliver its 'core' programme of complete beginners' courses for PCs, iPhones and iPads. Building digital skills and confidence for all our members is a huge challenge and we cannot wait to get started once we return to the Centres.



French Next Step – Summer Term

## Achievements

With lockdown we quickly set up the How to use Zoom sessions with a structure to support our members to download the application and learn some basic Zoom room functions so that they could enjoy the activities that we had to offer.

Despite lockdown ACL has maintained its breadth of delivery on the Zoom platform. We also strived to create an atmosphere on line that replicated a virtual class so all could see and hear each other. This is illustrated through feedback from JF, aged 62 – *"I like the fact that as well as the class being good fun and good exercise, the teacher sets aside some time for us to talk as well, which makes it interesting and more like a class taking place in the real world."*

We have engaged with members who were not able to attend at the Centres prior to lockdown – MM, aged 87 *"The weird times we are living in have turned out not to be all bad. I am afflicted with an arthritic hip which makes getting about a serious challenge. Doing lessons on Zoom enabled me to take on this course, Windows 10, and Shared Reading..., which I am enjoying hugely"*.

In December 2020 we introduced course evaluations for members for the Autumn term online and did the same for the Spring term. Members were sent the link to the course evaluation survey in their last week of the course.

From September 2020 to March 2021 all ACL courses were delivered online maintaining the variety of different subject areas for members to engage with.

Member evaluations received for the Autumn term (September to December 2020) showed:

- 97% said the course met their expectations;
- 28% had said their confidence had increased;
- 36% were more motivated;
- 92% were going to do another Open Age activity the next term;
- 81% said their IT skills had improved.

Member evaluations received for the Spring term (January to March 2021) showed

- 98% said the course met their expectations;
- 22% had said their confidence had increased;
- 38% were more motivated;
- 85% were going on to do another Open Age activity;
- 75% said their IT skills had improved.

### **Partnerships:**

We actively continued to maintain the strong working relationship with the Adult Learning and Employment Service (ALES) team at RBKC throughout lockdown.

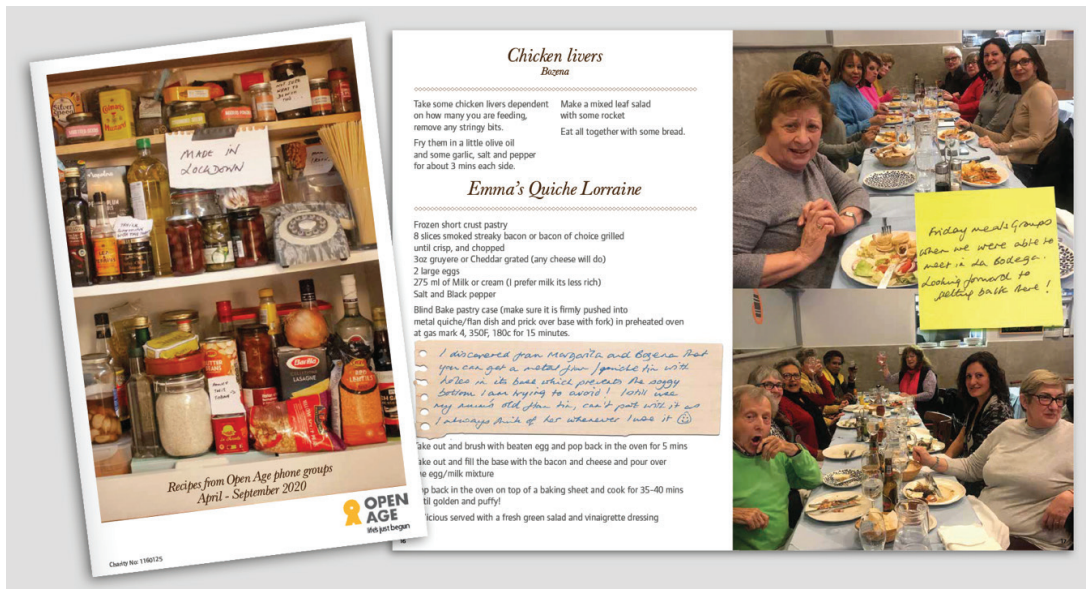
Just before lockdown we had started to use a classroom at Morley College who took over Kensington and Chelsea college and we wanted to build on this in the summer term. We are continuing to grow this relationship through being involved with the Morley College Stakeholders Group.

# Outreach and Support

Outreach & Support gives people who need extra help a way into Open Age: Time 4 Me (TFM) provides activities and support for unpaid carers; Phone Groups cater to those less able to get out or go online; Link-Up Service and Link-Up tech support provide one-to-one help and Men's Space reaches out to older men.

## Social Phone Group delivery 2020-21

The story behind Open Age's Made in Lockdown Cookbook illustrates our creativity in adapting to life under Covid. Outreach & Support has run phone groups for years and we have also hosted long-established social groups.



During the weekly call members often talked about what everyone had been cooking, and about how food connected them to each other and to their friends and families. Lockdown restrictions meant that it was tricky to get ingredients, so often there was a lot of creativity. Favourite family recipes were adapted and new ones dreamt up to make use what was lurking in the backs of kitchen cupboards. 'Made in Lockdown' was born: a record of how our community came together to support each other during a remarkable time.

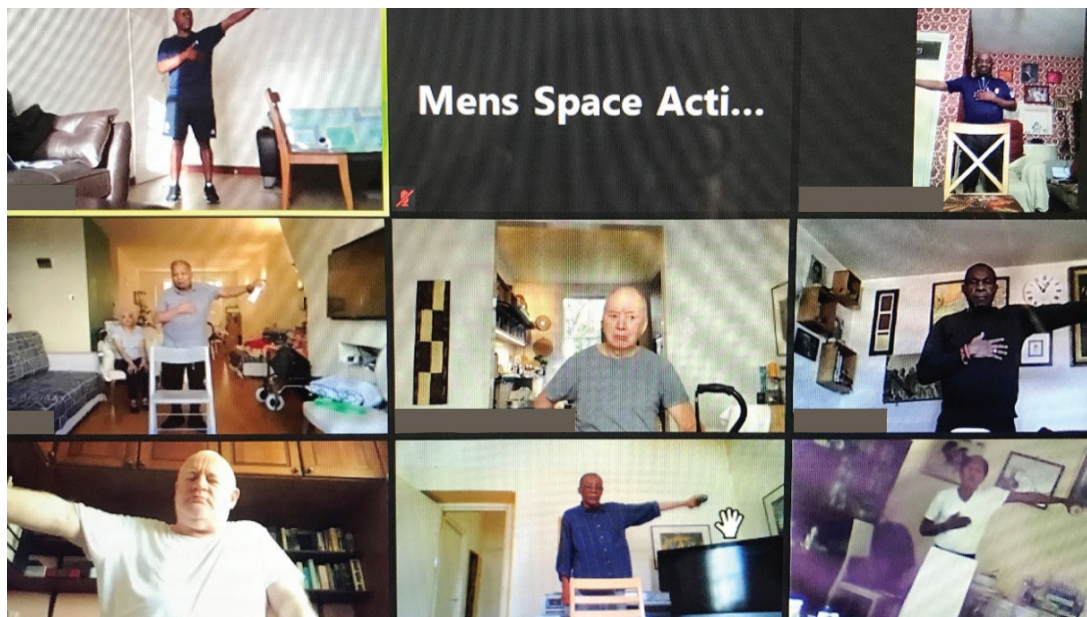
75-year-old Mr. A had been advised to shield due to his health conditions. This increased his anxiety. "I had been self-isolating and was anxious about having to shield because of my health issues, however, the weekly cooking phone group has given me something to look forward to and the chance to cook again." Mr. A says he used to buy a lot of prepared meals now he cooks for himself several times a week and feels much better for it.



## Men's Space

Older men remain a particularly hard to reach group – often leading to social isolation or a fear of seeking support. We address these difficulties by maintaining relationships with each member, undertaking follow up calls and paying special attention to any barriers they may encounter. Though it has been a difficult time during this pandemic in terms of engagement, we continued to provide a safe space for men to stay connected through regular weekly welfare calls. The Men's Space facilitated a number of member connections - with the consent of each party – so that they could keep in touch with each other and further build friendships with each other.

We were unsure if Zoom would work as a platform for Men's Space. However, Men's Coordinator Russell pre-tested the app with one or two men. We followed this with extensive support for some of the men and were able to build a weekly men's exercise session on Zoom. We added challenges as the sessions progressed to help those who would benefit. We also introduced breathing techniques to help with anxiety and energy levels. This now features as a regular part of the men's exercise on Zoom. Online access means some participants who could not attend in person can now take part.



Men's space activity class

*"Open Age provides a wonderful service to our community by engaging older men who might otherwise remain isolated. We are enthralled by the way Russell John is so devoted in leading his group and has made such a success of Men's Space. We are proud to be associated with such an important programme for older residents of our community."*

Julia & Dani of The Grove Trust.



Mr. O, a newly referred client to the Men's Space is a wheelchair-user and socially isolated. He has a diagnosis of a progressive spinal condition and is doubly incontinent and has been having difficulties coping with his situation. Through regular welfare calls it came to the attention of the Men's Coordinator that Mr. O is from the same country as another member of Men's Space who had participated in numerous activities at Open Age pre-lockdown. Following GDPR guidelines and consent by both parties, we eventually managed to facilitate an initial telephone connection and they are now having regular telephone catch-ups. *"because of my health condition, the only people I talk to are nurses, my GP and home helps, and you at Open Age, Russell. It has lifted my spirits so much now since I have connected to my new friend, we have so much in common and when he rings we spend a lot of time reminiscing about things we have in common. My mood is much lighter now and I look forward to hearing the phone ring and talking with others."*

### **Time for Me**

Time for Me (TfM) gives older carers in RBKC and Westminster a chance to have time for themselves away from their caring role. During the pandemic Time for Me has provided online classes and telephone support.

R, age 79, a long-term carer, regularly attended prior to her husband's health deteriorating. It became increasingly difficult for her to leave him for long enough to take part in activities. She only did occasional trips, and we saw less and less of her. We persuaded her to try TfM online activities. She started just doing the monthly Relaxation class. Although she sometimes had to leave half-way through to do things for her husband, she attended regularly. We encouraged her to try more classes, and she now also attends Yin yoga and Chi Kung. She, like many other carers who regularly attend online, expressed concerned when she thought these sessions may come to an end. We reassured them online sessions would continue, as we know they are the only way that some carers can participate. *"Excellent my stiff shoulder's much better after days of your exercises."*

## **Partnerships fostered by the outreach team during 2020-2021**

We developed a relationship in partnership with Grenfell Health and Wellbeing Service over this last year to respond to an identified need from one of our long-standing phone groups. None of the participants had internet access and they were struggling with social isolation and the impact of Covid-19 on their mental health. We invited Grenfell Health and Wellbeing service to talk through some of the issues and to look at strategies to help. This session was well received and we recognised a need for ongoing support.

Since August 2020 Grenfell Health and Wellbeing arranged for those members to meet face to face at their site for psychological support and coping strategies. Seeing each other face to face which has been invaluable for them. The phone group with Open Age has also continued on a weekly basis.

This relationship continues with regular communications between the Link-Up Coordinator and the Psychologist and on organising transport for members to attend. Grenfell Health and Wellbeing Service recognised a gap in meeting the mental health needs of older adults and they have now adapted to provide more flexibility and reach out more to older adults.

### **Challenges:**

- During the initial phase of the first lockdown the scale of the support needed was significant, particularly as the pandemic progressed. This was the experience across the organisation as everybody was involved in delivering welfare support calls. We were hearing of the high anxiety levels among many members we contacted and staff were reporting offering regular calls to bereaved members and their families.
- Technology: lack of a device to connect to Zoom activities, access to Wifi and digital skills were key issues. Whilst Open Age offered a plentiful supply of 'How to Zoom' classes, the group approach did not work for some.
- Some members did not want to attend anything Zoom related even if they were given a device. For many of these the phone groups have proved to be a life line.

### **Achievements:**

- Our flexibility and speed in adapting our long-standing phone groups and our ability to help pave the way for a more extensive Open Age phone group offering. A very valuable offering for those who were unable to connect on Zoom. For some presenters (e.g Red Cross, National Gallery) it was their first phone group experience.

- Our ability to continue provide a safe space for men to stay connected by maintaining relationships with each member, undertaking follow up calls and by paying special attention to any barriers they may encounter. We also facilitated a number of member connections so that they could keep in touch with each other and build friendships.
- The head of Outreach & Support leads our Safeguarding team which supports and advises all staff on Safeguarding matters. During this year we have been part of 'Developing Best Practice' groups organised by the Adult Safeguarding Boards across the three principal boroughs in which we operate. This has allowed us to feed into plans of how Safeguarding can be made more accessible to local residents, both in their understanding of what safeguarding is, emerging trends, and how as a community we might begin to address these and plans for the future.
- We developed 'Link-Up Tech Support' to provide one-to-one advice to technically challenged members. This approach has gone from strength to strength and in addition to face-to-face support, when guidelines permit, we host an online 'Trouble Shooting Tech' session every week. This enables members to learn about fixing other issues that may arise even if it isn't the issue they had. We helped more than 250 members with a wide range of tech related issues enabling them to progress and join activities.



Lena Dekair, Link-Up Coordinator and Link-UP Tech Coordinator helps navigate the functions of Zoom

## Employment – Work Routes 50+

When G started on Work Routes she wanted a job in Project Management. We referred her to a Women Returners Programme to explore the gap in her international experience in this field. We then suggested she explore setting up her own business. After a course at a local college which provided a mentor, G set up her own Digital Marketing Business during lockdown. It is now a thriving business and she has never looked back!

Open Age's employment programme helps unemployed over 50s people back into work. The programme is run in partnership with Reed and funded by the Department of Work and Pensions. We recognise the diverse needs of the 50–65 cohort in the context of job sector changes and increased State Pension age.

Y has a background in engineering but had not worked in her field for 15 years due to issues with her immigration status. She worked as a cleaner to keep her afloat but sought a stable career to be independent of the benefits system. Y wanted to become a train driver but those jobs are hard to come by and she was happy to work for TFL or similar companies at entry level on a full-time basis. Y successfully applied for a "get into transport apprenticeship" and soon began work as a TFL Guard.

*"Thank you for your great support and dedication in supporting those of us that had almost given up on getting good jobs. I am enjoying my training for now as a Guard onwards to being a train driver. Open Age was really helpful and I am glad to know I can get continuous support when needed."* Y

During lockdown we faced reduced referrals, the risk of members catching Covid-19 and dramatically reduced job opportunities. Fortunately, we were in a strong position to withstand these because we had out-performed our targets for the first quarter of 2020.

We adjusted well to this new way of working, piloting a Networking Group for Professionals on Zoom and began interview skills training via Zoom and phone. We have continued to engage with our members on a one-to-one basis. We combined Preparation for Employment Activities with Health and Wellbeing Sessions and encouraged our members to take up free online courses via Reed and other providers.



### **Achievements:**

We started sixty-six new members on the programme and continued to work with members engaged prior to April 2020. Although job outcomes were down on previous years, we still managed to help twenty members into work during this period despite the pandemic.

M worked for some of the top banks in the City of London for 25 years in Fixed Income Derivatives Sales but was struggling to return. He asked for our assistance to work in that sector or transfer his skills to another sector. We reviewed his CV and job goals and held a one-to-one motivational intervention. M quickly found a niche job as a RegTech Engineer with a local company.

*"I would like to thank Natalie and you one more time for all the precious support you provided. It may not have resulted into direct job opportunities but the opportunity to go through the process in a friendly environment has been highly useful and appreciated. It is a great job to help other people find their job; it is very often the right job at the time."* M

In response to changes in how employment support for 50–65 year olds is commissioned, and taking into consideration the impact of the pandemic on employment support more generally, Open Age is currently reviewing the services it offers in this area. We will report further next year.

## Monitoring and Evaluation

Monitoring and evaluating is core part of what we do, and we have well established ways of doing this. However as with almost every other aspect of our work this year, the pandemic has meant we had to approach things differently.

It was necessary to completely reconfigure our services in April to move online. While we got positive feedback from some members, we had to check that this new way of delivering was working. We also wanted to hear how lockdown was affecting our members and if our remote programme was helping them cope. We conducted a brief survey in June and received 318 responses.

- 63% of members felt that lockdown has had a negative impact on physical health
- 65% of members believe Open Age's virtual activities have helped improve mental wellbeing
- 88% of members who have taken part in physical activities say that the classes have helped maintain or improve physical wellbeing
- 50% of members would continue to attend remote classes after restrictions are lifted

In 2019 we used an online survey, for the first time, for our Annual Evaluation. We did however still allow members to use a paper-based version if they preferred. This year that simply was not an option. However, we really wanted to make sure that everyone had the opportunity to take part. So, as well as sending the link to the survey to all members for whom we had an email address, we also made time in each and every Zoom session to promote the survey and ask members to complete it there and then. We also asked members taking part in phone groups to "fill out" the form by phone.

We reached fewer of our members than usual which has been the case throughout lockdown. We did however manage to get 679 responses, with over 570 having taken part in at least one remote activity this year. And this is what they told us:

As a result of joining Open Age

- 78% of members reported improved wellbeing
- 65% of members have increased energy
- 46% of members have more friends
- 77% of members are more motivated
- 61% of members level for physical activity improved
- 60% have increased confidence

In addition:

- 34% of members reported fewer visits to their GP
- 32% of members reported fewer visits to hospital or Community Services

The infographic on the next page gives even more information about what we achieved this year.

# **OPEN AGE** 2020–2021 in numbers

# 8,000 CALLS

to members at the start of lockdown in 2020.



As a result of joining **OPEN AGE**:

**78%** of members reported improved wellbeing.

**65%** have increased energy.



**46%**  have more friends.

**77%** are more motivated.



**1,611**  
members took part in at least one session

**4298**   
We ran 4298 activities in the year 2020-21.




**40,348 individual attendances** across the year.

**364**



We trained 364 of our members how to use zoom – by phone!

**61%**   
increased their level of physical activity.

 **60%** have increased confidence.

**34%** reported fewer visits to their GP.

**32%** reported fewer visits to hospital or community services.



“ I’ve just sent a text message to my daughter in-law to let her know I’ve just done a live Pilates session on Zoom. My sons are forever telling me I don’t know what I’m doing on the computer. But I did it! ”

## Goals for 2021-2022

- To maintain a blended remote and in-person delivery model that is flexible enough to adapt to any future restrictions while still delivering an excellent service for our members.
- To increase our focus on Digital Exclusion among our members, concentrating on how to make remote participation more accessible, in case of future restrictions.
- To develop and build a new Customer Relationship Management (CRM) system.
- To further develop our financial modelling and reporting, and test new automated payment and accounting processes and systems.
- To continue to implement our fundraising strategy, developing our Trust and Grant programme, and investing in new areas of giving.
- To advance our work in evidencing the impact Open Age has for our members. This will support our fundraising efforts and our wider influencing work with commissioners.

Open Age responded to the pandemic by going remote. This was revolutionary but the “digital by default” reality created barriers for some of our members. However there have been unexpected benefits of developing an on-line offer and we now know that some members prefer engaging with us remotely. We believe there may be an opportunity for us to grow this area of our delivery.

This year we will retain some aspect of remote delivery for those members who find this easier. This will facilitate our response should new restrictions be imposed. Our new CRM system will reduce the administrative burden associated with our remote offer. This will also improve our reporting capabilities and put us in a better position to expand this aspect of delivery if needed.

We will continue to streamline our financial process. Also, as part of our drive to diversify our income stream, we will begin to develop costing models and methodologies to be able to grow our offering and expand our geographical reach with a mix of delivery options.

We continue to make progress in implementing our fundraising strategy and our focus on growth. Last year we recruited an entry level Trust and Grant Fundraiser. We will continue to support their development with external mentoring. In addition, we will hire an experienced Major Donor fundraiser to develop a new area of giving for the organisations.

Finally, we continue our work to better evidence our impact and this year we hope to secure a research and evaluation partner to assist us with this work.



## Financial Review

Open Age's income for the year totalled £1,616,157 (2020: £1,829,036) of which £1,436,285 (2020: £1,466,654) was received as grants and income from contracts. The main sources of income for the year were: The Royal Borough of Kensington & Chelsea, whose various departments provided £564,697 (2020: £630,262); Westminster City Council £259,957 (2020: £289,268); multi-borough grants £240,000 (2020: £308,000); and other income from various funders, earned income and donations made up the remaining £551,503, as detailed more fully in these accounts. A number of other funders directed their assistance to specific projects. These have been separately identified in the accounts. See the Statement of Financial Activities on page 49 and the accompanying notes, including restricted funds, on pages 52–71.

Where specific funding received was insufficient to meet the expenditures of the specifically funded activities, additional funds have been transferred from the unrestricted funds of Open Age to eliminate the resulting deficits in the specifically funded activities at the end of the financial year.

The main expenditure of Open Age is on staff salaries and on supporting office accommodation and facilities. Costs have been allocated to activities on the basis of estimates prepared by staff.

Open Age ended the year with a surplus of £95,304 (2020: £141,771). Cash, bank and deposit balances totalled £970,630 (2020: £764,369). Total fund balances available to be carried forward were £1,451,250 (2020: £1,355,946) consisting of £105,578 of designated funds (2020: £69,837) which include £80,000 set aside for the development of a new CRM / booking system; and £801,146 of general funds (2020: £697,534); and £544,526 of restricted funds (2020: £588,575), which represents funds held for the remaining lease of the New Horizons building. The full Statement of Financial Activities is set out on page 49 of these accounts, with accompanying notes on pages 52–71.

## Reserves

Given the uncertainty due to the Covid-19 pandemic the trustees have kept the reserves policy under review over the last 12 months. To ensure that cashflow management, working capital and investment needs are met, whilst still allowing us to fulfil our charitable objectives, trustees have agreed that the level of free cash reserves (excluding designated funds) should be kept within a range of £600,000 to £800,000. This is to ensure sufficient funds are held to meet the charity's current and future projected activities and maintain financial sustainability in an ever changing landscape. The board intends to conduct an in-depth review of our reserves policy in 2022.

As at 31 March 2021, the unrestricted free cash reserves stood at £801,146 (2020: £697,534),

## Risk Management

The Board is responsible for ensuring Open Age considers its risks, has a risk register in place and that this register is reviewed on a regular basis. The Board has assessed the major risks to which the charity is exposed and these are detailed below with a summary of plans for managing these risks:

- **A significant reduction or loss of funding from Local Authorities and CCG's.**  
At a time when local authorities and CCG's are being required to make efficiencies there is an ongoing risk that funding directed towards preventative services such as Open Age may be reduced. To mitigate against this the CEO and Senior Leadership Team maintain good relationships with our commissioners including regular review meeting where targets and KPI's are discussed. The CEO sits on various boards and partnerships to ensure prevention stays high on the agenda. Open Age actively engages with other statutory bodies operating in this field to ensure we are well positioned to receive support from other partners should cuts be proposed.
- **Inability to cover infrastructure cost.**  
To reduce reliance on statutory funds and increase unrestricted income Open Age has developed a new fundraising strategy and, from January 2020 employed two fundraisers to increase income from other sources.
- **Loss of key personnel.**  
We have policies and procedures in place to recruit and retain suitable staff and volunteers. We have recently restructured, promoting existing staff into new senior leadership roles and creating a clearer route for staff progression and succession planning.
- **Complaints from Members or Tutors.**  
Open Age has a clear members code of conduct and complaints procedure in place to deal with any complaints. This is overseen by our Head of Member Experience and any complaints are investigated and reported to the Senior Leadership Team.

- **Impact of a pandemic / Covid-19.**

We have developed robust policies and procedures and a specific risk assessment and strategy to deal with Covid-19 and potentially similar future pandemics in order to protect our members and staff and to continue to offer and deliver services to our members in a safe and secure way. (Refer to the Chairman's report for more detail on the impact of Covid-19).

## **Investment policy and performance**

The constitution provides that monies not immediately required for Open Age's activities are to be invested in or upon such investments, securities or property as may be thought fit. At present the Trustees' policy is to place all such monies on interest bearing deposit.

## **Fundraising**

During the year 2020/21 Open Age employed two part time fundraisers and the services Nova Fundraising Ltd who support fundraising and mentor fundraising staff. The two fundraisers are directly employed by Open Age and the Nova Fundraising Consultants used are members of the Chartered Institute of Fundraising (CloF) and adhere to the Fundraising Regulator Code of Fundraising Practice. Open Age is registered with the Fundraising Regulator.

Open Age understands its duty to protect the public, including vulnerable people, from unreasonably intrusive or persistent fundraising approaches and undue pressure to donate. The charity does not work with fundraising agencies for either telephone, or face-to-face campaigns, and received no fundraising complaints during the year (2020: none). As a charity that works with older people all staff undergo formal and informal training on how to communicate with and deliver service to older people. This includes a requirement for all staff to complete adult safeguarding training.

Throughout the year Open Age has continued to be successful in attracting funding in kind, ranging from the free use of premises in a variety of venues such as lounges in sheltered housing, meeting rooms in libraries and community centres, to skilled practitioners providing free or reduced fee tutoring. In addition to the salaried staff, members and volunteers assist with administration and with organising events. The CEO monitors all fundraising activity. The Board of Trustees receive regular reports on fundraising and review fundraising income and expenditure.

# Thank you to all our Funders





# Legal and Administrative Details

**Charity Registered Number:**

1160125

**Date of Adoption of Constitution:**

25th November 2014

**Board of Trustees:**

Elected Trustees

Maggie Pigott \*

Lesley Butler \*

John Henwood \*

Marcia Blakenham

Hilary Bowker \*

Sandra Franklin

**Co-opted Members:**

Garvin Brown

Jean Daintith

Dean James, Chair \*

Eric Kihlstrom  
(appointed August 2020)

Stephen Souchon, Treasurer \*

\* Also members of  
the Finance and Staff  
Sub-Committee

**CEO:**

Iain Cassidy

**Principal Office:**St Charles Centre  
for Health and Wellbeing,  
Exmoor Street,  
London W10 6DZ**Auditors:**Price Bailey LLP,  
24 Old Bond Street,  
London W1S 4AP**Bankers:**Barclays Bank PLC,  
Willesden Branch,  
Westmoreland House,  
Scrubbs Lane,  
London NW10

# Structure, Governance and Management

The Trustees of the charity present their report for the year ended 31 March 2020. The Trustees confirm that the Annual Report is compliant with current statutory requirements, the requirements of the charity's governing document, and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

## Constitution and Organisational Structure

Open Age was registered by the Charity Commission as a charitable incorporated organisation on the 23rd of January 2015, with a new charity registration number: 1160125.

The Board, comprising the charity's Trustees, consists of the Chair, the Treasurer and up to 15 individual Board members. The Board agrees the policy of the charity and is responsible for its finances and assets, and for employing staff to carry out its work. The Board meets at least four times a year. It appoints a Finance and Staff Sub-Committee, consisting of up to six Trustees to regularly review financial and staff matters. This sub-committee also meets approximately six times a year and reports to the Board.

The Director (CEO) manages the day-to-day affairs of the charity and reports regularly to the Chair and to the Board.

## Recruitment and Appointment of Trustees

Up to nine Trustees are nominated and elected from the Open Age membership at the AGM. Subsequently the Board co-opts up to a further eight Trustees for the year. Co-opted members are individual members or representatives of organisations, who have been nominated and selected for the complementary skills they are able to offer. Trustees are invited to attend an induction session on appointment and are informed of ongoing training opportunities, as they arise both within the organisation and externally.

## Pay Policy for senior staff

Open Age Trustees, the Senior Leadership Team (made up of 4 senior staff plus the CEO) and other senior managers comprise the key management personnel of the charity in charge of directing and controlling, running and operating the charity on a day to day basis. All Trustees give of their time freely and no Trustee received remuneration in the year (2020: £Nil).

Regular reviews of senior staff pay levels take place using a salary benchmarking exercise against comparable organisations. The results of these reviews are approved by the Finance and Staff Sub-Committee; the last such review was November 2018. An annual cost of living increase is also considered by the Finance and Staff Sub-Committee taking into account sector trends, inflationary factors and the charity's financial position.

### **Trustees' Responsibilities**

The trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2019 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charities (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

**The Trustees of the charity confirm that:**

As far as they are aware, there is no relevant audit information of which the charity's auditors are unaware, and they have taken all the steps that they ought to have taken as Trustees in order to make themselves aware of any relevant audit information and to establish that the charity's auditors are aware of that information.

**Public Benefit**

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

**APPROVAL**

This report was approved by the Trustees on 20 December 2021 and signed on their behalf by:

Dean James  
Chair of the Board of Trustees

# Auditor's Report

## Independent Auditor's Report to the Trustees of Open Age

### Opinion

We have audited the financial statements of Open Age (the 'charity') for the year ended 31 March 2021 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cashflows and the notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charity's affairs as at 31 March 2021, and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Charities Act 2011.

### Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

### Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively,



may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

### **Other information**

The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

### **Matters on which we are required to report by exception**

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 require us to report to you if, in our opinion:

- the information given in the financial statements is inconsistent in any material respect with the trustees' report; or
- the charity has not kept adequate and proper accounting records; or
- the financial statements are not in agreement with the accounting records and returns; or
- we have not received all the information and explanations we require for our audit.

### **Responsibilities of trustees**

As explained more fully in the trustees' responsibilities statement, the trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

### **Auditor's responsibilities for the audit of the financial statements**

We have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with the Acts and relevant regulations made or having effect thereunder.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

We gained an understanding of the legal and regulatory framework applicable to the Charity and the sector in which it operates and considered the risk of the Charity not complying with the applicable laws and regulations including fraud in particular those that could have a material impact on the financial statements. This included those regulations directly related to the financial statements, including financial reporting, and tax legislation. In relation to the operations of the Charity this included compliance with the Charities Act 2011 and SORP 2019, GDPR, employment law, safeguarding and health & safety.

The risks were discussed with the audit team and we remained alert to any indications of non-compliance throughout the audit. We carried out specific procedures to address the risks identified.

These included the following:

- Review of legal fees incurred;
- Reviewing minutes of Trustee Board meetings;
- Agreeing the financial statement disclosures to underlying supporting documentation;
- Enquiring of management, including those charged with governance;
- Reviewing the key accounting policies and estimates

To address the risk of management override of controls, we reviewed systems and procedures to identify potential areas of management override risk. In particular, we carried out testing of journal entries and other adjustments for appropriateness, and evaluated the business rationale of significant transactions to identify large or unusual transactions. We also assessed management bias in relation to the accounting policies adopted and in determining significant accounting estimates.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities)

### **Use of our report**

This report is made solely to the charity's trustees, as a body, in accordance with Part 4 of the Charities (Accounts and Reports) Regulations 2008. Our audit work has been undertaken so that we might state to the charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose.

To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

### **Price Bailey LLP**

Chartered Accountants  
Statutory Auditors  
24 Old Bond Street  
London W1S 4AP

22 December 2021

*Price Bailey LLP is eligible to act as an auditor  
in terms of section 1212 of the Companies Act 2006.*

# Statement of Financial Activities

For the year ended 31 March 2021

	Note	Restricted Funds 2021 £	Unrestricted Funds 2021 £	Total Funds 2021 £	Total Funds 2020 £
<b>INCOME</b>					
<i>Income from donations and legacies:</i>					
Core grants	4	211,342	59,922	271,264	249,115
Donations, Legacies & similar income	4	13,572	95,708	109,280	178,462
<i>Investment interest</i>		-	838	838	3,661
<i>Income from Charitable Activities</i>	5				
Learning, Health & Wellbeing		1,019,734	2,087	1,021,821	1,217,790
IT & Digital Inclusion		108,244	-	108,244	75,083
Employment Support		-	104,710	104,710	104,925
<b>TOTAL INCOME</b>		<b>1,352,892</b>	<b>263,265</b>	<b>1,616,157</b>	<b>1,829,036</b>
<b>EXPENDITURE</b>					
Cost of raising funds	9	27,643	5,379	33,022	10,400
<i>Expenditure on charitable activities:</i>	7				
Learning, Health & Wellbeing		1,262,314	12,271	1,274,585	1,511,226
IT & Digital Inclusion		106,984	1,260	108,244	60,595
Employment Support		-	105,002	105,002	105,044
<b>TOTAL EXPENDITURE</b>		<b>1,396,941</b>	<b>123,912</b>	<b>1,520,853</b>	<b>1,687,265</b>
<b>NET (EXPENDITURE) / INCOME</b>	10	<b>(44,049)</b>	<b>139,353</b>	<b>95,304</b>	<b>141,771</b>
<b>NET MOVEMENT IN FUNDS FOR THE YEAR</b>		<b>(44,049)</b>	<b>139,353</b>	<b>95,304</b>	<b>141,771</b>
TOTAL FUNDS AT 1 APRIL 2020		588,575	767,371	1,355,946	1,214,175
<b>TOTAL FUNDS AT 31 MARCH 2021</b>	16	<b>544,526</b>	<b>906,724</b>	<b>1,451,250</b>	<b>1,355,946</b>

The Statement of Financial Activities includes all gains and losses recognised in the year. All income and expenditure has arisen from continuing activities.

The notes on pages 52 to 71 form part of these financial statements.

# Balance Sheet

	Note	£	2021 £	£	2020 £
<b>FIXED ASSETS</b>					
Tangible fixed assets	13		<b>539,526</b>		588,57
<b>CURRENT ASSETS</b>					
Debtors	14	<b>43,516</b>		156,063	
Cash at bank		<b>970,630</b>		764,369	
			<u>1,014,146</u>	<u>920,432</u>	
<b>CREDITORS:</b> amounts falling due within one year	15	<b>(102,422)</b>		<b>(153,061)</b>	
<b>NET CURRENT ASSETS</b>			<b><u>911,724</u></b>		<b><u>767,371</u></b>
<b>NET ASSETS</b>	17		<b><u>1,451,250</u></b>		<b><u>1,355,946</u></b>
<b>CHARITY FUNDS</b>					
Restricted Funds	16		<b>544,526</b>		588,575
Unrestricted Funds:					
Designated	16		<b>105,578</b>		69,837
General	16		<b><u>801,146</u></b>		<b><u>697,534</u></b>
<b>TOTAL FUNDS</b>			<b><u>1,451,250</u></b>		<b><u>1,355,946</u></b>

The financial statements were approved by the Trustees on 20 December 2021 and signed of their behalf by:

Dean James  
Chair

Stephen Souchon  
Treasurer

The notes on pages 52 to 71 form part of these financial statements.



# Statement of Cash Flows

	2021 £	2020 £
<b>Cash flows from operating activities:</b>		
Net movement of funds in the year	95,304	141,771
Interest received	(838)	(3,661)
Depreciation	49,049	49,049
Decrease / (increase) in debtors	112,547	(36,985)
(Decrease) in creditors	(50,639)	(136,109)
Net cash provided by operating activities	<u>205,423</u>	<u>14,065</u>
<b>Cash flows from investing activities:</b>		
Interest income	838	3,661
Net cash provided by investing activities	<u>838</u>	<u>3,661</u>
Increase in cash and cash equivalents in the year	206,261	17,726
Cash and cash equivalents at the beginning of the year	764,369	746,643
Cash and cash equivalents at the end of the year	<u><u>970,630</u></u>	<u><u>764,369</u></u>
<b>Analysis of changes in net debt:</b>		
Cash and cash equivalents as at 1 April 2020	764,369	746,643
Cash flows	206,261	17,726
Cash and cash equivalents as 31 March 2021	<u><u>970,630</u></u>	<u><u>764,369</u></u>

The notes on pages 52 to 71 form part of these financial statements.

# Notes forming part of the financial statements

## Accounting Policies

### 1.1 Basis of Preparation of Financial Statements

The financial statements have been prepared in accordance with 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) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

Open Age meets the definition of a public benefit entity under FRS 102.

Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note(s).

The financial statements are presented in Sterling and rounded to the nearest £.

The financial statements have been prepared to give a 'true and fair view' and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 14 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

### 1.2 Going concern

The financial statements have been prepared on a going concern basis which forecasts that the charity will have adequate resources to continue in operational existence for a period of at least 12 months from the date of this financial report.

A forecast have been prepared for a period of more than 12 months from the date of approval of these financial statements. The forecasts indicates that, whilst taking into account reasonable downsides, sufficient funds are expected to be generated within the charity so as to meet liabilities as they fall due.

A significant part of Open Age's income comes from grants and contracts from our local authority partners. As in previous years, grants and contracts for the next financial year have not yet been signed, meaning there is some risk to this income. Management and trustees rate this risk as low given that discussions are ongoing with our commissioners and for many years these income streams have been renewed year on year. Furthermore, a significant proportion of these have now passed the first stage of the finance approval process at local authority level. Expenditure of these grants and contracts are not committed until they have been approved. If any of this income was cut the charity would take immediate action to mitigate any such risk by reducing expenditure in order to maintain its going concern status. Management and trustees regularly review such risks on an ongoing basis.

As part of their review the Board of trustees have additionally considered the implications of the current Coronavirus Pandemic on the going concern assumption. The economic impact on the charity due to the Coronavirus Pandemic is subject to unprecedented levels of uncertainty with the full range of possible effects unknown. Sensitivity analyses have been applied to the

forecasts to assess a range of possible impacts from the Coronavirus Pandemic. In the analyses, a variety of assumptions were modelled with varying degrees of impact and duration. Whilst there is evidence of negative effects on income and cash flows, the resulting sensitised forecasts continue to support the going concern assumption and the Board of trustees are confident they can take sufficient mitigating action to ensure that available funds will be sufficient for the charity's needs.

### 1.3 Fund Accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds are funds which have set aside for specific purposes by the charity.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

### 1.4 Income

All income is included in the Statement of Financial Activities when the charity is legally entitled to the income, any performance conditions attached to the item(s) of the income have been met, their receipt is considered probable and the amount can be quantified with reasonable accuracy and is not deferred.

Income from government and other grants, whether 'capital' grants or 'revenue' grants are recognised when the charity has entitlement to the funds, any performance conditions attached to the grants have been met, it is probable that the income will be received and the amount can be measured reliably and is not deferred.

Investment income is recognised on a receivable basis.

Donations and gifts are accounted for on a received basis. No amounts are included in the financial statements for services donated by volunteers.

Legacies are included in the statement of financial activities when payment is either received or notified as receivable and there is sufficient evidence that receipt is probable. Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably and payment is notified as receivable. Where legacies have been notified to the charity and criteria for income recognition have not been met, then the legacy is recognised and deferred until the criteria has been met.

### 1.5 Expenditure

All expenditure is accounted for on an accruals basis and has been included under expense categories that aggregate all costs for allocation to activities. Where staff are wholly engaged on direct charitable or other work their salaries and associated costs are allocated directly to the appropriate activity. Salaries and associated costs incurred in respect of support work are allocated to the different funds and activities on a basis of estimates prepared by the staff.

Fund raising costs are those incurred in seeking donations, legacies, non-performance related grants and other voluntary contributions.

Costs associated with delivering or supporting the provision of services including the costs of negotiating the terms of a contract or performance related grants relating to the provision of service and costs associated with disseminating information in support of charitable activities are regarded as part of expenditure on charitable activities.

Charitable activities include expenditure associated with the provision of Learning, Physical, Health and Wellbeing related activities, IT and Digital training, Support for Carers, Employment Support including information and Guidance and Job Brokerage and include both the direct costs and support costs relating to these activities.

Support costs are those associated with functions and activities that assist the work of the charity.

Support costs include Finance, Payroll, IT, Personnel, Administration, Communication, Office running costs, membership services and Governance costs. These are allocated between costs of raising funds and expenditure on charitable activities.

Governance costs are those incurred in connection with enabling the charity to comply with external regulation, constitution and statutory requirements and in providing support to the trustees in discharge of their statutory duties.

## 1.6 VAT

The charity is not registered for VAT. In common with many other similar charities, Open Age expenses are inflated by VAT, which cannot be recovered.

## 1.7 Tangible Fixed Assets and Depreciation

All assets costing more than £3,000 with estimated useful life of at least 3 years are capitalised.

Tangible fixed assets are stated at cost less depreciation. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value, over their expected useful lives on the following bases: No depreciation is provided on assets which have not yet been brought into use.

New Horizons Building	-	Over 25 years
Fixtures & Fittings	-	Over 5 years
Office Equipment	-	Over 5 years
Computer Equipment	-	Over 3 years

## 1.8 Operating Leases

Operating leases are recognised over the period of which the lease falls due. Benefits received and receivable as an incentive to sign an operating lease are recognised on a straight line basis over the period of the lease.

## 1.9 Pensions

The charity is a member of a multi-employer pension scheme administered by the Pensions Trust.

The charity had been advised that the Growth Plan Series 3, to which it has previously contributed, is a defined benefit scheme under the revised definitions contained in the Pensions Act 2011. Contributions are no longer made to the Growth Plan Series 3; however, this scheme

is in deficit.

Employees are now members of the Growth Plan Series 4. This scheme is a defined contribution pension scheme. Since February 2016, new and existing employees who are not in the Scheme were automatically enrolled into the scheme membership unless they have exercised their right to opt out.

Refer to note 12 for further information on the actuarial valuation of the Scheme, and the estimated costs to the Charity of withdrawing from the Scheme. The pension charge represents the amounts payable by the charity to the fund in respect of this year.

### **1.10 Debtors**

Trade and other debtors are recognised at the settlement amount due after any trade discount offered.

Prepayments are valued at the amount prepaid net of any trade discounts due.

### **1.11 Cash at bank and in hand**

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

### **1.12 Creditors and provisions**

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

### **1.13 Financial instruments**

The charity only has financial assets and financial liabilities that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value. Fixed assets are recorded at depreciated historical cost. All other assets and liabilities are recorded at cost

## **2. Legal status of the charity**

The charity is registered as a Charitable Incorporated Organisation (CIO) with the Charity Commission. The charity is registered in England and its registered address is St Charles Centre for Health and Wellbeing, Exmoor Street, London, W10 6DZ.

## **3. Judgements and key sources of estimation uncertainty**

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors including expectations of future events that



are believed to be reasonable under the circumstances. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

No significant judgements, accounting policies or assumptions have been made by management in applying the charity's accounting policies (2020: none).

**4. CORE GRANTS, LEGACIES, DONATIONS AND SIMILAR INCOME:**

	Restricted Fund 2021 £	Unrestricted Fund 2021 £	Total Fund 2021 £	Restricted Fund 2020 £	Unrestricted Fund 2020 £	Total Fund 2020 £
<b>Core revenue grants from:</b>						
RBKC	10,200	-	10,200	10,000	-	10,000
West London CCG	102,000	-	102,000	170,000	-	170,000
National Lottery Community Fund	9,125	-	9,125	-	-	-
Westminster Council (Covid Grants)	-	42,222	42,222	-	-	-
Trusts and Foundations	90,017	17,700	107,717	25,000	44,115	69,115
<b>Sub Total</b>	<b>211,342</b>	<b>59,922</b>	<b>271,264</b>	<b>205,000</b>	<b>44,115</b>	<b>249,115</b>
Donations from individuals, Trusts, Foundations & Corporate bodies	7,600	85,705	93,305	20,160	87,416	107,576
Legacies	5,972	10,003	15,975	35,000	35,886	70,886
<b>Sub Total</b>	<b>13,572</b>	<b>95,708</b>	<b>109,280</b>	<b>55,160</b>	<b>123,302</b>	<b>178,462</b>
<b>Total</b>	<b>224,914</b>	<b>155,630</b>	<b>380,544</b>	<b>260,160</b>	<b>167,417</b>	<b>427,577</b>

Restricted Trusts and Foundations income are shown in more detail in note 16 under Restricted Funds.

Other Trusts and Foundations income within unrestricted funds are £17,700 (2020: £44,115).

**2021**

£

The Florence Cohen Charitable Trust	10,000
Edward Gostling Foundation	2,500
Charities Trust (donations)	5,200

**2020**

Expat Foundation Trust	25,000
Centre for Aging	5,000
Charities Trust (donations)	150
Sobel Foundation	5,000
Imperial College Science Seed Fund	1,965
GSK Impact Fund	3,000
London Freemasons Charity	3,000
The Katherine Lawrence Trust	1,000

**5. INCOME FROM CHARITABLE ACTIVITIES:**

	Restricted Fund 2021 £	Unrestricted Fund 2021 £	Total Fund 2021 £	Restricted Fund 2020 £	Unrestricted Fund 2020 £	Total Fund 2020 £
<b>Learning, Health &amp; Wellbeing:</b>						
RBKC Adult Community Learning	80,470	-	80,470	106,500	-	106,500
RBKC North Prevention contract	166,448	-	166,448	166,448	-	166,448
RBKC South Prevention contract	206,270	-	206,270	182,845	-	182,845
Kensington & Chelsea Social Council	39,125	-	39,125	39,311	-	39,311
WCC Prevention Contract	156,051	-	156,051	165,244	-	165,244
Westminster City Council	51,215	-	51,215	51,213	-	51,213
L B Hammersmith & Fulham Tri-Borough CCG	38,000	-	38,000	38,000	-	38,000
Public Health (RBKC & WCC)	138,000	-	138,000	138,000	-	138,000
CLCH NHS Trust Brent Falls Prevention	81,875	-	81,875	89,770	-	89,770
	15,036	-	15,036	15,000	-	15,000
Trusts, Foundations, & Corporates	44,968	-	44,968	115,097	24,788	139,885
Fees from classes and events	-	-	-	-	84,237	84,237
Other income	2,276	2,087	4,363	500	837	1,337
<b>Sub Total</b>	<b>1,019,734</b>	<b>2,087</b>	<b>1,021,821</b>	<b>1,107,928</b>	<b>109,862</b>	<b>1,217,790</b>
<b>IT &amp; Digital Inclusion:</b>						
RBKC Adult Community Learning	52,934	-	52,934	70,800	-	70,800
Greater London Authority	55,310	-	55,310	-	-	-
Fees from classes and events	-	-	-	-	4,283	4,283
<b>Sub Total</b>	<b>108,244</b>	<b>-</b>	<b>108,244</b>	<b>70,800</b>	<b>4,283</b>	<b>75,083</b>
<b>Employment Support:</b>						
DWP/ESP/REED/Job Centre Plus	-	104,710	104,710	-	104,925	104,925
<b>Sub Total</b>	<b>-</b>	<b>104,710</b>	<b>104,710</b>	<b>-</b>	<b>104,925</b>	<b>104,925</b>
<b>Total</b>	<b>1,127,978</b>	<b>106,797</b>	<b>1,234,775</b>	<b>1,178,728</b>	<b>219,070</b>	<b>1,397,798</b>

**6. GOVERNMENT GRANTS:**

Income from government grants comprises performance related and general grants made by various government bodies to enable the charity to deliver its charitable objectives.

There were no unfulfilled conditions or special criteria attaching to the grants that have been recognised in income.

Total government grant income amounted to £1,192,734 (2020: £1,280,530).

**7. EXPENDITURE ON CHARITABLE ACTIVITIES:**

	Restricted Fund 2021 £	Unrestricted Fund 2021 £	Total Fund 2021 £	Restricted Fund 2020 £	Unrestricted Fund 2020 £	Total Fund 2020 £
<b>Learning, Health &amp; Wellbeing:</b>						
Direct costs:						
Staff costs	721,730	3,627	725,357	755,201	4,747	759,948
Tutor fees	75,564	-	75,564	171,599	14,877	186,476
Premises	51,615	-	51,615	95,613	6,088	101,701
Other direct costs	67,914	1,287	69,201	103,017	7,876	110,893
Support costs (note 8)	301,303	7,357	308,660	323,087	727	323,814
Governance costs (note 8)	44,188	-	44,188	28,394	-	28,394
<b>Sub Total</b>	<b>1,262,314</b>	<b>12,271</b>	<b>1,274,585</b>	<b>1,476,911</b>	<b>34,315</b>	<b>1,511,226</b>
<b>IT &amp; Digital Inclusion:</b>						
Direct costs:						
Staff costs	23,938	1,260	25,198	8,640	2,529	11,169
Tutor fees	12,539	-	12,539	24,468	6,521	30,989
Premises	2,758	-	2,758	4,951	-	4,951
Other direct costs	985	-	985	981	597	1,578
Support costs (note 8)	66,764	-	66,764	9,212	2,696	11,908
<b>Sub Total</b>	<b>106,984</b>	<b>1,260</b>	<b>108,244</b>	<b>48,252</b>	<b>12,343</b>	<b>60,595</b>
<b>Employment Support</b>						
Direct Costs:						
Staff costs	-	86,147	86,147	-	80,541	80,541
Tutor Fees	-	-	-	-	274	274
Premises	-	7,678	7,678	1,229	2,633	3,862
Other direct costs	-	11,177	11,177	-	-	-
Support costs (note 8)	-	-	-	20,367	-	20,367
<b>Sub Total</b>	<b>-</b>	<b>105,002</b>	<b>105,002</b>	<b>21,596</b>	<b>83,448</b>	<b>105,044</b>
<b>Total</b>	<b>1,369,298</b>	<b>118,533</b>	<b>1,487,831</b>	<b>1,546,759</b>	<b>130,106</b>	<b>1,676,865</b>

## 8. ANALYSIS OF SUPPORT AND GOVERNANCE COSTS

The charity initially identifies the costs of its support functions. It then identifies those costs which relate to the governance function. Having identified its governance costs, these along with the remaining support costs, are directly allocated to the various funds attributed to the charitable activities undertaken in the year.

Audit fees include prior year overrun costs agreed post audit and accounted for in 2021.

	2021	2020
	£	£
<b>Support Costs</b>		
Staff costs	185,781	166,205
Premises costs	6,140	11,921
Communication	54,305	9,968
Equipment	90,766	70,713
Recruitment, training and travel	4,521	27,994
Consultancy fees	33,911	69,275
Other overheads	-	13
	<hr/>	<hr/>
<b>Sub Total</b>	<b>375,424</b>	<b>356,089</b>
	<hr/>	<hr/>
<b>Governance Costs</b>		
Staff support costs	30,448	21,494
Audit fees	13,740	6,900
AGM and other business meeting expenses	-	-
	<hr/>	<hr/>
<b>Sub Total</b>	<b>44,188</b>	<b>28,394</b>
	<hr/>	<hr/>
<b>Total</b>	<b><u>419,612</u></b>	<b><u>384,483</u></b>



**9. COST OF RAISING FUNDS**

	Restricted Funds 2021	Unrestricted Funds 2021	Total Funds 2021	Total Funds 2020
	£	£	£	£
Staff costs	21,996	4,280	26,276	9,733
Other fundraising costs	5,647	1,099	6,746	667
<b>Total</b>	<u>27,643</u>	<u>5,379</u>	<u>33,022</u>	<u>10,400</u>

Cost of raising funds was £33,022 (2020: £10,400). In 2021 this was split between restricted and unrestricted fundraising, whereas in 2020 it was allocated as unrestricted.

**10. NET INCOME**

	2021	2020
	£	£
This is stated after charging:		
Depreciation of tangible fixed assets	49,049	49,049
Auditors' remuneration - audit services	13,740	6,900
Pension costs	25,704	26,527
Operating lease payments	1,774	4,066
	<u>90,267</u>	<u>86,542</u>

During the year, no Trustees received any remuneration or reimbursed expenses (2020 - £Nil).

**11. STAFF AND TUTOR COSTS**

Staff costs were as follows:

	2021	2020
	£	£
Wages and salaries	969,228	942,192
Social security costs	84,275	80,989
Pension costs	25,704	26,527
<b>Sub Total</b>	<u>1,079,207</u>	<u>1,049,708</u>
Sessional Tutors	88,103	217,739
	<u>1,167,310</u>	<u>1,267,447</u>

1 employee received remuneration between £60,000 and £70,000 (2020: 1 employee between £60,000 and £70,000).

Sessional tutors are self-employed and invoice the charity for their time.

During the year, no trustees received any benefits neither were they reimbursed expenses (2020: £Nil).

The key management personnel of the charity comprise the Trustees, the Director and 4 Heads of Department, who make up the Senior Leadership Team, and 5 other senior service managers (2020: 8), whose employee benefits totalled £472,597 (2020: £433,158).

The average monthly head count of staff employed during the year was as follows:

	<b>2021</b>	<i>2020</i>
	<b>No.</b>	<i>No.</i>
Director	<b>1</b>	<i>1</i>
Heads of Department	<b>4</b>	<i>4</i>
Service Managers & Co-ordinators	<b>26</b>	<i>28</i>
Support Services (Finance/Admin/Fundraising)	<b>6</b>	<i>4</i>
	<b><u>37</u></b>	<i><u>37</u></i>

## 12. PENSIONS

The charity is a member of a multi-employer pension scheme administered by the Pensions Trust.

The charity had been advised that the Growth Plan Series 3, to which it has previously contributed, is a defined benefit scheme under the revised definitions contained in the Pensions Act 2011.

Contributions are no longer made to the Growth Plan Series 3. Actuarial valuation of the Scheme on 30 September 2020 show that the scheme is £140.7 Million in deficit. The Pensions Trust have advised that it is not possible to identify Open Age's share of the underlying assets and liabilities of the scheme. They have advised that provided Open Age continues to be a member of the Pensions Trust, Open Age will not be required to contribute to the deficit. There are no contributions being made by Open Age towards the deficit as it continue to maintain its membership of the Scheme. Estimated cost of withdrawal for Open Age was calculated to be £22,708 as at 30 September 2020.

Employees are now members of the Growth Plan Series 4. This scheme is a defined contribution pension scheme and contributions are charged in the statement of financial activities. The charge for the year for the Charity for pensions is £25,704 (2020: £26,527) including DC Life Assurance for all employees under the Pension Trust Scheme of £1,280 (2020: £975). The amount outstanding in respect of The Pensions Trust at 31 March 2021 was £206 (2020: £5,968).

**13. TANGIBLE FIXED ASSETS**

	New Horizons Building	Computer Equipment	Furniture, Fittings and Equipment	Total
	£	£	£	£
<b>Cost</b>				
At 1 April 2020	1,226,212	81,295	108,616	1,416,123
Additions	-	-	-	-
	<u>1,226,212</u>	<u>81,295</u>	<u>108,616</u>	<u>1,416,123</u>
At 31 March 2021	<u>1,226,212</u>	<u>81,295</u>	<u>108,616</u>	<u>1,416,123</u>
<b>Depreciation</b>				
At 1 April 2020	637,637	81,295	108,616	827,548
Charge for the year	49,049	-	-	49,049
	<u>686,686</u>	<u>81,295</u>	<u>108,616</u>	<u>876,597</u>
At 31 March 2021	<u>686,686</u>	<u>81,295</u>	<u>108,616</u>	<u>876,597</u>
<b>Net book value</b>				
At 31 March 2021	<u>539,526</u>	<u>-</u>	<u>-</u>	<u>539,526</u>
At 31 March 2020	<u>588,575</u>	<u>-</u>	<u>-</u>	<u>588,575</u>

**14. DEBTORS**

	2021	2020
	£	£
Due within one year		
Grant receivable	18,749	62,808
Accrued income	8,239	79,471
Prepayments	16,031	13,784
Sundry debtors	497	-
	<u>43,516</u>	<u>156,063</u>

**15. CREDITORS - Amounts falling due within one year**

	2021	2020
	£	£
Trade Creditors	49,107	81,893
Accruals	5,064	31,132
Deferred Income (note 15a)	48,045	12,017
Social Security & other taxes & pension contributions	206	28,019
Other creditors	-	-
	<u>102,422</u>	<u>153,061</u>

**15A. DEFERRED INCOME**

	<b>2021</b>	<i>2020</i>
	<b>£</b>	<b>£</b>
Deferred income 1 April	<b>12,017</b>	<i>51,661</i>
Amount released to income earned from charitable activities	<b>(5,972)</b>	<i>(51,661)</i>
Amount deferred in year	<b>42,000</b>	<i>12,017</i>
	<hr/>	<hr/>
Deferred income 31 March	<b><u>48,045</u></b>	<i><u>12,017</u></i>

Income is deferred when received in the financial period but has not been earned by the end of the year.

## 16. STATEMENT OF FUNDS

	1Apr 2020	Income	Expenditure	Transfers in/(out)	31 Mar 2021
Unrestricted Funds	£	£	£	£	£
<b>2021</b>					
<b>Designated Funds:</b>					
<b>Open Age Hubs Activities (Churchill Garden, Queens Park Harrow Road and Westbourne Park)</b>	1,790	-	-	(1,790)	-
<b>New Horizons CRM System</b>	68,047	-	-	(42,469) 80,000	25,578 80,000
	<u>69,837</u>	<u>-</u>	<u>-</u>	<u>35,741</u>	<u>105,578</u>
<b>General Funds</b>	697,534	263,265	(123,912)	(35,741)	801,146
<b>TOTAL UNRESTRICTED FUNDS</b>	<u>767,371</u>	<u>263,265</u>	<u>(123,912)</u>	<u>-</u>	<u>906,724</u>
	1Apr 2019	Income	Expenditure	31 Mar 2020	31 Mar 2020
Unrestricted Funds	£	£	£	£	£
<b>2020</b>					
<b>Open Age Hubs Activities (Churchill Garden, Queens Park Harrow Road and Westbourne Park)</b>	1,790	-	-	-	1,790
<b>New Horizons</b>	68,047	-	-	-	68,047
	<u>69,837</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>69,837</u>
<b>General Funds</b>	447,892	390,148	(140,506)	-	697,534
<b>TOTAL UNRESTRICTED FUNDS</b>	<u>517,729</u>	<u>390,148</u>	<u>(140,506)</u>	<u>-</u>	<u>767,371</u>

Funds available at 31 March 2021 are sufficient to permit the charity to continue in operation in the short term given the continued support of the funders. Should this support not continue in the longer term, further financial support would need to be sought to replace it. Designated funds at 31 March 2021 represent unrestricted funds set aside towards planned and unplanned premises maintenance and infrastructure support costs for New Horizons; and £80,000 towards the development costs of our new CRM booking system.



<b>RESTRICTED FUNDS – 2021</b>	<b>01-Apr 2020</b>	<b>Income</b>	<b>Expenditure</b>	<b>31 Mar 2021</b>
	<b>£</b>	<b>£</b>	<b>£</b>	
RBKC Adult Community Learning (ACL)	-	133,404	(133,404)	-
RBKC North Prevention contract	-	166,448	(166,448)	-
RBKC South Prevention contract	-	206,270	(206,270)	-
RBKC Public Health (Time For Me Carers Programme)	-	46,052	(46,052)	-
RBKC Corporate Services	-	10,200	(10,200)	-
RBKC - Activate Project	-	2,323	(2,323)	-
Tri- Borough CCG (Steady & Stable)	-	138,000	(138,000)	-
Westminster City Council (Prevention contract)	-	156,051	(156,051)	-
Central London CCG (Carers)	-	22,980	(22,980)	-
West London CCG (Tier 1)	-	102,000	(102,000)	-
Central London Community Health (Fall Prevention)	-	15,036	(15,036)	-
L B of Hammersmith and Fulham (Fast Track Grant)	-	38,000	(38,000)	-
Public Health Westminster	-	33,500	(33,500)	-
Westminster City Council & CCG (Bone Health)	-	20,000	(20,000)	-
West London CCG (Self Care Programme / KCSC)	-	39,125	(39,125)	-
Westminster City Council (Telephone Club)	-	8,235	(8,235)	-
Everyone Active	-	2,276	(2,276)	-
National Community Lottery Fund (improving Safety)	-	9,125	(9,125)	-
The Kensington and Chelsea Foundation (Men's Space)	-	15,332	(15,332)	-
The Kensington and Chelsea Foundation (Covid Grant)	-	21,759	(21,759)	-
City Bridge Trust (Covid Grant)	-	21,758	(21,758)	-
Hyde Park Place Estate Charity	-	5,000	(5,000)	-
Westminster Amalgamated Charities	-	5,000	(5,000)	-
Pimlico Million (Quaker Social)	-	1,500	(1,500)	-
The Austin Hope Pilkington Trust	-	5,000	(5,000)	-
Westminster Council Community Contribution Scheme	-	10,000	(5,000)	5,000
Legacy (towards rent at The Avenues)	-	5,972	(5,972)	-
Second Half Foundation (SHC activity)	-	20,000	(20,000)	-
Mercers Charitable Foundation	-	24,788	(24,788)	-
Donations (restricted)	-	7,600	(7,600)	-
London Sport (Covid grant)	-	4,848	(4,848)	-
Greater London Authority	-	55,310	(55,310)	-
<b>Sub total</b>	<b>-</b>	<b>1,352,892</b>	<b>(1,347,892)</b>	<b>5,000</b>
New Horizons Building Development Fund	<b>588,575</b>	-	<b>(49,049)</b>	<b>539,526</b>
<b>Total Restricted Funds</b>	<b>588,575</b>	<b>1,352,892</b>	<b>(1,396,941)</b>	<b>544,526</b>
<b>Total Unrestricted Funds</b>	<b>767,371</b>	<b>263,265</b>	<b>(123,912)</b>	<b>906,724</b>
<b>TOTAL FUNDS 2021</b>	<b><u>1,355,946</u></b>	<b><u>1,616,157</u></b>	<b><u>(1,520,853)</u></b>	<b><u>1,451,250</u></b>

<b>RESTRICTED FUNDS – 2020</b>	<b>01-Apr 2019</b>	<b>Income</b>	<b>Expenditure</b>	<b>31 Mar 2020</b>
	<b>£</b>	<b>£</b>	<b>£</b>	
RBKC ACL (Adult Education)	-	177,300	(177,300)	-
RBKC (North Hub Contract)	-	166,448	(166,448)	-
RBKC (South Hub Contract)	58,822	182,844	(241,666)	-
RBKC Public Health (Time For Me Carers Programme)	-	46,315	(46,315)	-
RBKC (Corporate Services)	-	10,000	(10,000)	-
RBKC - Silver Sunday	-	5,000	(5,000)	-
RBKC - Activate Project	-	3,344	(3,344)	-
Tri- Borough CCG (Steady & Stable)	-	138,000	(138,000)	-
Westminster Council (Older People Hub Contract)	-	204,555	(204,555)	-
Central London CCG (Carers)	-	22,978	(22,978)	-
West London CCG (Tier 1)	-	170,000	(170,000)	-
Brent (Fall Prevention)	-	15,000	(15,000)	-
L B of Hammersmith and Fulham (Linked-In and Active)	-	38,000	(38,000)	-
Public Health Westminster	-	33,500	(33,500)	-
WCC & CCG (Bone Health)	-	20,000	(20,000)	-
West London CCG (Self Care Programme / KCSC)	-	39,311	(39,311)	-
Westminster CC (Telephone Club)	-	8,235	(8,235)	-
Westminster Almshouse Foundation	-	10,000	(10,000)	-
The Kensington and Chelsea Foundation (Men's Space)	-	15,950	(15,950)	-
Goundworks/TFL (Cycling & walking grants London)	-	10,816	(10,816)	-
Westminster Active (Over 50 Circuit)	-	500	(500)	-
Thrive Tribe	-	1,060	(1,060)	-
Queens Park Community Council	-	4,550	(4,550)	-
Queens Park Hub (cost recovery)	-	2,688	(2,688)	-
Regent Street Cinema Ballroom (Carers)	-	3,900	(3,900)	-
Wolfson Foundation	-	25,000	(25,000)	-
The Grove Trust	-	23,500	(23,500)	-
Legacy (towards rent at The Avenues)	-	35,000	(35,000)	-
Second Half Foundation (SHC activity)	-	20,000	(20,000)	-
Westbourne Activities	-	160	(160)	-
Thames Bank	-	1,500	(1,500)	-
London Sport	-	1,110	(1,110)	-
Westway Trust	-	2,324	(2,324)	-
<b>Sub total</b>	<b><u>58,822</u></b>	<b><u>1,438,888</u></b>	<b><u>(1,497,710)</u></b>	<b><u>-</u></b>
New Horizons Building Development Fund	<b>637,624</b>	-	<b><u>(49,049)</u></b>	<b>588,575</b>
<b>Total Restricted Funds</b>	<b><u>696,446</u></b>	<b><u>1,438,888</u></b>	<b><u>(1,546,759)</u></b>	<b><u>588,575</u></b>
<b>Total Unrestricted Funds</b>	<b>517,729</b>	<b>390,148</b>	<b>(140,506)</b>	<b>767,371</b>
<b>TOTAL FUNDS 2020</b>	<b><u>1,214,175</u></b>	<b><u>1,829,036</u></b>	<b><u>(1,687,265)</u></b>	<b><u>1,355,946</u></b>

Grants, which are received for specific projects, are accounted for as restricted funds. The balances on restricted funds as at 31 March 2021 arise from grants received for specific projects on which some expenditure is still to be incurred in the coming financial year.

Each of the projects is described in more detail below.

## **COMMUNITY ACTIVITIES**

### **Second Half Centre (North Kensington)**

Second Half Centre provides a weekly programme of learning, physical, health and creative and performing arts related activities in the north of RBKC. It is funded by a variety of grants including West London CCG, the RBKC contracts, RBKC Adult Community Learning (ACL) and the Second Half Foundation.

### **New Horizons Centre (Chelsea)**

The New Horizons Centre provides a weekly programme of learning, physical, health and creative performing arts and related activities in the south of RBKC. It is funded by a variety of grants including West London CCG, RBKC contracts and RBKC Adult Community Learning (ACL).

### **Time For Me (Kensington and Chelsea, and Westminster)**

Projects providing activities and trips out for older carers across Kensington and Chelsea and Westminster, funded through Westminster City Council, Central London CCG and RBKC.

### **New Futures 50 Plus Employment Programme (Westminster, Hammersmith and Fulham and Kensington and Chelsea)**

A programme supporting people over 50 into employment or work-related training and placements under contract with Reed and the DWP.

### **Link Up Project (Kensington and Chelsea)**

A project supporting individuals on a one to one basis to take up activities for those older people who for whatever reason face barriers to attending. Funded through Public Health and Bi-Borough (RBKC and Westminster) Adult Social Care.

### **The Avenues & St. Margaret's (Westminster)**

Funding from Westminster City Council and West London CCG, and Westminster Foundation provided infrastructure support for the services.

### **Steady and Stable (Kensington and Chelsea, Westminster and Hammersmith and Fulham)**

Starting in March 2012 this project in partnership with the Falls service provides sessions to support older people who are unsteady on their feet as well as training for staff working in older people's services funded by West London, Central London and Hammersmith and Fulham CCGS.

A weekly programme of men's activities funded through the Kensington & Chelsea Foundation, and The Grove Trust.

**Linked-In and Active (Hammersmith and Fulham)**

A programme to link older people on a one to one basis into activity as well as provision of activities funded by the London Borough of Hammersmith and Fulham.

**Brent Falls Prevention**

A project in Brent to deliver strength and balances classes to prevent falls, funded by Central London Community Health.

2021	1 April 2020 £	Income £	Expenditure £	Transfers in/(out) £	31 March 2021 £
General Funds	697,534	263,265	(123,912)	(35,741)	801,146
Designated Funds	69,837	-	-	35,741	105,578
Restricted Funds	588,575	1,352,892	(1,396,941)	-	544,526
<b>Total of Funds</b>	<b><u>1,355,946</u></b>	<b><u>1,616,157</u></b>	<b><u>(1,520,853)</u></b>	<b><u>-</u></b>	<b><u>1,451,250</u></b>

## SUMMARY OF FUNDS

2020	1 April 2019 £	Income £	Expenditure £	Transfers in/(out) £	31 March 2020 £
General Funds	447,892	390,148	(140,506)	-	697,534
Designated Funds	69,837	-	-	-	69,837
Restricted Funds	696,446	1,438,888	(1,546,759)	-	588,575
<b>Total of Funds</b>	<b><u>1,214,175</u></b>	<b><u>1,829,036</u></b>	<b><u>(1,687,265)</u></b>	<b><u>-</u></b>	<b><u>1,355,946</u></b>

## 17. ANALYSIS OF NET ASSETS BETWEEN FUNDS

2021	Restricted Funds 2021 £	Unrestricted Funds 2021 £	Total Funds 2021 £
Tangible fixed assets	539,526	-	539,526
Current assets	107,422	906,724	1,014,146
Creditors due within one year	<u>(102,422)</u>	<u>-</u>	<u>(102,422)</u>
<b>Total</b>	<b><u>544,526</u></b>	<b><u>906,724</u></b>	<b><u>1,451,250</u></b>

2020	Restricted Funds 2020 £	Unrestricted Funds 2020 £	Total Funds 2020 £
Tangible fixed assets	588,575	-	588,575
Current assets	153,061	767,371	920,432
Creditors due within one year	<u>(153,061)</u>	<u>-</u>	<u>(153,061)</u>
<b>Total</b>	<b><u>588,575</u></b>	<b><u>767,371</u></b>	<b><u>1,355,946</u></b>

At 31 March 2021 the charity had annual commitments for premises and photo copiers under operating leases as follows:

	2021 £	2020 £
<b>Land and Buildings:</b>		
Expiry date:		
Within one year	-	2,292
Between 2 and 5 years	-	-
<b>Equipment:</b>		
Expiry date:		
Within one year	1,774	1,774
Between 2 and 5 years	4,434	6,208
	<u>6,208</u>	<u>10,274</u>

The leases for the premises all have termination clauses which allow the trustees to terminate the leases within 3-month notice should the need arise. The photo copiers are under non-cancellable operating lease.

## 19. RELATED PARTIES

Our CEO, Iain Cassidy sits on the Management Committee of Westway Community Transport, a Registered Society.

Westway Community Transport provides transport services to the charity. The value of transport services provided to the charity during the year totalled £145 (2020: £2,926). Of this amount £Nil (2020: £56) was owed by the charity to Westway Community Transport.

A £3,000 donation was made from the Marcia Blakenham's Charity Trust (2020: £6,000). There are no further party related transactions.





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