

# This is caring

Annual  
Report  
2015-16

Financial  
Statements  
2015-16



# Welcome

## However caring affects you, we're here.

Every day 6,000 people become carers, looking after loved ones who are older, disabled or seriously ill.

For some, caring arrives out of the blue, following a birth, an accident, a diagnosis.

For others, caring approaches slowly as family and friends grow older or live longer with disability and illness.

There's nothing more human than helping loved ones get the most out of life, yet this can often take its toll on your own health, career, finances.

Whether you're caring around the clock or balancing caring with work and family life, it can be exhausting. The 'system' can be bewildering. The emotions can be shattering.

Looking after someone can be tough, but you're not on your own. However caring affects you, Carers UK is here to listen, to give you expert information and advice that's tailored to your situation, to champion your rights and support you in finding new ways to manage at home, at work, or wherever you are.



By 2037  
there will be  
**9 million**  
carers



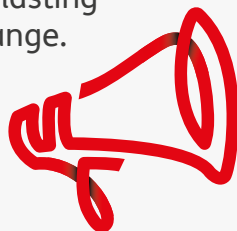
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## Our mission



**We give expert advice, information and support.**

**We campaign together** for lasting change.



**We connect carers** so no-one has to care alone.

**We innovate** to find new ways to reach and support carers.



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**6,000** people  
become carers  
every day





By David Grayson, *Chairman*

“ As Carers UK recently marked the end of its 50th Anniversary year, it’s natural for me not only to report back on our progress during the last financial year, but to consider that progress in the light of the previous half-century.



From Dependent Relative Tax Allowance in 1967 to the development of the Care Act in 2014, we’ve achieved so much as a movement in that time, broadening our cause from that of single women to an issue which will affect just about everybody at some point in their lives.

While the isolation experienced by carers today may rarely be as profound as that experienced 50 years ago, many can still relate to our founder’s description of being under house arrest. That’s something we’re determined to change.

We will achieve this change by continuing to campaign together to address root causes such as inadequate support and poor services. It is right that we note successes along the way, such as protecting Carer’s Allowance and exempting those who receive it from the benefit cap. Sometimes the policy environment is particularly difficult and progress is slow – but as a movement for change, we will keep campaigning until every carer can look after loved ones without putting their own life on hold.

We will achieve this change by supporting each other, breaking isolation through the power of working together as a community. Where our founders had to be content with letters to the newspaper and occasional gatherings in the capital, we are able to bring carers together in local communities and online to make sure that no one has to care alone. The growth and maturity of our volunteering programme last year shows the value of using our own experience and skills as individuals to help others.

We can only achieve this change by inspiring people to share our cause, by working in partnership with organisations and individuals who have funds or capabilities to contribute. We’ve come such a long way over the past 50 years, and we have an ambitious new strategy which sets out the strides we will take together over the next five.

I hope the impact and importance of the work portrayed in this report inspires you to join us as we work towards our vision of a society where carers are respected, valued and supported.

**Together, we will break carer isolation.**



*David Grayson*

By Heléna Herklots, *Chief Executive*



“ This year represents the culmination of our three-year business plan, as we prepare to embark on a fresh five-year vision of what we’re aiming to achieve for carers by 2021.

This vision is based on extensive analysis of carer demographics and the external environment, informed by the views of 1,400 Carers UK members and carers from groups under-represented in our membership, and refined through collaborative workshops with Carers UK staff and Trustees.

So as we look back on the achievements of the year, we are also looking forwards, to the challenges and opportunities that lie ahead.

It has been a challenging year in many ways – these are tough times for charities as we weather political and economic uncertainty. These are also tough times for carers, as we face a cocktail of welfare cuts and loss of services.

Despite these challenges, a glance back at the year shows some important achievements.

We fought hard to protect Carer’s Allowance from cuts that affected other benefits and to submit decisive evidence in a High Court case which led to the Government exempting those receiving Carer’s Allowance from the benefit cap. More needs to be done to address carers’ financial hardship and the chronic underfunding of the social care system, and this remains front and centre of our plans for the next five years.

Our soaring membership figures have helped us to keep carers at the heart of everything we do, underlining the relevance of the support and services we offer to individuals and organisations. As well as helping employers develop carer friendly policies and business practices, we will be making the most of our employer networks over the next five years to reach out to working carers with relevant, timely information to help them manage their caring role.

We’ve been able to invest in our volunteering programme which sits right at the heart of our approach to breaking isolation by connecting carers for support and understanding. The programme has seen huge growth last year, and over the next five years we will be investing further to make this growth truly transformational.

Maintaining our Adviceline so we’re providing expert advice five days a week, we’ve developed the contribution made by volunteers who can use their experience of caring to give emotional support to others. We’ve made better use of our website and social media channels and developed new tools such as our Upfront guide to connect carers quickly with the information that can make such a difference. Over the next five years we will be developing further to ensure we are providing information and advice as efficiently and accessibly as possible.

Huge reductions in local authority budgets and capacity have made it necessary for us to adapt our training and consultancy work, instead providing digital tools to help them deliver efficient and effective support to carers. We’ve refined our app, Jointly, and added e-learning courses and other tools to create a more comprehensive package of support. Developing these digital services to make a difference to carers in communities throughout the UK will be another important strand in our five-year vision.

Most importantly, we’ve been able to build partnership with others who share our mission. We’ve seen successful charity-of-the-year partnerships, influential corporate partnerships and alliances with many other organisations and individuals who recognise the importance of supporting carers. In order to make our vision a reality, we will need to create many more of these partnerships, and harness every ounce of support from our members and supporters.

**Working together, we can make sure that no one has to care alone.**



*Heléna Herklots*

# Annual Report 2015-16

## Our priorities

- 1** Improve the understanding of caring, give carers a stronger voice and secure improvements in policies affecting carers  
*Find out more >> page 10*
- 2** Develop and extend our advice and support for carers >> p14
- 3** Increase and improve our engagement with carers, including through partnerships >> p18
- 4** Improve our systems, support our staff and demonstrate our long term financial position >> p22
- 5** Improve our systems, support our staff and demonstrate quality in all that we do >> p24

## Our values

Carers are at the heart of everything that we do.

We are:

- open and approachable
- inclusive
- expert and innovative
- independent and tenacious
- committed

## A year of partnerships

### Partnerships to develop products and services for carers

#### Unforgettable

Great products have the potential to make a huge difference to carers' lives.

Carers UK is working with innovative partners such as social business Unforgettable, whose founder's personal experience of caring inspired him to create a marketplace of specialised products to help those affected by memory loss and dementia.

*"Unforgettable is delighted to be working with Carers UK, one of the most innovative and caring charities we work with. Caring for my mum was extremely tough and Carers UK provides an invaluable lifeline for thousands like me."*

James Ashwell  
– Founder,  
Unforgettable



“  
Carers UK provides an invaluable lifeline for thousands like me  
”

### Partnerships to raise awareness of caring

#### Carers Week

Carers UK leads a partnership of seven charities to deliver Carers Week. Together we mobilise organisations and individuals throughout the UK, raising awareness of caring at the heart of Parliament and in every corner of the community.

Working together gives our message credibility and amplification (see p13), allowing us to draw attention to the huge contribution carers are making.

Carers Week 2016 was sponsored by Nutricia, Sainsbury's and The Lockwood Charitable Foundation.

*"Nutricia has worked with Carers UK for several years and we are delighted to continue this valuable partnership, supporting the work that they do to ensure that carers get all the information and advice they need."*

Cem Kucukcan – Nutricia UK & Ireland General Manager







“ it is vital we provide the understanding and support our colleagues need ”

## Partnerships to transform the reach of our information

Carers Rights Day is the focal point of our efforts to make sure carers have access to information and advice. This can make such a difference when you're looking after someone. By engaging with hospitals, GP surgeries, libraries and employers as well as carers' organisations, we are able to reach more carers with vital support.

Carers Rights Day 2015 was sponsored by Sainsbury's.

*“As the number of people caring continues to rise, it is vital that we provide the understanding and support our colleagues need, as well as helping support our customers who may be carers.*

*As the Board Champion for Carers & Disability at Sainsbury's, I am proud to be part of an active partnership with Carers UK.”*

*Tim Fallowfield – Corporate Services Director and Company Secretary, Sainsbury's*



## Partnerships to develop our supportive community

### Nesta - Centre for Social Action Innovation Fund

We could not have grown our membership and transformed our volunteering programme without support from Nesta and the Cabinet Office, who recognised what our movement could achieve and helped develop the capacity and infrastructure required to make the most of this potential.

Our growing community of volunteers is right at the heart of Carers UK, providing ways for all kinds of individuals and organisations to offer time, skills and experience to help us achieve our vision.



## Transformational Charity of the Year partnerships

### Coutts and the Cabinet Office

Staff at Coutts and the Cabinet Office chose Carers UK as their charity of the year, recognising the importance of our cause and the impact they could make, from raising funds to helping with strategy development.



# The year by numbers

## We help



**21,399** enquiries handled by Adviceline

**1,613** calls answered by trained Listening Support volunteers

**280** Upfront guide completions each month



“

*What a valuable 24 hours this has been for me thanks to your staff and volunteers!*

*Your volunteer made me feel properly heard and validated. I felt very different at the end of our conversation to the way I had felt at the beginning.*

*Your Adviser has really taken in the problem and offered advice that was very pertinent and helpful. This too was a deeply valuable conversation and from both I've had exactly what I needed!*

”

“

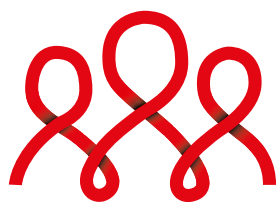
*Reading your Caring magazine reminds me how valuable my role is. Well done Carers UK for raising our profile. Glad to be a member of your movement.*

”

**1,011,947**  
people accessed  
specialist  
information  
online







## We connect

**6,700** hours volunteered

**365** volunteers recruited

**700** entries in creative writing competition

**15,000** carers reached by Carers Week 2015 activities



**8,202** new members joined Carers UK

“

Now I use the forum to let off steam when something's bothering me and I get such good information and encouragement from people who've been through it all before that I really feel like I'm sharing the load. Instead of sitting there with my head in my hands I go away with a practical solution and I feel there's lots of people on my side now. Before, I felt no one was on my side.

The great thing is that now I'm in a position to offer encouragement and understanding to other carers, and that feels good.

”



## We campaign

**£132bn** Value of carers' contribution

**5,035** Articles in the media

**31** Research reports, responses and policy briefings published

**4,572** carers and former carers responded to our 2015 State of Caring survey



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## We innovate

**3,049** people downloaded Jointly



# Campaigning together

## Priority 1: Improve understanding of caring, give carers a stronger voice and secure improvements in policies affecting carers

### What we said we'd do:

- Run high-profile campaigns focusing on the core issues that matter to carers, influencing the incoming Westminster Government and preparing for further changes to and through devolved Governments
- Influence the implementation of health & social care, social security changes and rights at work. Monitor and report on the impact on carers
- Increase public and professional awareness of caring through our 50th Anniversary year

### What we did:

Last year was a year of change. As well as a new Westminster Government, the Care Act 2014 and Children and Families Act 2014 were in force and implementation underway in England, with similar changes in development in Northern Ireland, Scotland and Wales.

#### >> Protecting carers' benefits

Throughout the year we continued to make the case that there is an economic and practical necessity as well as a moral imperative to support carers better.

In the run up to the Emergency Budget in July 2015 there was much speculation that Carer's Allowance would be reduced or frozen. As well as submitting evidence to the Emergency Budget consultation, we produced a report on The Importance of Carer's Allowance which drew attention to the Conservative manifesto promise to 'increase support for full-time carers'. The report made a strong case for this benefit being protected both to recognise carers' role and to prevent financial hardship.

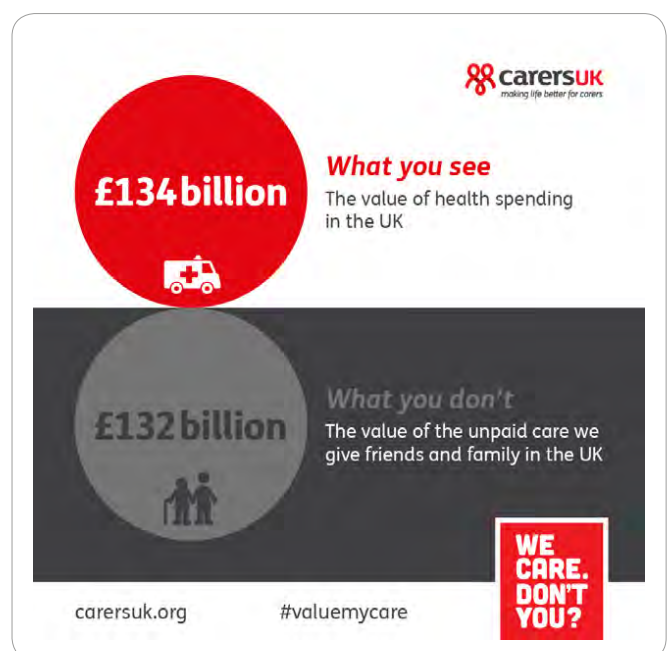
We shared carers' relief when Carer's Allowance was protected from the benefits freeze. While this was an important victory, there could be no celebration, as carers receiving other working age benefits such as income support saw part of their income affected by this freeze.

This year also saw a significant victory in our five-year campaign to change benefit cap rules, as, following a High Court Case in which Carers UK evidence was frequently cited, the Government announced it will change the law to exempt all carers in receipt of Carer's Allowance from the benefit cap.

#### >> Valuing carers

Later in the year we worked with the University of Leeds and the University of Sheffield to update our calculation of the value to the UK economy of the care provided by unpaid carers. The report showed how this annual value had risen from £119 billion in 2011 to £132 billion in 2015. Mostly because carers are providing more hours of care, and partly due to the increased hourly cost of paid home care.

This report provides real backbone to our continued effort to ensure carers' contribution is recognised and carers are valued and supported.



## >> Engaging with politicians and policy-makers

Our inaugural Mary Webster lecture, held at Church House in Westminster, brought senior policy makers, parliamentarians and campaigners together to examine the future policy context for carers and the role of the media in turning a private matter into a public issue.

A staggering 132 MPs attended our Carers Week photocall in Westminster, and many went on to have in-depth discussions, learning about caring directly from carers and representatives from Carers Week partner charities. We built understanding of our research at a roundtable event chaired by Victoria MacDonald, Social Affairs Correspondent for Channel 4 News, with key stakeholders such as the new Minister for Social Care and Communities, NHS England and ADASS.

We were able to build on these relationships during the Party Conference season, where we held fringe debates at the Conservative, Labour and Liberal Democrat conferences. Our debates explored the key challenges and opportunities that changing demographics bring for families, and discussed the policies that could strengthen families as they take on caring responsibilities for older or disabled loved ones.

During the year we submitted evidence to numerous select committees and were cited in reports such as Women & Equalities Select Committee report on gender pay gap and the Lords Select Committee report on Equality Act 2010 and Disability.

## >> Throughout the UK...

With the Social Services and Wellbeing Act (Wales) 2014 coming in to force in April 2016 and elections for the National Assembly for Wales in May 2016, there was plenty to discuss at the first Welsh Carers Assembly last November.

Carers Wales developed the key themes in its Carers Manifesto, setting out the issues carers want politicians and policy makers to address over the life of the next Assembly.

The fourth Carers Parliament in Scotland brought together two carers from every constituency with senior political figures including First Minister Nicola Sturgeon, to discuss topics such as employment, finances, health, services, education, and support when caring ends.

Again, key themes formed part of the Carers Manifesto, calling on all political parties in Scotland to ensure adequate resources to implement the Carers (Scotland) Bill 2016 (now an Act). Carers NI also produced a Manifesto to ensure carers' issues remained on the political agenda.

## ...and beyond

We co-hosted the 6th International Carers Conference in Gothenburg, Sweden to bring together the international community to take a fresh look at the enduring issue of how we can manage care and caring in the face of demographic change.

### Speaking with authority

Over 4,500 carers took part in our annual State of Caring survey, ensuring our policy and campaigning work is built on sound research. As well as those mentioned above, we produced policy reports on Caring into Later Life, Care Quality, Carer Passports, and gathered vital evidence from carers about Care Act implementation.

We presented the accompanying report at our State of Caring conference, where 150 leaders from national and regional organisations gathered to examine practice emerging from the changes in legislation and the accompanying legal, policy and commissioning issues.

### What we will do in 2016-17:

- Influence the Carers Strategy in England and ensure caring is on the agenda in national elections
- Champion and protect carers' rights in health and social care and welfare reform
- Develop a powerful movement of progressive employers committed to providing care positive workplaces



# Speaking out

## In the media

Throughout the year Carers UK has been able to secure extensive media coverage on key issues, shaping the news agenda with our research and taking opportunities to comment on issues affecting carers.

Almost every piece requires not only expert facts, figures and commentary, but also insight into the reality of carers' lives. For this, we are hugely grateful to carers like Anne Brosnan (right) who face the cameras and open up about their experiences, sharing their own perspectives on the importance of supporting carers.



“

The media work I have done with Carers UK has enabled me to raise issues around aspects of care that people are unaware of; e.g. the cost of equipment and the bureaucracy around accessing funding, the hidden health costs to carers around things such as a lack of sleep, and the importance of keeping carers healthy, both physically and mentally.

Most of all it has helped underline the value carers bring to society and the skills we need in order to carry out our role. Being on television, such as the lunchtime news, Meridian News and The One Show has helped highlight what is involved in being a carer and how varied a skillset we need, not only in terms of looking after someone, but also to deal with the amount of paperwork and the time it can take to get things done.

The Meridian piece, in particular, showed what it is like to care for someone with dementia; the monotony of a lot of the tasks involved, and demonstrated how it is not a 'nine to five' role, as carers often have to carry on caring during the night, as well as the day.

Being able to talk about the process of how I came to care for my mother (via Prima Magazine and Radio 5 Live) and the way we chose to do it, also alerted people to the need to start talking to ageing parents early on about what they would want to happen if they were no longer able to look after themselves.

Carers UK have given me access to Members of Parliament and enabled me to represent carers when developing strategies for the future. I have been delighted to have had this opportunity to help give carers a much higher profile in the UK.

Across the year there were 10 appearances on national TV including Emily Holzhausen on This Morning with EastEnders star John Partridge talking about caring with Eamonn Holmes and Ruth Langsford and taking calls from carers.

”

**Thanks to support from Anne and a host of other media case studies, we achieved 5,035 pieces in the media during 2015-16. Overall there were 514,259,764 opportunities for people in the UK to engage with content about Carers UK last year.**

*Some of the highlights include:*

When the Westminster Government launched its call for evidence to inform its new Carers' Strategy, Carers UK achieved coverage on ITV Lunchtime News, as well as securing comments in health and care trade publications including Care Management Matters. Two of our carer media case studies, were interviewed for ITV Lunchtime News about what they hoped the new strategy would deliver for carers, and we also secured an interview with the Minister for Community & Social Care, Alistair Burt.

When Justin Bieber tweeted his support for the NHS Christmas Number One campaign, there was a welcome spike in articles mentioning Carers UK as one of the beneficiary charities.

James Bond himself fronted our Guardian online piece on the value of carers' contribution, part of a media campaign which saw carers sharing personal experiences with the media and generating over 40 articles.

Carers UK secured a five-minute feature on BBC One's The One Show for our Park the Charges campaign. The One Show reaches a daily audience of over a million viewers. For the feature, we set up interviews with Chief Executive Heléna Herklots and two carers who spoke about the impact hospital parking charges have on their lives.



# Carers Week

Leading a partnership of seven charities to run Carers Week each year gives us our strongest platform to raise awareness of caring and celebrate the contribution carers make in communities throughout the UK.

## Raising awareness

Coverage on BBC Radio 2 and BBC Radio 4 in the run-up to Carers Week 2015 built anticipation for the official media launch, which kicked off with new research about how carer friendly our communities are. The research also set out steps we can all take to recognise, value and support carers.

With coverage every day on national news and consumer programmes, as well as interviews with carers several times a day on BBC Radio 2, this was the most successful Carers Week media campaign so far:

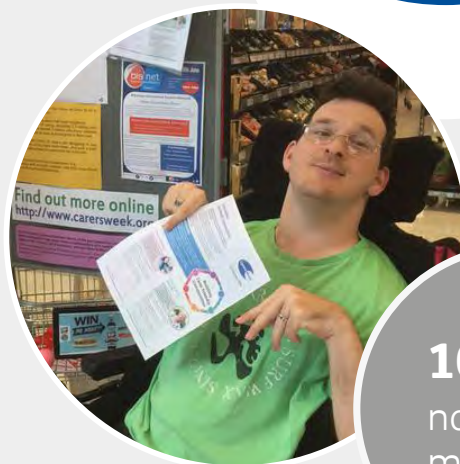
- 135 million media reach
- 1,800 media articles
- 100 national media hits
- 120 case study interviews



**1,800**  
media  
articles

**135million**  
media reach

**Carers Week™**



**100**  
national  
media hits

## Taking action and pledging support

As well as receiving more than 2,000 pledges from individuals including Government Ministers, the Cabinet Secretary and Presidents of the Association of Directors of Adult Social Services, our campaign was bolstered by hundreds of pledges of support and action from organisations including NHS England, the British Medical Association and the Royal Pharmaceutical Society. There were pledges from 169 GP practices, 24 Clinical Commissioning Groups, 45 education providers, 57 domiciliary care services, 62 hospitals and 21 residential care homes.

## Building momentum

We developed a Carer Friendly Checklist to set out the practical steps that every part of the community can take to better support carers. This checklist was downloaded more than 6,000 times during the campaign. The focus on Building Carer Friendly Communities has already started to embed itself as an idea and shape best practice.



# Giving expert advice, information and support

## Priority 2: Develop and extend our advice and support for carers

### What we said we'd do:

- Expand our range of information products and increase their accessibility
- Increase the range of subjects on which we can give expert advice to carers
- Promote our Adviceline more to hidden carers and those in disadvantaged groups
- Further develop our information, advice and support services
- Deliver high quality training to reach and support more carers
- Deliver high quality consultancy services
- Continue the development and roll-out of technology-enabled products and services to support carers

### What we did:

#### >> Adviceline

During the year we continued to operate the Adviceline at full capacity, handling over 21,000 enquiries from carers over the phone and via email.

We continued to develop alternative ways for carers to find relevant, tailored information, so as far as possible the Adviceline was there for those most in need of expert advice.

This included making the most of an enhanced Google Ads Grant to connect carers straight to our core information on topics such as Carer's Allowance. During the course of the year, traffic to this core information rose by 145%, reaching almost 150,000 carers per month.

While the Adviceline is already at full capacity, we recognised that there are some groups we are not reaching with our information and support. We teamed up with Pride Cymru to establish an LGBT+ Volunteer in Wales and similarly sought to understand and remove barriers to access among other demographic and cultural groups.



#### >> Upfront guide

For Carers Rights Day in November 2015 we launched the Upfront guide to help new carers find their way through the maze of rights and entitlements.



Upfront addresses the issue that when we start looking after someone, or when we seek information about caring for the first time, it can be difficult to know where to start. Upfront provides a quick self-assessment tool so carers can answer some short questions about their circumstances and then get a simple, tailored list of the information most relevant to their situation.

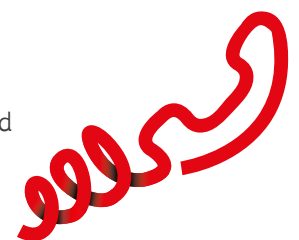
By the end of the financial year, over 250 carers a month were using the guide to access information and support.



#### >> Listening support

Our Listening Support volunteers are all carers or former carers who receive training and then use their experience of caring to provide a vital listening ear to fellow carers who need support or just want someone who can listen and understand their situation.

Last year we were able to expand the service further and now have a team of 23 providing this invaluable addition to our Adviceline service.





## >> Publications

We produced updated factsheets and online information on core topics such as Carer's Allowance and Disability Living Allowance. These two pages alone were accessed more than 470,000 times during the year. We also launched a new Coming out of Hospital factsheet and a Welsh version of our Assessments factsheet.

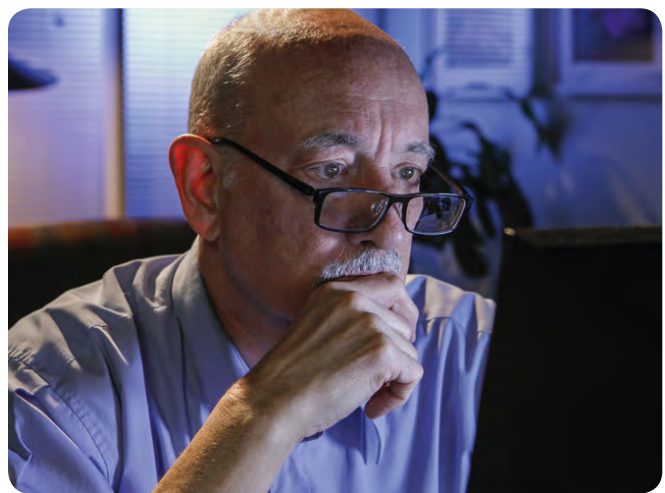
A new 'Ask the Expert' feature was the most-read article in every edition of Caring magazine this year, taking a real scenario and sharing the advisor's response to it. These articles demonstrate that one carer's experience and situation always resonates with many others, and they underline the value of having an expert organisation in your corner.



## >> Technology-enabled products and services

As well as continuing to develop our own care co-ordination app, Jointly (see p22), we forged new partnerships with companies such as Unforgettable. Stemming from its founder's experience of looking after his mother with dementia, Unforgettable is helping to grow a marketplace and reach more carers with technology and products to help with caring.

Over the past year we've changed our approach to training and consultancy to reflect changes in the commercial and local authority landscape. Rather than providing face-to-face training and direct consultancy, we've focused on developing our suite of digital products and services which local authorities and service providers can use to support local carer populations.



## >> Support and information for employers

Our Employers for Carers business forum (EfC) has continued to promote the business case for supporting carers, attracting influential new members such as Network Rail and the Bank of England.

Two of our members, Centrica and the Foreign & Commonwealth Office, were among the winners at the Top Employers for Working Families Special Awards in September.

Carers Scotland has continued to operate the Carer Positive initiative on behalf of the Scottish Government, encouraging employers to create a supportive working environment for carers in the workplace.



## What we will do in 2016-17:

- Improve our digital capability so the answers are available for everyone who needs them
- Mobilise our employer and volunteering networks to reach carers early
- Continue to diversify and expand our range of expert advice and information resources to respond to carers' needs

# The right information, tailored for you

## Emma's story

When you're looking after someone, the maze of rights and entitlements can be bewildering.

Carers UK provides comprehensive information on all aspects of caring, and over a million people visited our online help and advice last year. There's so much information to go through that it can be daunting – so we developed our Upfront guide so carers can answer some simple questions and get straight to the right information for their particular situation.

Having the right information is one part of the challenge – making sure carers get hold of that information early in their caring journey is another. Over the past year we've promoted the Upfront guide through our Carers Rights Day campaign and through our employer networks, trying to reach carers who are struggling and do not realise there is help and support available.

This is precisely how 25-year-old Emma Bould came into contact with Carers UK and got the information she needed:

“

I care in the evenings and at weekends for my 74-year-old Grandma who has dementia, and my Grandfather cares for her throughout the day.

I was signposted to Carers UK's Upfront guide through a newsletter from my employer. Upfront gave us an invaluable summary of what support we are entitled to and what else could help our circumstances. It was simple and straightforward to use, being self-explanatory enough for even my 85-year-old, computer-illiterate, Grandfather to use!

After completing it together and reading the personalised summary, we realised my Grandad is entitled to a carer's assessment. This has allowed him to support my Grandma with specialised respite care, so he can get a well-deserved break and a weekly game of golf!

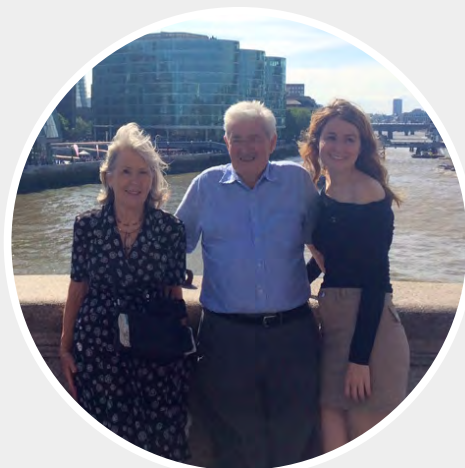
We previously assumed that he wasn't entitled to anything, especially as the doctors and people from social services that he deals with every day didn't mention he might be entitled to support.

Caring day-in, day-out for my Grandma, dealing with her high support needs and aggressive behaviour, terribly affects both our health – without this small amount of respite that my Grandfather now gets, I believe we would have hit breaking point.

” *Emma Bould*



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# This is caring

To mark our 50th Anniversary, we commissioned Magnum photographer Chris Steele-Perkins to capture moments in carers' everyday lives to open up the practical and emotional reality of looking after someone.

The highs of being there for our family or friends, expressing our love and helping them get the most out of life. The lows of feeling isolated and unsupported, unable to have a life of our own outside of caring.

Each set of words and images celebrates the relationship between carers and those we care for, showing the everyday rhythm of caring while also conveying the extraordinary struggles – with exhaustion, with bureaucracy, with finances – that lie just beneath the surface.

As well as being part of a Guardian feature to raise awareness of caring, these words and images helped us launch our 50th Anniversary appeal, securing support from individuals and businesses who recognise the importance of our cause.



“  
These issues are  
the fundamentals  
of the kind of  
society we live in.

” *Chris Steele-Perkins*



“

I have always been involved with photographing social issues: homelessness, law and order, prisons, poverty and, on a number of occasions, care and carers.

I want to document these issues because they are fundamentals of the kind of society we live in and, where possible, work with organisations trying to improve them.

I have had a relationship with Carers UK over many years and am very happy to have taken these photographs for them to mark their 50th Anniversary; photographs describing a variety of carers and the cared for in their daily lives: how they cope, how they care, how they love.

” *Chris Steele-Perkins, photographer*



# Connecting carers so no-one has to care alone

## Priority 3: Increase and improve our engagement with carers

### What we said we'd do:

- Recruit 5,000 new members
- Recruit 340 new volunteers
- Recruit 50 new carer group members
- Sign up 1,500 local groups and organisations to Carers Week

### What we did:

#### >> A supportive online community

Last year our membership growth continued to accelerate, with 8,202 people joining Carers UK at an average rate of almost 700 per month. Our total membership reached beyond 28,000.

At the heart of this huge group of people unified by their experience of caring is our online forum – a place where members can bring all the challenges, decisions and emotions that caring brings, and find support and understanding from others who've been there and know what it's like.

When we're caring, we can easily become so focused on the needs of the person we are looking after that we neglect to pay attention to our own needs, health and feelings. It is therefore often with a sense of urgency and being overwhelmed that people are moved to seek support on our online forum. That makes it so important that every new member is welcomed and every post answered.



“

*I simply wanted to share just how much I appreciate your rapid, caring and thoughtful responses. You definitely 'get it' and as I read the first responses, I burst into tears with relief. I am really glad I posted and thank you, thank you.*

”

During the year there were 26,000 new posts on the Carers UK Forum. By answering questions, sharing experiences and simply being there to listen and say 'I understand', our online community helped make thousands of people caring for loved ones feel less alone.

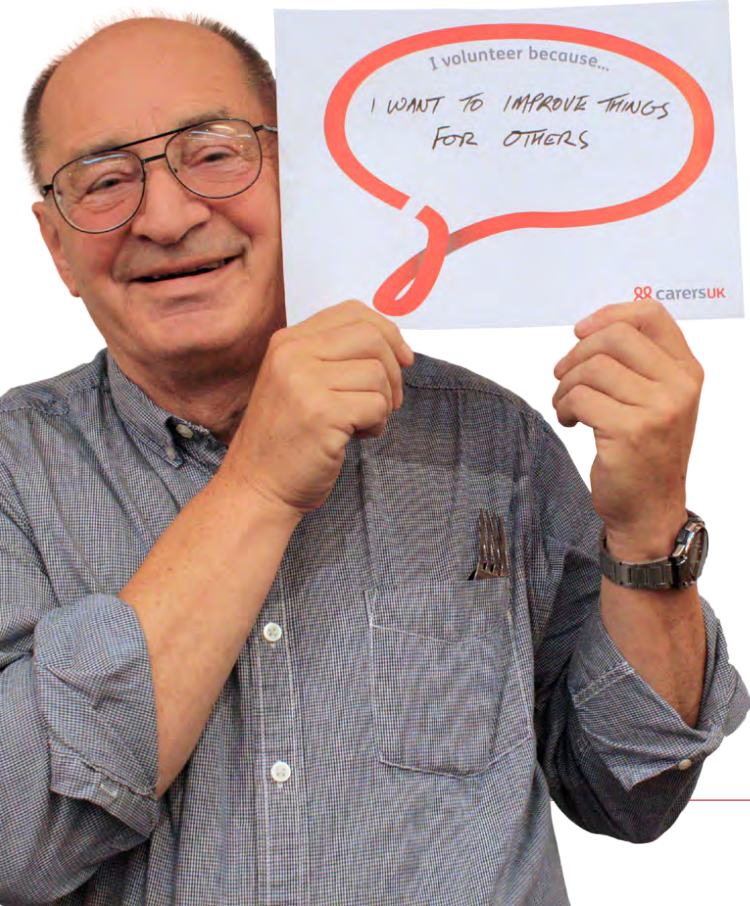
The online community is sustained thanks to a small group of Volunteer Moderators who use their experience and understanding, with some support and training, to ensure that discussion flows, that all posts are replied to, and that inappropriate comments are removed and disagreements resolved.

#### >> A supportive local community

As the highlights on page 13 show, nearly 1,000 organisations registered for Carers Week 2015, holding local events and activities to raise awareness of caring, reach out to carers and celebrate the contribution carers make to families and communities throughout the UK.

Around the same number of organisations took part in Carers Rights Day, to ensure carers get the right information and are aware of their rights and entitlements.

We continued the pilot Local Carers Group programme in Wales, to better understand the potential impact of small volunteer-run groups of carers and the input from Carers UK that would be required to make sure these groups flourish. We also reviewed our Affiliate Membership offer, ensuring we make the most of our expertise and the strength of our network to improve local services.



**A growing  
volunteering  
programme  
(365 new volunteers  
in 2015–16)**

**I care**

Our Volunteering programme has continued to flourish, recruiting an average of one volunteer every day of the year and exceeding our target of having a community of 500 volunteers by the year end.

Composed primarily of carers at the later stages of their caring journey, including many whose caring has come to an end, the network provides an opportunity for volunteers to use their caring experience to help enact the kind of support that they themselves would have found valuable at the outset.

During the year we launched new roles ranging from Local Awareness Volunteers, focused on distributing information in their local community, to Caring Callers who make welcome phone calls to new members, to Insight Volunteers who provide valuable feedback on Carers UK products and services.



**>> Creative writing competition**

Caring is at the heart of the human experience, and nowhere is this more evident than in our creative writing competition.

Our second competition welcomed poems and short stories from all over the world on our 50th Anniversary theme: “No one should have to care alone”. We received around 700 entries from which we produced an anthology to bring caring alive and open up the emotional reality of what it’s like to look after a loved one.

Among the many wonderful entries we received for the creative writing competition, there was one particular poem which caught the attention of carers in our social media community. While the poem did not win a prize in the competition, it expressed something about the heart of caring which other carers instantly recognised and were inspired to share online.



**Who cares for that carer?**

*‘Who cares for that carer?’ I hear a man say,  
‘Her day blends with night and then night becomes day,  
The cooking, the cleaning, the hospital trips,  
The changing, the bathing, wiping food from his lips,  
The meltdowns, the tears... so hard to endure,  
What keeps her from walking straight out of that door?’  
I’ll tell you what stops me from leaving each day,  
And what gets me through when I don’t want to stay,  
It begins with an ‘I’ and ends with an ‘e’,  
It’s a power, a force, emanating from me,  
An empathic heart, a gift from above,  
I do this, my friend, in the name of LOVE.*

– Megan Jenkins

**What we will do in 2016–17:**

- Recruit 8,000 new members and 235 new volunteers
- Bring together all our employer services into a single, integrated approach for maximum impact
- Engage 1,500 groups in running Carers Week activities to raise awareness of caring

# Growing a community of volunteers

**“I was so relieved to have someone listen”**



When Alison Blackhurst was desperately searching for information to help organise her mum’s care, it was the compassion of a Carers UK volunteer that made all the difference.

“

My mum had faced many challenges in her life: breast cancer, bowel cancer, diabetes, two strokes, the loss of my dad and many more illnesses. When the diagnosis came that confirmed her vascular dementia, I made the decision instantly that she would move in with me so I could be there for her every step of the way.

Seeing mum losing her independence and struggling to complete even the simplest of tasks was so difficult. The once confident and capable mum who loved socialising was slowly slipping away from me like a photograph fading from colour to black and white.

In January of this year mum was admitted to hospital. Her care package was increased and we agreed to arrange overnight care at home to give me some rest. I spent days searching and ringing agencies across the North West, but I was getting nowhere fast and becoming exasperated.

I really was at the end of my tether with no one to support or help me. That was when I called the Carers UK Adviceline and spoke to a Listening Support Volunteer. I was so relieved to have somebody listen to me.

They also asked how I was. I had never really had anyone ask me how I was feeling and it was so reassuring to know that there was somebody at the end of the phone who cared enough to ask. That compassion

made me think about how I could give back to other carers too. I wish I had contacted Carers UK sooner on the days when I felt so lonely and down.

I cared for mum for three and a half years until she passed away at home in March. After she died everything went quiet. The day after mum’s funeral, the house went from eight calls per day, from district nurses, visits from care workers and many other professionals, to being completely silent.

I felt lost and like my main purpose in life had ended so abruptly. That’s when I remembered saying to my daughter, 12 months previously: ‘When the inevitable does happen with mum, I want to volunteer for Carers UK!’ So after the dust had settled, I sent in my application form.

Now I volunteer because I want to help those carers who may not know that others are facing the same issues in their day-to-day lives. I want to help signpost carers to the support they can receive, just like the volunteer who helped me.

Three months on and life has changed a lot, though I still miss mum so much. I know she will be proud that I am helping other carers who are facing many of the same challenges that I faced.

”

## Richard Cross, Cambridge

“ I know there are still far too many carers out there without the support they need. And now I have travelled the end-of-life path with my wife, Sheila, I want to use my experiences to help other carers who are also facing this part of their caring journey.

If I can help them, or influence those who have the power to make changes in any way, then that will be my tribute to my lovely Sheila’s memory and gratitude to all those I know at Carers UK who have helped and supported me throughout these last few weeks.

”



*Richard, pictured right*



## Jacqui Darlington, Rutland

“ The best thing about volunteering is seeing the relief in other carers’ faces when they realise that they are not alone and there is support that they can get. As a volunteer the role fits around my caring commitments and that makes volunteering so much easier to do as it is adaptable.

It also helps me to break the isolated world that I often find myself in as I live with and care for my son who has Down’s syndrome, autism and limited speech, and if I was not doing this volunteering role I would go days without having a proper conversation with another adult. ”



Jacqui, pictured left



Kate

## Kate Keays, Sussex

“ As a former long-term carer for over 25 years, for much of that time I did not appreciate the support that was available to me, nor did I recognise my role as a carer. I have frequently looked back and said ‘I wish I had known then what I know now.’

Volunteering for Carers UK has now become a way of life, whether that is attending events, speaking to groups or simply signposting carers to Carers UK, as well as all our local carers’ services.

It is extremely rewarding to be able to help other carers receive the support they need. ”

## Áine O’Connell, Belfast

“ I had become very insular and introverted whilst caring for my elderly parents. Nobody understood me, I felt so alone! The decision to apply to become a Listening Support Volunteer really changed my life around.

After my training, I started, rather nervously, by taking calls on the Adviceline. Boy did that put my life in perspective! I came off each shift mentally exhausted, but the sense of achievement, and finally interacting with people again, slowly but surely increased my confidence.

I have made new understanding friends through my volunteering, I have started to come out of my shell and I feel that I finally have a purpose again in life apart from simply caring for my very elderly parents who won’t be with me forever. ”



Áine

# Innovating to find new ways to reach and support carers

## Priority 4: Increase our income and improve our long-term financial position

### What we said we'd do:

- Develop Jointly to enable the app to communicate with other digital devices and platforms and provide a more comprehensive 'wraparound' service to users
- Work with commercial partners to develop and market technology-enabled products and services
- Extend our range of e-learning products for carers

### What we did:

#### >> Growing and developing sources of income

Our expanding volunteer programme has raised our profile in local communities and boosted our capacity to inspire individuals and groups to take part in sponsored challenges and run their own events to raise funds for Carers UK.

From bake sales and quiz nights to charity singles, our income from community fundraising almost doubled last year, thanks to some remarkable individual efforts and the support of local rotary and social clubs, businesses, schools, colleges and the wonderful NHS Choir. At the same time, income from challenge events fundraising grew by 30%.

Our thanks to our patrons Johnnie and Tiggy Walker and the 50th Anniversary Appeal Board who lifted our profile and helped us raise money from individuals and funders across the UK.

Our first Charity of the Year partnerships with the Cabinet Office and Coutts, and with LloydsPharmacy's National Carers Awards 2015, show just how important caring is to individuals, families and society as a whole.



#### >> Ensuring the best value for money

Last year we reviewed our suppliers and services to make our expenditure as lean and efficient as possible. We were able to find 14% worth of savings in areas such as office and administration costs. This contributed to our being able to sustain our rate of expenditure so that we spend 88p in every pound on our charitable services to make life better for carers.

#### >> Developing products and services to support carers

We have continued to use our expertise to provide products to carers, both directly and through service providers. This provides an income stream as well as playing an important role in our mission to make life better for carers.



#### >> Developing Jointly

We developed an open Application Programming Interface (API) for our care co-ordination app, Jointly, enabling it to connect with other platforms and devices, adding more information to the Jointly circle.

Following feedback from Jointly users we selected a medication dispenser as the first device Jointly would connect to and have been working closely with an industry partner to make this happen.

We also responded to user feedback by improving existing features and adding a new function to give users greater flexibility in logging and categorising information in the app.





## >> Shaping our business model

We worked with the Cabinet Office and industry partners to develop a new business model for our digital products, bundling them into an integrated offer for local authorities and employers. This allows them to give carers in their area instant access to a range of digital products and online resources.

Six early adopters have blazed the trail for the Digital Resource for Carers, helping to make the case for its effectiveness. It consists of a tailored landing page which enables a local authority or employer to combine Carers UK's resources with their own information links to care and support. This creates a truly comprehensive resource for carers in any locality or workplace.

## >> Bringing our e-learning in-house

We brought the development of our e-learning in-house, enabling us to offer a better customer experience, and giving us the flexibility to develop more courses in the future, co-producing them with carers.

We updated About Me, our resilience e-learning course for carers, and our e-learning course for line managers, Supporting Carers in your Workplace, to ensure they are in line with latest legislative and policy developments, and to give them a fresh new feel. With our partner Nutricia we created a new e-learning resource on nutrition which is freely available on Carers UK's website as well as being included in the Digital Resource for Carers.

## >> Gathering insight

We supported the recruitment of a group of 200 Insight Volunteers who use their own experiences of caring to provide valuable feedback on the development of our new digital products, services and resources.

We also worked with industry partners to explore the development of new products and services which can support carers and their loved ones, giving them valuable insight into the needs of carers supported by our own Insight Volunteers.

As well as using carers' experience to shape our own products, we also worked with third sector partners and professional bodies to contribute to their research and development activities. For example, recruiting a group of carers to co-produce best practice resources for social workers.

## What we will do in 2016-17:

- Develop Jointly and to connect it to more platforms and devices
- Roll out the Digital Resource for Carers to more local authorities and employers, helping them to reach more carers with the support they need when they need it
- Work with industry partners to develop and roll out new products and services which can support carers and their loved ones
- Work in partnership with individuals, trusts and companies to raise invaluable funds for Carers UK



# Innovating to find new ways to reach and support carers

## Priority 5: Improve systems; support staff; demonstrate quality in all we do

### What we said we'd do:

- Expand the skills of our staff and volunteers
- Demonstrate quality through undertaking an external quality mark
- Further improve our systems and infrastructure to support and measure the impact of our national volunteer programme

### What we did:

#### >> Volunteering hub

In September 2015 we launched our online Volunteer Hub, a safe place for volunteers to share tips, challenges and stories within a peer led community. The Hub also enables us to gather monitoring data and create a personalised dashboard showing how many hours volunteers have given and how many carers have been helped as a result of that volunteering.

This simple infrastructure has enabled us to accelerate the growth of this community of volunteers and strengthen its position right at the heart of the charity.

#### >> Working towards PQASSO

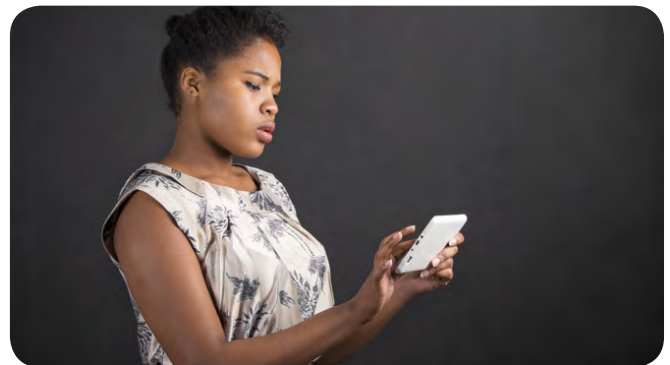
During the year we gathered evidence to demonstrate how Carers UK meets the criteria for the PQASSO quality mark, both levels one and two. This involved staff forming cross-department working groups to examine every aspect of our business, from the way we communicate with external stakeholders to the way we handle complaints.

The process of self-examination and evidence gathering underlined many areas of real strength as well as unveiling opportunities to develop our work, whether to meet the PQASSO criteria or to push beyond them. We completed the PQASSO self-assessment, with the site visit from the assessors held later in the summer.

#### >> Corporate dashboard

From the reach of our online information to the number of staff training courses undertaken, there are dozens of measurements we make to monitor our progress towards achieving the goals in our annual business plan. We brought these key metrics together into a single Corporate Dashboard this year, providing an at-a-glance guide for our Board of Trustees, as well as showing how progress in one area can unlock potential in another.

The dashboard provides a strong platform for the development of our digital strategy, setting out the steps we will take over the next five years to ensure we are making the most of technology both to deliver services and to work effectively.



### What we will do in 2016-17:

- Achieve PQASSO Level 2 and embed ongoing improvement through reviewing and renewing organisational policies and practice, and learning and development
- Work towards a five-year digital strategy with a step change in the reach and targeting of our services

A hand is shown using a red calculator on a desk. In the background, there is a laptop and a computer monitor. The scene is set in an office environment with a blurred background of papers and office equipment.

# Financial Statements 2015-16

### Our aims

Our aims were set out in our Memorandum of Association by our founders and, although the language may now sound a little old fashioned, the Trustees still believe these to be a fair description of why we are here, and how we provide what is now referred to as “public benefit”.

They are:

- To alleviate the conditions of life amongst people who are caring or who have cared for elderly, sick, disabled, handicapped or otherwise infirm persons at home (“carers”) and who are in necessitous circumstances, and of dependants of carers being dependants who are themselves in necessitous circumstances, and for that purpose to promote the material welfare of such carers
- To relieve and alleviate, and to advance, promote, encourage and assist in the relief or alleviation of all kinds of mental and physical infirmity, sickness, disablement or handicap including mental illness attributable to caring, amongst carers and those persons for whom they are caring
- To advance education concerning caring amongst carers and the public.

### Governance

As a membership organisation, our members vote to elect at least two thirds of our Board of Trustees and these are joined by others who are co-opted by the Board because they have particular skills or experience which the Board needs. The majority of our trustees must be carers or former carers, and this ensures that our organisation is always run by people who understand what it is to be a carer.

The Board, supported by its committees (see back page for details), approves the overall strategy. The operational management of the charity is delegated to the Chief Executive, supported by a Senior Management Team, who makes regular reports on progress against the

agreed Business Plan to the quarterly meetings of the Board.

### Remuneration Policy

Carers UK is committed to a remuneration strategy that enables the charity to attract and retain appropriately skilled, experienced and qualified staff who can help realise our vision of a society that respects, values and supports carers.

Remuneration comprises salary, pension contributions and other benefits and is periodically, but as a minimum of every three years, benchmarked against those for people in comparable roles and organisations.

The Remuneration Committee sets and annually reviews the Chief Executive’s remuneration. It is also responsible for approving Senior Management Team salaries.

The Committee is chaired by the Treasurer, and its membership is the Honorary Officers of Carers UK. This is the Treasurer, Chairman and Vice Chairs.

### Strategic Priorities

Our current plan has been summarised into five Strategic Priorities:

1. Improve understanding of caring, give carers a stronger voice, and secure improvements in policies affecting carers
2. Develop and extend our advice and support for carers
3. Increase and improve our engagement with carers including through partnerships
4. Increase our income and improve our long-term financial position
5. Improve our systems; support our staff; and demonstrate quality in all we do.



### **Vice Presidents**

Rt Hon the Baroness Bottomley of Nettlestone PC DL  
Don Brereton CB  
The Baroness Flather DL  
Dr Hywel Francis MP  
The Baroness Pitkeathley OBE  
Dame Philippa Russell DBE  
Caroline Walters OBE

### **Chief Executive**

Heléna Herklots

### **Company Secretary**

Marie Magimay

### **Trustees**

Prof David Grayson CBE (Chairman) **FR/GC/R**  
Geoff Almond (Vice Chair) **FR/R**  
Kate Griffiths (Vice Chair) **GC/R**  
Ian Peters (Treasurer) **FR/R**

Bill Beaugié MBE

Catherine Bingham (Chair of Scotland Committee) **GC**

Paula Bryan (elected November 2015)

Terry Bryan **FR**

Kevin Daly (Chair of Northern Ireland Committee) **GC**

Andrew Hensman (elected November 2015)

Richard Jones CBE (retired March 2016)

Freda McEwen (retired March 2016)

Brenda Murray

Paramjit Oberoi (elected November 2015)

Terry Purnell (retired March 2016)

Alex Robinson (retired November 2015)

Vita Snowden

Rosie Tope (Chair of Wales Committee)

Stephen Ward (retired November 2015)

Martha Wiseman **FR**

**FR** Member of the Finance and Resources Committee

**GC** Member of the Governance and Constitution Committee

**R** Member of the Remuneration Committee

For the purposes of the Companies Act 2006, members of the Board of Trustees, none of whom receives remuneration, are deemed directors of the company. They are nominated and elected by the members of Carers UK, or co-opted by the Board, in accordance with the requirements of the

Memorandum and Articles of Association.

### **Principal Bankers**

Co-operative Bank Plc  
80 Cornhill, London EC3V 3NJ

### **Solicitors**

Bates, Wells & Braithwaite  
2-6 Cannon Street, London EC4M 6YH

### **Auditor**

Sayer Vincent LLP  
Invicta House, 108-114 Golden Lane, London EC1Y 0TL

### **Organisation Status**

Carers UK is a company limited by guarantee and a charity registered in England and Wales, and in Scotland, governed by its Memorandum and Articles of Association.

The company's registered office is  
20 Great Dover Street, London SE1 4LX

The decision taken three years ago to invest in income generation capability and capacity to counter the reduction in public funding for charities was the correct one. We have seen year on year improvements in efficiency and effectiveness. However, the external environment remains very tough and the pace and scale of income generation growth has been insufficient to offset periods when unpredictable income such as legacies are lower than usual.

This financial year produced an unrestricted reserves deficit £400,000 lower than budget due primarily to a sharp fall in legacy income and less demand from local authorities for our training and consultancy services, due to cuts to their funding. As a result, overall unrestricted reserves fell to £117,563. This is not in line with Carers UK reserves policy which is to hold liquid reserves equivalent to three months unrestricted expenditure. However, the Trustees have judged this position acceptable as property assets valued at £1,267,526 in the balance sheet are held in a designated fund. Restricted reserves at year end were £322,797.

Although the external environment is likely to remain challenging, the Trustees have thoroughly reviewed our finances and have concluded as follows:

We have had notification of a significant legacy which will be received within the next 12 months. This will give us more than sufficient general funds to meet our reserves policy, as stated above.

An organisational review and restructure to enable us to deliver our new five-year strategic plan has resulted in a decrease in our operational costs. In addition, looking ahead at organisational needs, we have determined that the smallest of the three linked units at Great Dover Street is surplus to requirements and this could be sold should cashflow require us to do so. Likewise, the remaining two units in designated funds could be used for loan financing. We have had confirmation from our

lender that they are supportive of this should we require it.

We have secured a long term loan to smooth over cashflow fluctuations. Our cashflow forecast shows that we will be able to meet our commitments with the benefit of the loan.

Our clear strategy on earned and fundraising income has resulted in growth of multi-year funding and partnerships, and given the property asset valued at £1.3m which we could borrow against, we as Trustees are content that Carers UK is a going concern.

### Financial Review

During the year we spent a total of £3.4m on charitable activities. We increased unrestricted expenditure on charitable activities by £40k (3%). Restricted expenditure decreased by £820k (30%), mainly due to spending down the ITV Text Santa Appeal money (£651k) in 2014-15. To support the choices of our remaining local branches we returned restricted investments and legacy funds totalling £87k in 2015-16 (2014-15 expenditure: £277k). The overall spending on charitable activities is £822k (20%) lower compared to last year due to these reasons.

We have begun the process of developing our new five year strategy and plan for 2016 – 2021. It will include ongoing investment in our income generation to sustain growth, along with developing new sources of income such as our technology and caring products and partnerships. At the same time, we are balancing this with careful cost control. We will continue to be ambitious in our reach and support of carers, but we will need to secure continuing investment into Carers UK to maintain and grow our services.

Our investment in income generation, maintaining existing income streams and creating new ones over the last few years has resulted in growth in a continually difficult economic environment. Donations and legacies

were £1.014m in the year. Fundraising Events grew by £69k to £118k; Corporate income grew by £39k to £195k. The overall cost of fundraising decreased by £17k (4%). Although donations and legacies decreased by £251k to £1.014m this was in the main due to a sharp fall in legacy income of £239k (58%) to £174k.

Incoming resources from charitable activities, received primarily from local authorities and Government, decreased by £249k (12%) to £1.9m. This was mainly due to: decreases in contract income (the Islington contract ended mid-year); decreases in Training income following the restructure carried out in the year; decrease in grant income (final year of Nesta funded programme). Non-public sector income from consultancy, Employers for Carers and sponsorship income increased by £193k (92%) from £209k to £402k.

We continued to maintain tight control of support costs across the organisation at £538k and these constitute 14% of total expenditure (2015: 14%). Governance costs were broadly maintained at last year's level £33k (2015: £42k). Overall, our total resources expended for the year were £3.8m, £774k (17%) lower compared to last year (2015: £4.6m), reflecting our increased levels of expenditure on income generation in the previous year, 2015.

We have been able to commit 88%\* (2015: 91%) of expenditure to our core work of making life better for carers. \*Charitable expenditure is 88% (2015: 91%) of total resources expended excluding other resources expended.

### Reserves

At the end of 2015/16 our reserves were £1,707,886, split as follows:

- Restricted funds, income received for specific programmes: £322,797
- Designated funds, the net book value of the London office building that Carers UK will continue to occupy: £1,267,526
- General funds, unrestricted funds: £117,563 made up of:
  - Net book value of floor space that could be sold: £385,171
  - Unrestricted net current liquid reserves:

(£249,525)

- Long term creditors: (£18,083)

### Risks and reserves

The Board of Trustees has identified the major risks to which the charity is exposed and has put in place systems and procedures to manage those risks. The key risks facing the charity, in common with many other charities in the current economic environment, relate to income generation. We have developed plans to diversify our sources of income in order to manage this risk.

The Finance & Resources Committee reviews the risk register at its quarterly meeting and makes recommendations to the Board.

In recognition of the changing nature of our funding, the Trustees have approved a Reserves Policy which states that:

“unrestricted liquid funds should be held at a minimum of the greater of:

- a) The working capital requirement of a month's total budgeted expenditure or
- b) The amount required to fund an unexpected shortfall in income, set at three months unfunded expenditure, where unfunded expenditure is that which is neither funded by restricted funds or by fee income.

In the event of unrestricted liquid funds falling to within 125% of the minimum figure the Finance & Resources Committee should be notified and they will then meet to determine appropriate action.”

At the end of the year our 'unrestricted liquid funds' were £117,563 which was below both the 'working capital requirement' of £319,466 and the 'amount required to fund an unexpected shortfall in income' of £451,300.



## Statement of Trustees' Responsibilities

The Trustees (who are also directors of Carers UK for the purposes of company law) are responsible for preparing the report of the trustees' and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law 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 charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company 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 Statement of Recommended Practice (SORP);
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK Accounting Standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements; and
- 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 charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the

prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- There is no relevant audit information of which the charitable company's auditors are unaware; and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

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

### Auditors

Sayer Vincent LLP were appointed as the charitable company's auditors during the year and have expressed their willingness to continue in that capacity.

The report of the Trustees has been prepared in accordance with the special provisions applicable to companies subject to the small companies' regime.

Approved by the Trustees on 28 September 2016 and signed on their behalf by

Prof David Grayson, CBE  
(Chairman)

Ian Peters  
(Treasurer)

We have audited the financial statements of Carers UK for the year ended 31 March 2016 which comprise the Group and Carers UK Statement of Financial Activities, the Group and Parent Charitable Company Balance Sheets, the Group cashflow statement and the related notes. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

This report is made solely to the charitable company's members and trustees, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006 and section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005. Our audit work has been undertaken so that we might state to the charitable parent company's members and trustees those matters we are required to state to them in an auditors' 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 charitable company and the charitable company's members and trustees as a body, for our audit work, for this report, or for the opinions we have formed.

## Respective responsibilities of Trustees and Auditors

As explained more fully in the statement of Trustees' responsibilities set out in the report of the Trustees, the Trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view.

We have been appointed as auditors under section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and under the Companies Act 2006 and report in accordance with regulations made under those Acts.

Our responsibility is to audit and express an opinion on the financial statements in accordance with applicable law and International Standards on Auditing (UK and Ireland). Those standards require us to comply with the Auditing Practices Board's Ethical Standards for Auditors.

## Scope of the audit of the financial statements

An audit involves obtaining evidence about the amounts and disclosures in the financial statements sufficient to give reasonable assurance that the financial statements are free from material misstatement, whether caused by fraud or error. This includes an assessment of: whether the accounting policies are appropriate to the group's and the parent charitable company's circumstances and have been consistently applied and adequately disclosed; the reasonableness of significant accounting estimates made by the trustees; and the overall presentation of the financial statements. In addition, we read all the financial and non-financial information in the report of the trustees to identify material inconsistencies with the audited financial statements and to identify any information that is apparently materially incorrect based on, or materially inconsistent with, the

knowledge acquired by us in the course of performing the audit. If we become aware of any apparent material misstatements or inconsistencies we consider the implications for our report.

## Opinion on financial statements

In our opinion the financial statements:

- Give a true and fair view of the state of the group's and the parent charitable company's affairs as at 31 March 2016 and of the group's incoming resources and application of resources, including the group's income and expenditure, for the year then ended
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice
- Have been prepared in accordance with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and regulations 6 and 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended)

## Opinion on other matter prescribed by the Companies Act 2006

In our opinion the information given in the report of the Trustees, for the financial year for which the financial statements are prepared is consistent with the financial statements.

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

We have nothing to report in respect of the following matters where the Companies Act 2006 and the Charities Accounts (Scotland) Regulations 2006 (as amended) requires us to report to you if, in our opinion:

- The parent charitable company has not kept proper and adequate accounting records or returns adequate for our audit have not been received from branches not visited by us
- The parent charitable company's financial statements are not in agreement with the accounting records or returns
- Certain disclosures of Trustees' remuneration specified by law are not made
- We have not received all the information and explanations we require for our audit
- The trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemption in preparing the report of the Trustees and take advantage of the small companies' exemption from the requirement to prepare a strategic report.

Judith Miller (Senior Statutory Auditor)  
28 September 2016

for and on behalf of Sayer Vincent LLP, Statutory Auditors  
Invicta House, 108-114 Golden Lane, LONDON, EC1Y 0TL

Sayer Vincent LLP is eligible to act as auditors in terms of section 1212 of the Companies Act 2006

# Statement of Financial Activities

(For the year ended 31 March 2016)

Including an  
income and  
expenditure  
account

	Notes	Unrestricted funds £	Restricted funds £	Total 2016 £	Total 2015 £
<b>INCOMING RESOURCES</b>					
<b>Donations &amp; Legacies</b>	3	808,424	205,797	<b>1,014,221</b>	<b>1,265,565</b>
Investments		227	-	227	9,690
Publication sales		9,110	10,716	19,826	10,782
Miscellaneous income		21,509	-	21,509	30,648
Trading activities		8,103	-	8,103	13,361
<b>Total generated funds</b>		<b>38,949</b>	<b>10,716</b>	<b>49,665</b>	<b>64,481</b>
<b>Incoming resources from charitable activities</b>					
<b>Giving carers a stronger voice</b>	4	136,606	385,156	<b>521,762</b>	<b>564,591</b>
Providing carers with support		153,088	744,346	897,434	1,030,798
Education, influence and training		131,618	354,443	486,061	559,232
<b>Total income from charitable activities</b>		<b>421,312</b>	<b>1,483,945</b>	<b>1,905,257</b>	<b>2,154,621</b>
<b>Total incoming resources</b>		<b>1,268,685</b>	<b>1,700,458</b>	<b>2,969,143</b>	<b>3,484,667</b>
<b>RESOURCES EXPENDED</b>					
<b>Cost of generating funds:</b>					
Fundraising costs		377,535	-	377,535	394,778
Trading activities	11	207	-	207	21,047
<b>Charitable activities</b>					
Giving carers a stronger voice		335,475	473,284	808,759	1,074,780
Providing carers with support		576,995	797,005	1,374,000	1,417,888
Education, influence and training		514,986	671,524	1,186,510	1,699,018
<b>Total charitable activities</b>		<b>1,427,456</b>	<b>1,941,813</b>	<b>3,369,269</b>	<b>4,191,686</b>
<b>Other expenditure</b>	5	-	86,586	86,586	-
<b>Total resources expended</b>		<b>1,805,198</b>	<b>2,028,399</b>	<b>3,833,597</b>	<b>4,607,511</b>
<b>Net incoming/(outgoing) resources before transfers</b>	6	(536,513)	(327,941)	<b>(864,454)</b>	<b>(1,122,844)</b>
Unrealised (losses) on investments	10	-	(5,800)	(5,800)	3,449
<b>Transfers between funds</b>		(15,681)	15,681	-	-
<b>Net movements in funds for the year</b>	17	(552,194)	(318,060)	<b>(870,254)</b>	<b>(1,119,395)</b>
<b>RECONCILIATION OF FUNDS</b>					
<b>Total funds brought forward</b>		1,937,283	640,857	<b>2,578,140</b>	<b>3,697,535</b>
<b>Total funds carried forward</b>		1,385,089	322,797	<b>1,707,886</b>	<b>2,578,140</b>

All of the above results are derived from continuing activities. There were no other recognised gains and losses other than those stated above. Movements in funds are disclosed in Note 17 to the financial statements.



# Balance Sheet

(as at 31 March 2016)

	Notes	The Group		The Charity	
		2016	2015	2016	2015
		£	£	£	£
<b>Fixed assets</b>					
Tangible fixed assets	9	1,652,697	1,716,359	1,652,697	1,716,359
Investments	10	-	57,877	-	57,877
		<u>1,652,697</u>	<u>1,774,236</u>	<u>1,652,697</u>	<u>1,774,236</u>
<b>Current assets</b>					
Debtors	13	330,551	583,528	330,551	573,528
Cash on deposit: Head office and UK branches		3,872	399,732	3,872	399,732
Cash at bank and in hand: Head office		52,770	267,941	47,465	233,580
Cash at bank and in hand: UK branches		-	32,185	-	32,185
		<u>387,193</u>	<u>1,283,386</u>	<u>381,888</u>	<u>1,239,025</u>
<b>Current liabilities</b>					
Creditors: amounts falling due within one year	14	(313,921)	(431,584)	(304,753)	(375,632)
<b>Net current assets</b>		<u>73,272</u>	<u>851,802</u>	<u>77,135</u>	<u>863,393</u>
Creditors: amounts falling due after one year	15	(18,083)	(47,898)	(18,083)	(47,898)
<b>Net assets less current liabilities less creditors falling due after one year</b>		<u>55,189</u>	<u>803,904</u>	<u>59,052</u>	<u>815,495</u>
<b>Total net assets</b>	16	<u>1,707,886</u>	<u>2,578,140</u>	<u>1,711,749</u>	<u>2,589,731</u>
<b>Funds</b>					
Restricted	17	322,797	640,857	322,797	640,857
Designated funds		1,267,526	1,710,767	1,267,526	1,710,767
General		117,563	226,516	121,426	238,107
<b>Total funds</b>		<u>1,707,886</u>	<u>2,578,140</u>	<u>1,711,749</u>	<u>2,589,731</u>

Approved by the Board of Trustees on 28 September 2016 and signed on its behalf by:

Prof David Grayson, CBE  
(Chairman)

Ian Peters  
(Treasurer)

The notes on pages 35 to 47 form part of these financial statements.

# Cash Flow Statement

(For the year ended 31 March 2016)

	2016	2015
	£	£
<b>Reconciliation of operating surplus to net cash outflow from operating activities</b>		
Net incoming/(outgoing) resources before revaluations	(864,454)	(1,055,282)
Investment income	(227)	(9,690)
Depreciation charges	70,327	69,216
Transfer of branch investments to branches	52,077	-
(Increase)/decrease in debtors	252,977	(56,404)
Increase/(decrease) in creditors	(147,478)	(124,456)
Net cash inflow/(outflow) from operating activities	<u>(636,778)</u>	<u>(1,176,616)</u>
<b>Cash flows from capital expenditure</b>		
Purchase of tangible fixed assets	(6,665)	-
	<u>(6,665)</u>	<u>-</u>
<b>Cash flow statement</b>		
Net cash inflow/(outflow) from operating activities	(643,443)	(1,176,616)
Returns on investment	227	9,690
Transfer of branch funds to branches		
Increase/(decrease) in cash	<u>(643,216)</u>	<u>(1,166,926)</u>
Net cash inflow/(outflow) before management of liquid resources and financing	(643,216)	(1,166,926)
Management of liquid resources		
(Decrease)/increase in cash	<u>(643,216)</u>	<u>(1,166,926)</u>
<b>Reconciliation of net cash inflow to movement of net funds</b>		
Increase/(decrease) in cash for the year	(643,216)	(1,166,926)
Cash used to increase liquid resources		
Change in cash and liquid resources	<u>(643,216)</u>	<u>(1,166,926)</u>
Cash and liquid resources as at 1 April	699,858	1,866,784
Cash and liquid resources as at 31 March	<u>56,642</u>	<u>699,858</u>
<b>Notes to cash flow statement</b>		
<b>Note (i) gross cash flows</b>		
<b>Returns on investment</b>		
Investment income	<u>227</u>	<u>9,690</u>
	<b>As 1 April 2015</b>	<b>At 31 March 2016</b>
Cash in hand, at bank	699,858	(643,216)
Liquid resources		
	<u>699,858</u>	<u>(643,216)</u>
	<u>56,642</u>	<u>699,858</u>

## 1. Accounting Policies

### (a) 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 2015) - (Charities SORP FRS 102 (August 2014) and the Companies Act 2006.

The charitable company 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 or note.

These financial statements consolidate the results of the charitable company and its wholly-owned subsidiary Carers UK Trading Limited on a line by line basis. Transactions and balances between the charitable company and its subsidiary have been eliminated from the consolidated financial statements. Balances between the two companies are disclosed in the notes of the charitable company's balance sheet. A separate statement of financial activities, or income and expenditure account, for the charitable company itself is not presented because the charitable company has taken advantage of the exemptions afforded by section 408 of the Companies Act 2006.

### (b) Reconciliation with previously Generally Accepted Accounting Practice (GAAP)

In preparing the accounts, the trustees have considered whether in applying the accounting policies required by FRS 102 and the Charities SORP FRS 102 a restatement of comparative items was required. The transition date was 1 April 2014.

At the date of transition in applying the requirement to recognise liabilities arising from employee benefits, a liability was recognised for short-term compensated absence arising from employee entitlement to paid annual leave. The initial liability recognised at the date of transition was for the holiday entitlement carried forward and for the entitlement arising in the year which was due but not taken. The initial liability was for

£67,562. No other restatements were required.

### (c) Going concern

The trustees consider that there are no material uncertainties about the charitable company's ability to continue as a going concern. Key judgements that the charitable company has made which have a significant effect on the accounts include estimating the liability from multi-year grant commitments. The trustees do not consider that there are any sources of estimation uncertainty at the reporting date that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next reporting period.

Total unrestricted funds ended the year at £1.385m, which includes £1.643m relating to the Great Dover Street property and negative unrestricted net liabilities of £250k. The Charity is underpinned by ownership of the Great Dover Street property which is made up of 3 units. The trustees could sell one of the units which is surplus to requirement due to having a smaller staff team. The profit on the sale of the property will give the charity sufficient liquid funds to meet short-term cashflow requirements. The trustees have received notification of a significant legacy which will be paid within the next 12 months. This will give the charity sufficient general funds to meet its reserves policy which is three months' unfunded expenditure or one month's total budgeted expenditure, whichever is the greater.

On the basis of the information above, the trustees consider that there are no material uncertainties about the charitable company's ability to continue as a going concern.

### (d) Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the income have been met, it is probable that the income will be received and that the amount can be measured reliably.

For legacies, entitlement is taken as the earlier of the date on which either: the charity is aware that probate has been granted, the estate has been finalised and notification has been made by the executor(s) to the charity that a distribution will be made, or when a distribution is received from



the estate. Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably and the charity has been notified of the executor's intention to make a distribution. Where legacies have been notified to the charity, or the charity is aware of the granting of probate, and the criteria for income recognition have not been met, then the legacy is treated as a contingent asset and disclosed if material.

#### **(e) Interest receivable**

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the bank.

#### **(f) Fund accounting**

Unrestricted funds are available to spend on activities that further any of the purposes of the charity. Designated funds are unrestricted funds of the charity which the trustees have decided at their discretion to set aside to use for a specific purpose. Restricted funds are donations which the donor has specified are to be solely used for particular areas of the charity's work or for specific projects being undertaken by the charity.

#### **(g) Expenditure and irrecoverable VAT**

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably. Expenditure is classified under the following activity headings:

- Costs of raising funds comprise of trading costs and the costs incurred by the charitable company in inducing third parties to make voluntary contributions to it, as well as the cost of any activities with a fundraising purpose.
- Expenditure on charitable activities includes the costs of delivering services, exhibitions and other educational activities undertaken to further the purposes of the charity and their associated support costs.
- Other expenditure represents those items not falling into any other heading.

Irrecoverable VAT is charged as a cost against the activity for which the expenditure was incurred.

#### **(h) Allocation of support costs**

Support costs are those functions that assist the work of the charity but do not directly undertake charitable activities. Support costs include office costs, finance, personnel, payroll and governance

costs which support the charity's programmes and activities. These costs have been allocated between cost of raising funds and expenditure on charitable activities. The basis on which support costs have been allocated are set out in note 5.

#### **(i) Operating leases**

Rental charges are charged on a straight line basis over the term of the lease.

#### **(j) Tangible fixed assets**

Items of equipment are capitalised where the purchase price exceeds £5,000. Depreciation is provided at rates calculated to write down the cost of each asset to its estimated residual value over its expected useful life. The depreciation rates in use are as follows:

Leasehold property	2% and 5%
Fixtures and fittings	20%
Computer equipment	20%

#### **(k) 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.

#### **(l) 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.

#### **(m) 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.

#### **(n) Financial instruments**

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

#### **(o) Pensions**

The charity participates in a stakeholder scheme and contributes 5% to the scheme. This is a defined contribution scheme.

2. Detailed comparatives for the Statement of Financial Activities		Unrestricted funds	Restricted funds	Total 2015
INCOMING RESOURCES		£	£	£
<b>Incoming resources from generated funds</b>				
Donations and legacies		930,973	334,592	1,265,565
Investment and bank interest		9,494	196	9,690
Publication sales		10,782	-	10,782
Miscellaneous income		13,903	16,745	30,648
Trading activities		13,361	-	13,361
<b>Total generated funds</b>		<b>47,540</b>	<b>16,941</b>	<b>64,481</b>
<b>Incoming resources from charitable activities</b>				
Giving carers a stronger voice		160,699	403,892	564,591
Providing carers with support		261,503	769,295	1,030,798
Education, influence and training		129,565	429,667	559,232
<b>Total income from charitable activities</b>		<b>551,767</b>	<b>1,602,854</b>	<b>2,154,621</b>
<b>Total incoming resources</b>		<b>1,530,280</b>	<b>1,954,387</b>	<b>3,484,667</b>
<b>RESOURCES EXPENDED</b>				
<b>Cost of generating funds</b>				
Fundraising costs		394,778	-	394,778
Trading activities		21,047	-	21,047
<b>Charitable activities</b>				
Giving carers a stronger voice		343,644	718,326	1,061,970
Providing carers with support		545,774	859,583	1,405,357
Education, influence and training		497,779	1,184,001	1,681,780
<b>Total charitable activities</b>		<b>1,387,197</b>	<b>2,761,910</b>	<b>4,149,107</b>
Governance costs		42,579	-	42,579
<b>Total resources expended</b>		<b>1,845,601</b>	<b>2,761,910</b>	<b>4,607,511</b>
<b>Net incoming/(outgoing) resources before transfers</b>		<b>(315,321)</b>	<b>(807,523)</b>	<b>(1,122,844)</b>
Unrealised (losses)/gains on investments	10	-	3,449	3,449
Transfers between funds		(39,796)	39,796	-
<b>Net movement in funds for the year</b>	17	<b>(355,117)</b>	<b>(764,278)</b>	<b>(1,119,395)</b>
<b>Reconciliation of funds</b>				
<b>Total funds brought forward</b>		<b>2,292,420</b>	<b>1,405,115</b>	<b>3,697,535</b>
<b>Total funds carried forward</b>		<b>1,937,303</b>	<b>640,837</b>	<b>2,578,140</b>

3. Voluntary income	Unrestricted	Restricted	2016	2015
	£	£	£	£
Donations and gifts, including membership	210,152	236	210,388	187,018
Funding for Strategic Partners Programme (a)	-	195,000	195,000	181,000
Legacies	163,695	10,000	173,695	413,090
Corporates	194,978	61	195,039	156,501
Trusts	21,773	500	22,273	163,274
Fundraising events	118,102	-	118,102	49,309
Tax reclaims	10,718	-	10,718	18,856
Others	89,006	-	89,006	96,517
	<b>808,424</b>	<b>205,797</b>	<b>1,014,221</b>	<b>1,265,565</b>

(a) Relates to a grant receivable from Department of Health (DH) as part of the £195K Strategic Partners Programme shared equally between Carers Trust and Carers UK

4. Incoming resources from charitable activities	Contracted services	Grants & trusts (see note 3a)	Training & conferences	Donations & misc.	2016	2015
	£	£	£	£	£	£
Giving carers a stronger voice	-	351,416	20,133	150,212	521,761	564,591
Provide carers with support	185,384	521,914	63,105	127,031	897,434	1,030,798
Education, influence and training	13,957	327,853	19,418	124,833	486,061	559,232
	<b>199,341</b>	<b>1,201,183</b>	<b>102,656</b>	<b>402,076</b>	<b>1,905,256</b>	<b>2,154,621</b>

#### 4a. Grants and donations receivable

2016

2015

The Grants and Donations listed below were expended in accordance with the terms specified in each individual grant. Certain grants were made under an Act of Parliament relating to N.Ireland, Scotland and Wales. These have been annotated with an asterisk below.

	£	£
<b>CHARITABLE ACTIVITIES</b>		
<b>Advice and information</b>		
Santander Foundation	-	9,850
The Drapers Charitable Foundation	6,500	-
The Doris Pacey Charitable Foundation	45,000	-
The 29th May 1961 Charitable Trust	10,000	10,000
The Freemasons Grand Charity	50,000	50,000
The Garfield Weston Foundation	30,000	-
The John Ellerman Foundation	35,316	-



4a. Grants and donations receivable - continued		2016	2015
		£	£
<b>Carers Ambassadors</b>	Department of Health	-	164,000
<b>Carers Week</b>	Sainsbury	-	21,200
<b>Comms, Campaigns, Media, Public Affairs</b>	Sainsbury	-	23,300
	The Lockwood Charitable Foundation	65,000	65,000
	The Esmée Fairbairn Foundation	73,984	-
<b>Technology and Innovation</b>	Nominet Trust	20,000	72,498
<b>Timebank</b>		-	9,256
<b>Carers UK Volunteer Programme</b>	Nesta	146,700	259,880
<b>Other grants</b>	Other grants < £10,000	16,513	-
<b>NATION OFFICES</b>			
<b>Scotland: Work in Scotland</b>	Core grant	171,700	170,000
	Telecare	-	15,000
	Kitemark	60,000	-
	Carers Parliament	41,871	39,205
	Carers Advocacy	-	30,000
	NHS24	28,000	-
	Trusts < £15,000	14,764	17,750
<b>Wales: Work in Wales</b>	Core grant	198,040	208,463
<b>Wales: Volunteer Programme</b>	Waterloo Foundation	9,000	18,000
	Trusts < £15,000	9,600	3,000
<b>NI: Work in Northern Ireland</b>	The Atlantic Philanthropies	81,000	80,000
	DHSSPS (NI) Core grant*	42,143	42,143
	Northern Health and Social Care Trust*	39,552	39,552
	Other grants < £10,000*	6,500	5,500
	Carers UK Branches	Health and local authorities (various)	-
<b>Total grants received for charitable activities</b>		<b>1,201,183</b>	<b>1,366,451</b>

<b>5. Total resources expended</b>	<b>Fundraising costs</b>	<b>Giving carers a stronger voice</b>	<b>Providing carers with support</b>	<b>Education, influence and training</b>	<b>Governance costs</b>	<b>Support costs</b>	<b>2016</b>	<b>2015</b>
	£	£	£	£	£	£	£	£
Staff costs (Note 6)	201,448	477,061	859,782	592,238	-	285,630	<b>2,416,159</b>	2,797,394
Fundraising costs	176,087	-	-	-	-	-	<b>176,087</b>	144,953
Finance	-	-	-	-	-	42,717	<b>42,717</b>	23,939
IT	-	-	-	-	-	66,848	<b>66,848</b>	68,464
General admin	-	-	-	-	-	143,801	<b>143,801</b>	223,074
AGM & Trustees' travel	-	-	-	-	20,933	-	<b>20,933</b>	25,026
Audit fees	-	-	-	-	12,000	-	<b>12,000</b>	11,300
Depreciation	-	21,098	21,098	28,131	-	-	<b>70,327</b>	69,216
Branch activities	-	-	-	-	-	-	-	208,862
Direct costs	207	140,166	320,687	337,079	-	-	<b>798,139</b>	1,035,283
<b>Total</b>	<b>377,742</b>	<b>638,325</b>	<b>1,201,567</b>	<b>957,448</b>	<b>32,933</b>	<b>538,996</b>	<b>3,747,011</b>	<b>4,607,511</b>
Support costs*	-	162,290	157,755	218,951	-	(538,996)	-	-
Governance costs	-	8,144	14,678	10,111	(32,933)	-	-	-
<b>Total resources expended</b>	<b>377,742</b>	<b>808,759</b>	<b>1,374,000</b>	<b>1,186,510</b>	<b>-</b>	<b>-</b>	<b>3,747,011</b>	<b>4,607,511</b>

\* allocated by staff time apportionment

Other expenditure comprises the write-off of cash and investments held within branches following the closure of Carers UK official branches. The funds were effectively transferred to the branch representatives.

<b>5a. Grants awarded</b>	<b>2016</b>	<b>2015</b>
	£	£
(a) Islington Carers Hub (ICH)	100,071	26,060
(b) Department of Health: Strategic Partners Programme	97,500	95,000
(c) Royal Mail Grant	-	20,000
<b>Total</b>	<b>197,571</b>	<b>141,060</b>

Note

(a) Funds to carers in the Islington area for holiday breaks

(b) Grants of £90.5K to Carers Trust as part of the £181K DH Strategic Partners Programme grant given to both charities which includes Carers UK.

(c) Corporate grant from Royal Mail paid out to local carer groups throughout the UK

6. Net incoming resources for the year	2016	2015
This is stated after charging/crediting:	£	£
Depreciation	70,327	69,216
Trustees' remuneration	nil	nil
Trustees' reimbursed expenses: travel, subsistence and care expenses	20,933	25,026
Auditors' remuneration	12,000	11,300
Operating lease rentals	32,629	32,629
Number of trustees whose expenses were reimbursed	12	13

7. Staff costs and numbers	2016	2015
	£	£
Salaries and allowances	2,102,725	2,446,716
Social security costs	210,169	236,315
Pension costs	103,266	114,363
	<b>2,416,160</b>	<b>2,797,394</b>
Total emoluments paid to staff were:	<b>2,205,991</b>	<b>2,561,079</b>
<b>The average weekly number of employees (based on head count) during the year was as follows:</b>	<b>2016 (No.)</b>	<b>2015 (No.)</b>
Charitable	58	65
Support	7	9
Fundraising	6	6
	<b>71</b>	<b>80</b>
Number of employees earning over £60,000	<b>2016</b>	<b>2015</b>
£70,001-£80,000	<b>1</b>	<b>1</b>

The total employee benefits including pension contributions of the key management personnel were £82,386 (2015: £84,552).

The charity trustees were not paid or received any other benefits from employment with the charity in the year (2015: £nil).

No charity trustee received payment for professional or other services supplied to the charity (2015: £nil).



**8. Taxation****2016****2015**

The charity is exempt from corporation tax as all its income is charitable and is applied for charitable purposes. The charity's trading subsidiary Carers UK Trading Ltd gift aids available profits to the charity. Its charge to corporation tax in the year was:

UK Corporation Tax at 20% (2015: 20%)

- -

**9. Tangible fixed assets (group and charity)****Leasehold building****Leasehold improvements****Office / general equipment****Total****£****£****£****£****Cost**

As at 1 April 2015

1,361,012

803,651

9,067

2,173,730

Additions

-

-

6,665

6,665

At 31 March 2016

**1,361,012****803,651****15,732****2,180,395****Accumulated depreciation**

At 1 April 2015

183,789

270,106

3,476

457,371

Charge for year

27,220

40,183

2,924

70,327

At 31 March 2016

**211,009****310,289****6,400****527,698****Net book value**

At 31 March 2016

**1,150,003****493,362****9,332****1,652,697**

At 31 March 2015

**1,177,223****533,544****5,592****1,716,359****10. Investments (held by Branches)****The Group****The Charity****2016****2015****2016****2015****£****£****£****£**

Market value at the start of the year

57,877

54,428

57,677

54,228

Unrealised (loss)/gains

(5,800)

3,449

(5,800)

3,449

Transfer of investments to branches on closure of branches

(52,077)

-

(51,877)

-

Market value at the end of the year

-

**57,877**

-

**57,677**

Historical cost at the year end

21,200

23,263

21,200

23,263

**(All investments at 31 March 2015 were held by Branches.)****Investments are listed and comprise:**

Assets in the UK

30,726

34,148

30,726

34,148

Assets outside the UK

21,351

23,729

21,351

23,729

**52,077****57,877****52,077****57,877**

## 11. Subsidiary undertaking

2016

2015

The charitable company owns the whole of the issued ordinary share capital of Carers UK Trading Limited, a company registered in England. The subsidiary is used for non-primary purpose of trading activities. All activities have been consolidated on a line-by-line basis in the statement of financial activities. Available profits are Gift Aided to the charitable company. The subsidiary is exempt from audit by virtue of S479a of Companies Act 2006. A summary of the results of the subsidiary is shown below.

	£	£
Turnover	<b>8,103</b>	13,361
Cost of sales	-	-
Gross profit	<b>8,103</b>	13,361
Administrative expenses	<b>(207)</b>	(21,047)
Profit/(loss) for financial year	<b>7,896</b>	(7,686)
The aggregate of the assets, liabilities and funds was:		
Assets	<b>5,137</b>	44,363
Liabilities	<b>(9,000)</b>	(55,953)
Funds	<b>(3,863)</b>	(11,590)

## 12. Parent Subsidiary

2016

2015

	£	£
The parent charity's gross income and the results for the year are disclosed as follows:		
Gross income	2,961,038	3,471,306
Results for the year	<b>(878,150)</b>	<b>(1,111,709)</b>

## 13. Debtors

### The Group

### The Charity

	2016	2015	2016	2015
	£	£	£	£
Other debtors	<b>163,844</b>	145,277	<b>163,844</b>	135,277
Prepayments and accrued income	<b>166,707</b>	438,251	<b>166,707</b>	438,251
	<b>330,551</b>	<b>583,528</b>	<b>330,551</b>	<b>573,528</b>

14. Creditors: amounts due within one year	The Group		The Charity	
	2016	2015	2016	2015
	£	£	£	£
Other creditors	148,607	197,491	139,439	141,539
Other taxes and social security	52,538	65,510	52,538	65,510
Subscriptions: receipt in advance	-	8,457	-	8,457
Accruals and deferred income	112,776	160,126	112,776	160,126
	<b>313,921</b>	<b>431,584</b>	<b>304,753</b>	<b>375,632</b>

Deferred income	The Group		The Charity	
	2016	2015	2016	2015
	£	£	£	£
Balance at the beginning of the year	53,191	79,618	53,191	79,618
Amount released to income in the year	(53,191)	(79,618)	(53,191)	(79,618)
Amount deferred in the year	26,515	53,191	26,515	53,191
Balance at the end of the year	<b>26,515</b>	<b>53,191</b>	<b>26,515</b>	<b>53,191</b>

Deferred income comprises income received for a post year-end event.

15. Creditors: due after more than one year	The Group		The Charity	
	2016	2015	2016	2015
	£	£	£	£
HMRC Lennartz	<b>18,083</b>	<b>47,898</b>	<b>18,083</b>	<b>47,898</b>

Following consideration of the charitable company's status for VAT, and in discussion with HMRC in 2008, an agreement has been reached to repay input VAT reclaimed during the renovation the property at 20 Great Dover Street proportional to the non trading activities of the charitable company. A schedule for this repayment, consistent with the Lennartz principle and covering a period of 10 years, is in operation. Of the £18,083 (2015: £47,898) falling due after one year, £nil (2015: nil) remains due after 5 years.

16. Analysis of group net assets between funds	Restricted funds	Designated funds	General funds	Total funds
	£	£	£	£
Tangible fixed assets	-	1,267,526	385,171	<b>1,652,697</b>
Net current assets	322,797	-	(249,525)	<b>73,272</b>
Long term liabilities	-	-	(18,083)	<b>(18,083)</b>
<b>Net assets at the end of the year</b>	<b>322,797</b>	<b>1,267,526</b>	<b>117,563</b>	<b>1,707,886</b>



<b>17. Movements in funds</b>	<b>As at 01/04/15</b>	<b>Incoming resources</b>	<b>Resources expended</b>	<b>Profit/(loss) on investments</b>	<b>Transfers between funds</b>	<b>As at 31/03/16</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Restricted funds</b>						
Advice and information	-	181,868	151,868	-	-	30,000
Carer Ambassador GP Training	39,465	-	39,465	-	-	-
Carers Strategy	-	195,000	195,000	-	-	-
Communications, campaigns, media & public affairs	-	130,932	130,932	-	-	-
Innovation	-	20,000	20,000	-	-	-
Islington Carers Hub	129,005	132,582	261,883	-	296	-
Kensington & Chelsea	68,788	69,788	89,321	-	-	49,255
Primary Care Navigator	10,345	-	-	-	-	10,345
Carers UK Volunteering Programme	216,470	149,915	243,099	-	-	123,286
Nation offices:						
Northern Ireland	45,722	176,965	238,071	-	15,385	1
Scotland	4,058	332,960	322,173	-	-	14,845
Wales	10,845	310,448	250,001	-	-	71,292
Legacy funds:						
West Sussex Carers Fund	23,773	-	-	-	-	23,773
Carers UK Branches	92,386	-	86,586	(5,800)	-	-
<b>Total restricted funds</b>	<b>640,857</b>	<b>1,700,458</b>	<b>2,028,399</b>	<b>(5,800)</b>	<b>15,681</b>	<b>322,797</b>
<b>Unrestricted funds</b>						
<i>Designated funds:</i>						
Office fund	1,710,767	-	-	-	(443,241)	1,267,526
<b>Total designated funds</b>	<b>1,710,767</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(443,241)</b>	<b>1,267,526</b>
<b>General funds</b>	<b>226,516</b>	<b>1,268,685</b>	<b>1,805,198</b>	<b>-</b>	<b>427,560</b>	<b>117,563</b>
<b>Total unrestricted funds</b>	<b>1,937,283</b>	<b>1,268,685</b>	<b>1,805,198</b>	<b>-</b>	<b>(15,681)</b>	<b>1,385,089</b>
<b>Total funds</b>	<b>2,578,140</b>	<b>2,969,143</b>	<b>3,833,597</b>	<b>(5,800)</b>	<b>-</b>	<b>1,707,886</b>

**Funds of Nation Offices** - This relates to funds held in respect of activities based in Northern Ireland, Wales and Scotland

## 17. Continued - Notes on transfers between funds

### Unrestricted funds

- (a) Restricted funds Shortfall in restricted funds being funded by unrestricted funds
- (b) Office funds This represents the net book value of the leasehold building and leasehold improvements to the property at Great Dover Street

### Designated funds

- (a) Office funds Transfers from general funds to the office funds to reflect the depreciation on the leasehold and the leasehold improvements.  
We have transferred 1 of the 3 units that we own from designated funds to unrestricted funds on the basis that it could be sold should cashflow require it.

### Restricted funds

- (a) Nation Offices and projects Shortfall in Restricted funds in Nation Offices being funded from general reserves

### Description of funds

#### (a) Designated funds

- Office fund This represents the net book value of the leasehold and improvements to the building at 20 Great Dover Street, London, SE1 4LX

#### (b) Restricted funds

- GP Ambassador Programme A project supported by the Department of Health to improve General Practitioners' identification and support of carers
- Carers Strategy Support from the Department of Health Carers Strategy Fund for Carers UK and Carers Trust
- Islington Carers Hub Contract to provide services in Islington, funded by the London Borough of Islington
- Kensington & Chelsea Contract to provide services in Kensington & Chelsea, funded by the London Borough of Kensington & Chelsea
- Primary Care Navigator Project Contract to improve identification and support of carers within the primary care system within the boroughs of Westminster, Kensington & Chelsea and Hammersmith & Fulham
- Carers UK Volunteering Programme To establish a new, integrated country-wide social action programme to enable carers and former carers to volunteer time to support carers. Funding for England and Wales only

#### Nation offices:

- Wales Funding from the Welsh Assembly and others in support of our work in Wales
- Scotland Funding from the Scottish Parliament and others in support of our work in Scotland
- Northern Ireland Funding from the Northern Irish Assembly, Health Boards and Trusts in support of our work in Northern Ireland

#### Branches:

- West Sussex Carers Fund A legacy left for the benefit of carers in West Sussex
- Isle of Wight A legacy left for the benefit of carers in the Isle of Wight
- Carers UK Branches Funds held by branches to support their work locally. The branches were closed in this financial year and all funds held were transferred to the branch treasurers

18. Commitments	2016	2015
	£	£
The charity had annual commitments at the year end under operating leases relating to its nation and area offices expiring as follows:		
Less than 1 year	31,164	32,629
1 - 2 years	-	31,164
2 - 5 years	-	-
	31,164	63,793

## 19. Related party transactions

The charity has taken advantage of the FRS 8 exemption from disclosure of its intra group transactions

There are no related party transactions to disclose for 2016 (2015: none)

There are no donations from related parties which are outside the normal course of business and no restricted donations from related parties

20. Impact of transition to FRS 102 and SORP 2015	Unrestricted	Restricted	Total	Unrestricted	Restricted	Total
	31 March 2015			1 April 2014		
	£	£	£	£	£	£
<b>Reserves position</b>						
<b>Funds previously reported</b>	1,980,544	665,158	<b>2,645,702</b>	2,292,420	1,405,115	<b>3,697,535</b>
<b>Adjustments on transition</b>						
Holiday pay provision	(43,261)	(24,301)	<b>(67,562)</b>	(43,261)	(24,301)	<b>(67,562)</b>
<b>Funds restated on transition</b>	1,937,283	640,857	<b>2,578,140</b>	2,249,159	1,380,814	<b>3,629,973</b>

	Unrestricted	Restricted	Total
	31 March 2015		
	£	£	£
<b>Impact on income and expenditure</b>			
<b>Net (expenditure) as previously reported</b>	(311,876)	(739,957)	<b>(1,051,833)</b>
<b>Adjustments on transition</b>			
Holiday pay provision	(43,261)	(24,301)	<b>(67,562)</b>
Deferred income recognition	-	-	-
Restatement of lease costs	-	-	-
<b>Net (expenditure) as restated</b>	(355,137)	(764,258)	<b>(1,119,395)</b>

# Thank you

We would like to show our appreciation for the many people who have made our work possible this year.

Thank you to all our donors and supporters from the individuals who ran for a marathon for us to the trusts and organisations who have funded entire programmes. We couldn't do it without you!

We're grateful to all our members who have helped to create a caring community. Our members have shared their experiences, inspired our campaigning work, supported other carers and helped to raise the profile of caring throughout the UK – all in addition to their vital caring role.

The passion of our staff and trustees has ensured that carers remain at the heart of everything we do. Their experience, creativity and resourcefulness lies behind everything we have achieved.

With our partners we have been able to reach further than ever into local communities, providing events, services and products which connect carers with the support they need and help to make life better.

thank  
you

Carers UK

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