

ANNUAL REPORT  
2020

for

AGE CONCERN APPLEBY

Charity No 517868

Trustees

Chair:	Mrs M Taylor
Vice Chair	Mr D Sampson
Secretary	Mrs L Ronan
Treasurer	Mrs J Robinson
	Mrs S Bradley
	Mrs P Kelly
	Mrs Y May
	Mrs C Robertson
	Mrs J Sampson
	Mrs P Shieldhouse
Auditor	Mr A Little FCA

## **Chairperson's Report on behalf of Trustees**

At last we have been able to hold our AGM in person following further lockdowns at various times during the past sixteen months. During 2020 we, like many others, were affected by the constrictions put upon us by the Covid-19 pandemic

However due to the amazing resilience shown by all our volunteers I am pleased to report that we have continued to be able to successfully support financially numerous local groups and charities. This has been so, not just through our own efforts, but also to the various Covid grants that we have received during the year. Most importantly we have to recognise the sterling work done by our two shop managers, Sue Bradley and Janet Martin together with all the other volunteers.

During the year we have experienced outdoor Trustee meetings, thanks to Jean Robinson allowing us to make use of her garden. This has at least made it possible to discuss matters in person and not to be dependant on Zoom. Also many thanks to Jean for the many years of service she has given as Treasurer.

I would particularly like to thank our Secretary Linda for the magnificent way that she has ensured the efficient running of the Charity. It has not been an easy task and she deserves an enormous amount of credit.

Pam Kelly resigned as a Trustee after an amazing number of years of service to our Charity and we extend our thanks for all that she has done and wish her well.

As for the future, who knows how things will develop? I am certain that as a Group we will all do our very best to ensure the continued success of Age Concern Appleby. Always remember that we are a totally voluntary run Charity and that we can be very proud of what has been achieved.

Margaret Taylor  
Chair  
September 2021

## **Treasurer's Report**

The accounts show that Covid-19 grants received have enabled us to maintain donations comparable to those given last year. Naturally during lockdown our shops were unable to open and this obviously impacted on our shop sales. The remaining balance from the legacy that was received during 2018 has been split equally between Eden Valley Hospice, GNAAS and Hospice at Home as was requested.

Thanks to all our volunteers who have continued to offer their services during this very difficult time.

I would like to thank Anthony Little who has audited our accounts for a number of years at no cost to the Charity. However, due to poor health he regrets that he will be unable to act as our auditor in the future

Jean Robinson  
Treasurer  
September 2021

# Age Concern Appleby

## Income and Expenditure 2020

	2020	2019		2020	2019
<b>EXPENDITURE</b>			<b>INCOME</b>		
<u>CHARITABLE GIFTS</u>					
Age UK Carlisle and Eden		5000.00	Building Society Interest	381.97	244.99
Appleby Day Care		600.00	Donations	322.15	386.00
Appleby Emergency Response Gp	500.00		Shop 1 Sales	14328.44	26661.30
Appleby First Responders	2000.00		Shop 2 Sales	17508.03	32866.76
Appleby Friday Club		600.00	World of Books (Shop 1)		130.45
Appleby Grange		600.00	Nathans Wastesavers	588.80	686.15
Appleby Smarter	900.00	900.00	4G Textiles	125.99	545.89
Blood Bikes	1000.00	1500.00	UK Recycling	166.31	
Eden Carers	500.00	1000.00	EDC Grants re Covid 19	34002.00	
Eden Timebank		1000.00			
Eden Valley Hospice	9500.00	5000.00			
Evergreen		600.00			
Exercise Classes	1005.00	2195.00			
Great North Air Ambulance	8500.00	5000.00			
Hospice at Home	9500.00	5000.00			
Long Marton Community Centre		150.00			
Macmillan Cancer Relief	3500.00	5000.00			
Oaklea Trust		1000.00			
Penrith Hospital		2000.00			
Rampkin House		600.00			
Sundry Donation		500.00			
Talking Messenger	1000.00	1000.00			
Administration and Sundries	1812.21	2665.89			
Cleaning, Repairs and Renewals	321.60	690.91			
Rents, Rates Insurance and Services	13598.21	16469.15			
Set-up shops for Covid 19	3780.12				
	<b>57417.14</b>	<b>59070.95</b>		<b>67423.69</b>	<b>61521.54</b>

### Balance of Funds at 31st December 2020

Shop 1 - 28 Boroughgate	30.00	20.00
Shop 2 - 4 Low Wiend - Float	30.00	20.00
Barclays Community Account	13158.18	3553.60
Cumberland Building Society - No.2 a/c	40602.95	40220.98
	<b>53821.13</b>	<b>43814.58</b>

*A. Apple*  
19/2/21

*independent examiner's report to the trustees of Age Concern, Appleby,  
registered charity No. 517868*

I report on the accounts of the Trust for the year ended 31 December 2020, which are set out on the pages attached.

### **Respective responsibilities of trustees and examiner**

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

It is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act;
- To follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- To state whether particular matters have come to my attention

### **Basis of independent examiner's report**

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

### **Independent examiner's statement**

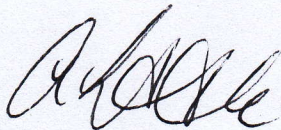
In connection with my examination, no matter has come to my attention:

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

- To keep accounting records in accordance with section 130 of the 2011 Act; and
- To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

Have not been met; or

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



Anthony Little FCA

12 cumwhinton Drive, Carlisle. CA1 3HX

Chartered Accountant

19 February 2021