

Registered Charity Number: 1159188

York Blind & Partially Sighted Society CIO

Operating as MySight York

Independently Examined

Trustees' Report and Financial Statements

For the Year Ended 31 March 2023

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION

Charity Name

York Blind & Partially Sighted Society

Charity Number

1159188

(Linked Charity 508914 York Blind and Partially Sighted Society)

Trustees

The following Trustees have held office since 1 April 2022: -

Martin Fawcett	Chair
Jean Haywood	Resigned 18 October 2022
Eleanor Tew	
Marc Taylor	Resigned 5 September 2022
Paul Broadberry	Resigned 30 January 2023
Annette Gamston	
Barbara Capaldi	
David Gawthorpe	
Nicola Walker	Appointed 20 March 2023
John Sole	Appointed 30 January 2023, Treasurer

Chief Executive

Scott Jobson

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

CHARITY INFORMATION (Cont.)

Principal Address and Address for General Enquiries

14 Merchants Place
Merchantgate
York
YO1 9TU
Tel: 01904 636269
www.MySightYork.org

Independent Examiner

Alan Sidebottom FCA
Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9GZ

Bankers

Unity Bank plc
9 Brindley Place
Birmingham
B1 2HB

HSBC
13 Parliament Street
York
YO1 8XS

Virgin Money
Jubilee House
Newcastle-upon-Tyne
NE3 4PL

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Chairman's Report

The past few years have been particularly challenging for many organisations in the charitable sector. In response to Covid challenges we have seen many of the larger national charities restructuring their whole service offering, with some withdrawing from their premises and moving to remote working as a result of the cost and income challenges that face the sector and the whole country at the moment.

For MySight York, the situation is very similar.

The financial challenges the Charity faces continue and are exacerbated by the cost of living crisis that we are all experiencing. This will continue to mean, as we said last year, that we have to work harder for every pound we receive and continue to be as reliant on legacies as we have ever been. Our staff and volunteers remain vital to our ongoing success and achievement as much as ever.

The cost of living crisis, has impacted MySight York from at least 2 perspectives. There has been an understandable reduction in income from donations and legacies at the same time as demand for our services grows.

Just as importantly, as a responsible organisation that puts the welfare of its staff high on its agenda, we have reviewed pay and made some significant changes to contracts. We value the contribution all of our staff make enormously.

Whilst the year has been challenging, the Trustees have witnessed and supported significant change and success at MySight York:

- MySight York has made a successful bid to the National Lottery Fund for £310k over 3 years to develop awareness training based on 4 themes, commencing in April.
- Maintaining our services throughout and adapting to changing needs whilst similar organisations closed their doors.
- Reverting back to face-to-face AGM, held on 18th October 2022, and face to face Board meetings in the office.
- Our CEO, Scott Jobson is now a member of the York VCSE Assembly, connecting with the new Integrated Care Board (replacing the Clinical Commissioning Group).
- Undertaken a review of staff contracts, linking salaries to payscales ensuring equity.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Chairman's Report (Cont.)

In addition, there were a host of further commendable achievements during the year including:

- Recruiting and training new staff members.
- Continuing “Keeping in Touch” and “Home Connections” for our members.
- MySight York has been selected by Thomas Pocklington to deliver a £52k, Yorkshire wide project to support visually impaired people into employment or training.
- Recommencing the Talking Space counselling service with two volunteer counsellors.

Thanks go to CEO Scott Jobson and all the staff, who have continued to do an excellent job in challenging circumstances. Thanks must also be extended to all staff and volunteers who have endured a tough and challenging few years.

The Board of Trustees has been under review in the past year, with a significant recruitment drive undertaken to refresh the make-up of the Board and bring new skills. Through the year Jean Haywood resigned as Honorary Secretary after lengthy service, as did Marc Taylor and Paul Broadberry. However, we welcomed two new Trustees to the Board in John Sole and Nicola Walker. Outside this financial year under review (and into the next) we have also recruited two further Trustees adding to the structure and composition of the Board.

As we say every year, we pride ourselves on being a user led organisation, in touch with the needs of our members and enabling them to have a say in the running of our organisation, and a voice in service provision in York.

Our continued aim is to offer four core services:

- An Equipment and Information Centre at our premises in Merchantgate, York, providing individually tailored practical and emotional support and promoting independence and well-being.
- A Befriending Service providing 1-1 support that provides friendship, social opportunities and engagement in activities in the community.
- An Early Intervention, Information and Support Service (ECLO) at York Hospital Eye Clinic helping people with a newly diagnosed sight loss.
- A range of peer support, leisure and learning activities to increase people's

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Chairman's Report (Cont.)

confidence, well-being and independence, particularly in their local community.

Some of our forward aims will remain unchanged:

- maintain the level of core services that we currently provide, ensuring service users' needs and voice are at the heart of what we do.
- generate an increasing amount of non-statutory funding by a mixture of internal and external fundraising.
- ensure that we have the correct mix and skills from all staff and trustees and conform to the Charity Commission code.
- be responsive to a rapidly changing environment and requirement for service.

However, we must now look at doing this through a lens of sustainability. Through the past 3 years MySight York has come under considerable pressure financially and must respond accordingly, continually reviewing the services that we offer, the income that we can generate and the ongoing costs that we incur.

I would conclude by reiterating the thanks to all our staff, our volunteers, the Trustees, the National Lottery Fund, the Vale of York Clinical Commissioning Group, York Hospital Trust, the Thomas Pocklington Trust and multiple other grants and Trusts, all our generous sponsors, supporter and donors, in particular those members who have remembered us with legacies. Between them, they enable the Society to continue to provide such an excellent service.

Martin Fawcett

Martin Fawcett (Chair)

22/10/2023
..... 2023

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

The Trustees have prepared these Financial Statements 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 (FRS102) (effective 1 January 2019) as detailed in the accounting policies.

Reference and administrative details

The Charity information on pages 1 and 2 forms part of this report.

Constitution

York Blind & Partially Sighted Society (the “Charity”) was registered as a CIO on 13 November 2014, number 1159188, succeeding York Blind and Partially Sighted Society (number 508914) which is now a linked Charity. On 1 April 2015, the activity and assets of York Blind and Partially Sighted Society were transferred across to the new CIO which commenced activities on that date.

The Trustees have taken advantage of the Charity Commission concession to link charities which have a common Trustee board allowing preparation of one set of financial statements for both charities.

Our Objectives and Activities

In planning the activities of the organisation, the Trustees have due regard to their duty to meet the Charity Commission’s requirements about public benefit. The Trustees ensure that the objective and aims of the organisation are carried out through its activities for the public benefit and details its achievements and activities in this report.

The object of the Charity is:

- To promote the welfare of people who are blind, partially sighted or substantially and permanently disabled by defective vision.

The aims are:

- To provide a range of services designed to meet the needs of visually impaired people including an Equipment and Information Centre and Outreach facilities.
- To promote the needs of visually impaired people to statutory and voluntary organisations.
- To maintain an up to date record of visually impaired people, whilst ensuring compliance with the GDPR and ePrivacy regulations.
- Any other activities deemed to be desirable to further the welfare of visually impaired people.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

The Society's Mission is to "advocate, develop and provide services and facilities which enable people who are blind or partially sighted achieve independence with dignity, in all aspects of life and sectors of Society".

Our services are available to any visually impaired person in York and surrounding areas, plus his/her supporters and professional staff. Free membership of MySight York is available automatically to anyone registered blind/severely sight impaired or partially sighted/sight impaired, and to any visually impaired person in need of services.

We have almost 1,700 people (members) on our database, a significant increase in the past 3 years. Much of the increase comes from members outside of our core region, coming to us when their local services retrenched or closed over the past few years.

It should be noted that services are provided free of charge generally. As our member/user base increases, there is an added burden around cost, which we need to fund.

We receive no Government funding and we are enormously reliant on our own fundraising activities, in a market which is becoming ever more competitive to secure funding. Legacies and donations are vitally important to ensure continued sustainability of MySight York and as we have seen over the past 3 years, when these are not as frequent or substantial, we can face difficulties. It will vitally important that we can continue to raise our profile to meet these objectives.

A continued focus of both staff and Trustees will be on how we continue to provide the services in an efficient manner; how we can control our costs and optimise our income streams and where best to do this from.

Achievements and Performance

1. Achievements

2022/23 was a significant year for our charity as we continued to expand our reach and enhance our services. Despite the seemingly never-ending list of challenges, we remained committed to supporting our members and adapting our operations to ensure we deliver what our members need and want.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

The demand for our services continued to rise, whilst the ability to attend and engage was made easier.

However, funding remained a constant concern, which focused our priorities.

During the year we were successful in our application to The National Lottery Reaching Communities Fund. The funding is over three years and will support the Community Connect Project. One of the main ambitions is to build a city where people with sight loss can be active and involved in their community, by forging new and lasting collaborations in areas including:

- Sports, health and wellbeing;
- Arts, crafts and humanities;
- Accessing information and communication technology; and
- Children and young people's activities

Next year will see us deliver on this project as well as the new Employment Support Project. Visually impaired people often face barriers when seeking employment. However, with the support of a specialist adviser, people with sight loss (across Yorkshire) can access a wider range of employment opportunities. We are now able to assist with job training, CV writing, linking with training providers, action plans and support sessions, job applications and interviews practice.

2. Performance

Equipment and Information Centre

Our equipment and information service plays a crucial role in facilitating accessibility, inclusion, and empowerment; via our second professionally qualified and experienced Eye Care Liaison Officer. By providing assistive technology, educational support, communication tools, and resources, it enables visually impaired people to overcome barriers, enhance independence, and participate more fully in various aspects of life, throughout their sight loss journey.

"I think you provide a unique service here...in the way that MySight York offers services."

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

"I really appreciate the reading lamp and the two magnifiers. The folder of reading material is very interesting and helpful too. It was really good to meet you and I am very pleased with the aids you provided me with."

"Thank you for transforming the way I manage. It is wonderful the difference I have experienced."

The equipment and information service provides numerous benefits and support to enhance the daily lives of those living with sight loss.

By providing Access to Assistive Technology, such as screen readers, magnifiers, audio books, braille displays, screen readers, tactile products (among others) visually impaired people are able to achieve a greater independence and quality of life. Indeed, by utilising these tools, people living with sight loss can access information, communicate, navigate their surroundings, and perform daily living tasks, more effectively; enabling them to stay connected with friends, family, and the broader community.

There were over 2,000 visits to the Equipment and Information centre with:

- 875 - Number of unique beneficiaries supported through E&I
- 114 – Number of items sent/delivered to door via the continuing Home Connections offer.

ECLO (Eye Clinic Liaison Officer) York Hospital Trust

MySight York continues to lead the work based in York Hospital's Eye Clinic via our professional ECLO who provided support and assistance to individuals with sight loss or visual impairments. Our ECLO plays a crucial role in helping patients navigate the healthcare system, understand their eye conditions, and access appropriate services and support.

This role is more important than ever before with the number of people needing the service continuing to grow.

"Thank you, this has been brilliant. It is the first time anyone has talked to me about how I am feeling and the emotional impact. Just giving me time to think about my sight and being able to articulate how it affects me has been so helpful."

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

“The whole appointment has been very informative; we are new to this and were hoping you could give us some information which you have.”

“Thank you Helen for taking the time to listen to me today, you have been really helpful following that (issue with letters in an accessible format) up for me today. I am really pleased that you took the time to follow things up for me.”

“Dear Helen, My grateful thanks for safe and swift receipt of the copy of my letter. I have not seen this letter before now and would certainly have responded much earlier if I had. Many thanks to you for all your rapid help in tracking down this little mystery and to Deb at MySight York for her introduction. Your help will help me to catch up with some of the 12 months lost time.”

- 566 - Individual patients supported
- 1,500 - Contacts
- 174 - CVI registrations
- 668 - Referrals to organisations

Befriending Service

Our befriending services (telephone and face to face) continued to provide a crucial support system that enhances social connections, emotional well-being, and overall quality of life. They play a significant role in fostering inclusivity, promoting independence, and empowering people with visual impairments to lead connected lives.

We invested in new software that enhanced our offer making befriending calls easier, safer and more accessible for people with sight loss and the volunteers who support it.

“I really enjoy my chats with my volunteer. I look forward to each one.”

“I think the calls fulfil a need for (my client) to express herself and know that she is being heard but not judged. I am sometimes able to offer reassurance or give a different perspective. She would prefer not to be reliant on kind neighbours.”

“Having regular structured phone calls/quizzes helped to keep me focused. The last two years have gone by in a blur and there were weeks in a row when I had no idea what day of the week it was or when anything was going to change. Having these calls helped to keep me grounded and to focus on others rather than just myself and my own situation.”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

- 44 - clients receiving regular contact via the befriending service
- 1,172 - hours of befriending telephone calls
- 814 - calls made
- 346 - number of home visits
- 32 - number of dedicated volunteers

Groups and Activities

Peer support groups, training sessions, workshops, and social events foster a sense of community, offer a platform for sharing experiences, and provide emotional support for people living with sight loss.

- 1,590 – number of attendances at group sessions
- 287 – number of groups
- 443 – number of clients attended

Groups include:

- Exercise class
- Audio book group
- Discussion group
- Technology support group
- 121 Tech support
- Access group
- A support group for people who experience visual hallucinations
- Quiz group
- Piano tuition
- Support with MySight (*3 groups)
- Boccia
- Tennis
- Board Games
- Knit and Natter
- Chair exercise
- Walking group
- One-off event groups

“MySight York organised an activity yesterday, it was a trip to Heslington Hall. I have never felt so relaxed as I did for such a long time. Everyone was so caring and friendly, we had a truly wonderful time. We went on the bus with Vicky and came back by bus, it was in line with York University.”

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

“You have been my lifeline to books.”

“Can I say how much I enjoyed the discussion group today...it was great.”

“So helpful, nothing is too much trouble. Esme’s Room was so supportive.”

Communications

Our newsletter continues to be our number one platform to provide accessible and relevant information. It keeps members informed, connected, and engaged.

We have continued to grow our online presence – we have over 1,800 followers on Facebook and Twitter (combined). However, we have now added LinkedIn to our social media reach, adding an additional 276 followers (businesses, organisations and individuals).

Our quarterly Newsletter is distributed to over 1,600 people in an accessible format, to clients, volunteers and organisations.

- 1048 clients – large print
- 197 clients – email (screen reader accessible)
- 55 clients – CD
- 44 clients – MP3 format
- 5 clients – Braille

We regularly receive wholly positive feedback:

“Your newsletter is so helpful, so informative. I return to it again and again. I came in after reading, and knew you’d have something to help me.”

“Amazing, informative newsletter. Thanks to everyone.”

“Just wanted to call to say how much I enjoyed the newsletter, it was really interesting and full of helpful information.”

Transcription Service

We continued to provide a transcription service principally used by York and Scarborough NHS Trust, to ensure patients within the trust receive information in their chosen format, thus meeting the accessible health standard.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

We also assisted local businesses and educational establishments to create accessible documents, such as Braille, audio or large print materials.

Talking Space (Counselling)

We were delighted to recommence this service following the impact of Covid. This specialist Counselling Service (Talking Space) proved to be extremely beneficial for people with sight loss, providing emotional support, coping strategies, and a safe space to express their feelings and concerns. Our aim is to continue to grow the service to meet the rising demand from our membership.

Fundraising and Income Generation

We continue to be reliant on donations from individuals and trusts to enable us to continue to provide services. Fundraising is crucial to our ability to deliver essential services, raise awareness, offer support, connect and build communities, and empower people with visual impairments.

Last year has again presented ongoing challenges for fundraising (with trusts and grants returning less than forecast) however 2023/24 will likely see a return to typical levels as trusts recover their Covid overspend.

The support of donors, trusts and the lottery however, will again be crucial in the next 12 months.

We are extremely grateful to all our funders, supporters and donors who value our work and the impact we have on the lives of people living with sight loss.

Financial Review

The Society sets an annual budget that is approved by the Trustees prior to the start of the financial year. Our full year income of £285,314 was exceeded in this financial year by our expenditure of £385,083. This produced a final result delivering a £99,769 deficit.

Our income and expenditure can be summarised:

- Income was largely consistent with the previous year across legacies, donations and other activities.
- Costs increased in the year to £385k from £326k in 2021/22.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

Our recent levels of income can be further analysed as follows:

	2022/23	2021/22
Local authority / CCG funding	25,832	24,975
Donations, trusts, community fundraising	106,773	117,205
Legacies	70,043	34,196
Equipment sales	10,853	11,937
Lottery projects	46,000	98,701
TPT projects	24,787	-
Other	1,026	689
Total	285,314	287,703

The reduction in community fundraising and other income during 2022/23 continued to reflect the impact of Covid-19, which extended through significant periods of the financial year.

Legacy funding has continued to enable the Society to deliver the services its users value so highly and our thanks go to members' estates for their continued support.

Reserves policy and going concern

Free reserves of £34k were held at 31 March 2023. Free reserves exclude those reserves which are restricted, designated, or which can only be realised by disposing of fixed assets held for Charity use.

The Building Fund of £65k is a designated fund, which is set aside to ensure the organisation has, and will have in future, appropriate premises from which to operate (see note 8).

The policy of the Executive Committee is that the Society should retain free reserves covering 3 to 4 months' operating expenditure.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

Key Management Remuneration

The pay policy of staff is based on the NJC scales with progression where appropriate. Annual increases are normally in line with the national agreement and subject to affordability at the time. New staff salaries are approved by the Executive Committee and are considered after external benchmarking of the post.

Structure, Governance and Management

We pride ourselves on being a user led organisation, admitting as members anyone who is registered blind or partially sighted living with sight loss and in need of services.

The Charity is managed by an Executive Committee (Board of Trustees) of at least 8, but no more than 15 members. In accordance with the constitution, every effort is made to ensure that many Trustees are visually impaired people. All Trustees are required to retire at the Charity's annual general meeting but can offer themselves for re-election. New Trustees are either elected at the Annual General Meeting or co-opted by the board for the period to the next Annual General Meeting. New Trustees participate in induction training and an annual programme of Trustee training is organised by the Honorary Secretary and staff.

The Executive Committee meets bi-monthly, with additional meetings as and when required. A between meeting report is issued to Trustees by the Chief Executive. Day to day management of the organisation is delegated to the Chief Executive.

Plans

YBPSS Business Plan sets the future strategy of the organisation, based on Best Practice guidance nationally and local needs. The Trustees thereby wish to:

- deliver the activities identified in our Business Plan;
- continue to provide, develop and enhance the current range of core services and activities;
- consolidate and further develop fundraising activities so we will not be reliant on legacies;
- improve training and development of staff, trustees and volunteers.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023 (Cont)

STAFF

The Society and the excellent services it provides at the various locations can continue only because of its staff who support all our members throughout all our activities. Once again, our thanks to them all for their contribution over the past year, which has again been challenging. I therefore wish to thank personally all current staff and those who contributed during the year.

Current staff

Scott Jobson	Chief Executive
Barbara Fairs	Deputy Chief Executive
Deborah Wheller	Sight Support Service Manager
Catherine Bamford	Volunteer Manager
Jenny Allott	Fundraiser – Trusts and Grants
Helen Flett	Eye Clinic Liaison Officer
Carol Etherington	Volunteer & Befriending Assistant
Vicky Smith	Community Involvement Officer
Louise Railton	Community Fundraiser
Dom Tooze	Employment Adviser
Jade Puckering	Intern

This report was approved by the Trustees on ^{22/10/2023}..... and signed on its behalf by:

Martin Fawcett
.....
M Fawcett (Chair)

John Sole
.....
J Sole (Treasurer)

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF TRUSTEES' RESPONSIBILITIES

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

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

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

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

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

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED

I report to the Trustees on my examination of the accounts of the York Blind & Partially Sighted Society for the year ended 31 March 2023.

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

Responsibilities and basis of report

As the Charity Trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF YORK BLIND & PARTIALLY SIGHTED (Cont)

Independent Examiner's Statement (Cont)

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Alan Sidebottom

24/10/2023

.....

Alan Sidebottom FCA

Azets Audit Services Limited
Triune Court
Monks Cross Drive
York
YO32 9G

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2023

	Note	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2023 Total £	2022 Total £
Income from:						
Donations, grants and legacies	2	143,632	-	82,927	226,559	232,342
Other trading activities	2	8,832	-	-	8,832	6,618
Investment income	2	227	-	-	227	89
Income from charitable activities	2	12,534	-	37,162	49,696	48,654
Total income		165,225	-	120,089	285,314	287,703
Expenditure on:						
Expenditure on raising funds	3	4,251	-	-	4,251	14,286
Expenditure on charitable activities	3	267,821	-	113,011	380,832	311,961
Total expenditure		272,072	-	113,011	385,083	326,247
Net income/(expenditure) for year		(106,847)	-	7,078	(99,769)	(38,544)
Transfers between funds		100,000	(100,000)	-	-	-
Net Movement in funds		(6,847)	(100,000)	7,078	(99,769)	(38,544)
Balances at 1 April 2022		40,952	165,000	47,271	253,223	291,767
Balances at 31 March 2023	10	34,105	65,000	54,349	153,454	253,223

The notes on pages 22 to 38 form part of these financial statements. All of the Charity's operations are classed as continuing.

A fully detailed Statement of Financial Activities for the year ended 31 March 2022 is shown at note 13.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO
BALANCE SHEET AS AT 31 MARCH 2023

	Note	2023 £	2022 £
CURRENT ASSETS			
Stock		9,456	6,316
Debtors	6	46,360	31,818
Cash in bank and in hand		131,309	246,731
		187,125	284,865
LIABILITIES: Amounts falling due within one year			
Creditors and accruals	7	(33,671)	(31,642)
NET CURRENT ASSETS		153,454	253,223
TOTAL ASSETS LESS CURRENT LIABILITIES	10	153,454	253,223
REPRESENTED BY:			
FUNDS			
Unrestricted	8	34,105	40,952
Designated – building fund	8	65,000	165,000
Restricted	9	54,349	47,271
	10	153,454	253,223

The financial statements were approved by the Trustees on 22/10/2023 and signed on its behalf by:

Martin Fawcett

.....
M Fawcett - Chairman

John Sole

.....
J Sole - Treasurer

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

Charity Information

York Blind & Partially Sighted Society is registered as a Charitable Incorporated Organisation under the Charities Act 2011. The address for general enquiries is York Blind and Partially Sighted Society, 14 Merchants Place, Merchantgate, York, YO1 9TU.

Accounting Convention

The financial statements have been prepared on a going concern basis 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 (FRS102) (effective 1 January 2019) ("Charities SORP (FRS102)"), the Financial Reporting Standard applicable in the UK and Ireland ("FRS 102"), and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair' view. This departure has involved following Charities SORP (FRS 102) rather than Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

The financial statements are prepared in sterling which is the functional currency of the charity.

York Blind & Partially Sighted Society meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at cost or transaction value unless otherwise stated in the relevant accounting policy notes.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont)

Going Concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the company has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

Income

Income is recognised in full in the Statement of Financial Activities ("SoFA") in the year in which it is receivable. For subscriptions and rental income this is in the year in which it is receivable and for ticket sales and meeting suppers this is in the year in which the event occurs. Deferred income represents grants received specifically for future accounting periods.

Expenditure

Expenditure is included in the SoFA on an accrual's basis inclusive of any VAT that cannot be recovered and has been classified under headings that aggregate all costs related to the category.

All direct costs have been allocated across the functional categories of resources expended in the SoFA. Where costs cannot be directly attributed to headings, they have been apportioned on a basis consistent with the use of the resources.

The costs of generating funds relate to expenditure directly attributable to fundraising.

Costs of charitable activities include those costs incurred by the Charity in the delivery of its activities and services. Costs relating to an activity are allocated directly.

Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources.

Pensions

The Charity operates a defined contribution scheme for employees. Contributions are charged as an expense to the SoFA in the period in which they fall due.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont.)

Staff costs

The costs of short-term employee benefits are recognised as a liability and an expense where settlement of obligations does not fall within the same period.

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Operating lease agreements

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lessor are charged against income on a straight-line basis over the period of the lease.

Stock

Stock is valued at the lower of cost and net realisable value.

Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

The Charity has only financial assets and liabilities of a kind that qualify as basic financial instruments in accordance with section 11 of FRS 102. Basic financial instruments are initially recognised at transaction value and are subsequently measured at their settlement value.

Cash at bank and in hand

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity held for working capital.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont)

Debtors

Other debtors are recognised at the settlement amount due. Prepayments are valued at the amount prepaid.

Financial assets, other than those held at fair value through profit and loss, are assessed for indicators of impairment at each reporting end date.

Financial assets are impaired where there is objective evidence that, as a result of one or more events that occurred after the initial recognition of the financial asset, the estimated future cash flows have been affected. The impairment loss is recognised in the income and expenditure account.

Creditors, loans and provisions

Creditors, loans 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, loans and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Financial liabilities

Financial liabilities are only derecognised when, and only when, the Charity's obligations are discharged, cancelled or they expire.

Amounts recognised as provisions are best estimates of the consideration required to settle the present obligation at the reporting end date, taking into account the risks and uncertainties surrounding the obligation.

Fund accounting

Unrestricted funds are funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity.

Designated funds are funds set aside by the Trustees out of unrestricted general funds for specific future purposes.

Restricted funds are funds which can be used only for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

1. Accounting Policies (Cont)

Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

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

The Trustees are of the opinion that there are no estimates and assumptions which have a material impact on the carrying amounts of assets and liabilities.

Legacies

Legacies are recognised as income when probate has been granted, the charity has established its entitlement to the funds and where sufficient information is available to allow it to measure its entitlement.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME

As at 31 March 2023	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	12,140	12,140
Lottery Project	-	25,300	25,300
Postcode Lottery	-	20,700	20,700
TPT Project	-	24,787	24,787
Grant support	-	82,927	82,927
Donations	73,589	-	73,589
Legacies	70,043	-	70,043
Donations and legacies	143,632	-	143,632
Total donations, grants and legacies	143,632	82,927	226,559

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME (Cont.)

As at 31 March 2023 Continued	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Other trading activities:			
Community fundraising	3,138	-	3,138
Income from work	5,694	-	5,694
Total trading activities	8,832	-	8,832
Investment income			
Bank interest	227	-	227
Income from charitable activities:			
Hospital Eye Clinic Service			
Vale of York CCG	-	11,330	11,330
York Hospital	-	25,832	25,832
Sales of equipment and aids	10,853	-	10,853
Social and group activities	882	-	882
Sundry income	799	-	799
Total income from charitable activities	12,534	37,162	49,696
Total income	165,225	120,089	285,314

During the year donations of £1,644 (2022: £600) were received from Trustees of the Society.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME (Cont.)

As at 31 March 2022	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Grants			
Vale of York Clinical Commissioning Group:			
Equipment and Information Centre	-	11,937	11,937
Lottery Project	-	98,701	98,701
Other	600	-	600
Grant support	600	110,638	111,238
Donations and gift aid	86,908	-	86,908
Legacies	34,196	-	34,196
Donations and legacies	121,104	-	121,104
Total donations, grants and legacies	121,704	110,638	232,342
Other trading activities:			
Community fundraising	2,518	-	2,518
Income from work	1,600	2,500	4,100
Total trading activities	4,118	2,500	6,618
Investment income			
Bank interest	89	-	89

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED MARCH 2023

2. INCOME (Cont)

	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Income from charitable activities:			
Vale of York CCG	-	11,141	11,141
York Hospital	-	24,975	24,975
Sales of equipment and aids	12,256	-	12,256
Social and group activities	132	-	132
Sundry income	150	-	150
Total income from charitable activities	12,538	36,116	48,654
Total income	138,449	149,254	287,703

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

3. EXPENDITURE

As at 31 March 2023	Unrestricted Funds	Restricted Funds	2023 Total Funds
	£	£	£
Other	4,251	-	4,251
Total expenditure on raising funds	4,251	-	4,251
Expenditure on charitable activities			
Salaries (Note 4)	155,274	63,092	218,366
Rent, rates and service charges	58,700	-	58,700
Cost of equipment sold	6,738	-	6,738
Professional fees	11,061	-	11,061
Independent Examination	2,200	-	2,200
Lottery funding - overheads	-	27,292	27,292
Printed material	-	403	403
Lottery funding - equipment	-	6,074	6,074
Staff IT	3,975	-	3,975
Insurance	1,520	-	1,520
Consultancy	1,540	872	2,412
Maintenance	1,930	-	1,930
Stationery and photocopying	1,021	33	1,054
Sundry expenses	1,966	-	1,966
Postage	1,299	5	1,304
Bank charges	914	-	914
Newsletter	2,831	-	2,831
Phone	2,707	-	2,707
All aboard planning	462	-	462
Social activities	182	-	182
TPT funding - overheads	-	11,420	11,420
Other costs	13,501	3,820	17,321
Total expenditure on charitable activities	267,821	113,011	380,832
Total expenditure	272,072	113,011	385,083

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

3. EXPENDITURE (Cont.)

As at 31 March 2022	Unrestricted Funds	Restricted Funds	2022 Total Funds
	£	£	£
Salaries (Note 4)	13,225	-	13,225
Other	1,061	-	1,061
Total expenditure on raising funds	14,286	-	14,286

Expenditure on charitable activities

Salaries (Note 4)	83,444	119,953	203,397
Rent, rates and service charges	45,845	-	45,845
Cost of equipment sold	11,446	-	11,446
Professional fees	5,724	-	5,724
Independent Examination	2,000	-	2,000
Outreach premises	-	6,000	6,000
Lottery funding: overheads	4,511	666	5,177
Printed material	-	1,109	1,109
Lottery funding: equipment	-	473	473
Staff It	1,442	-	1,442
Insurance	1,445	-	1,445
Consultancy	1,479	-	1,479
Maintenance	4,729	-	4,729
Stationery and photocopying	1,160	-	1,160
Sundry expenses	1,120	-	1,120
Postage	990	-	990
CRMS	-	972	972
Bank charges	928	-	928
Newsletter	3,896	-	3,896
Phone	1,093	-	1,093
All aboard planning	3,018	-	3,018
Independent Examination	2,000	-	2,000
Other costs	4,488	2,030	6,518
Total expenditure on charitable activities	180,758	131,203	311,961

Total expenditure	195,044	131,203	326,247
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YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

4. STAFF COSTS

	2023 £	2022 £
Total staff costs comprise:		
Gross salaries	197,969	199,384
Employer's national insurance	13,915	11,576
Pension contributions	6,482	5,662
	218,366	216,622

Average number of employees	9.7	9.3
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No employee received remuneration more than £60,000 in either year.

Key management personnel comprise 1 individual (2022: 1 individual) whose aggregate remuneration and benefits totalled £46,216 (2022: £43,770).

5. TRUSTEES AND RELATED PARTY TRANSACTIONS

No Trustee or any person connected with him or her received any remuneration, expenses or benefits during the year (2022: no Trustee).

No Trustee, or anyone connected with a Trustee, has a material interest in any of the Charity's transactions.

6. DEBTORS

	2023 £	2022 £
Trade debtors	1,622	150
Other debtors	44,738	31,668
	46,360	31,818

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

7. CREDITORS

	2023 £	2022 £
Trade creditors	8,023	4,891
Other creditors	25,648	26,751
	33,671	31,642

8. UNRESTRICTED FUNDS

As at 31 March 2023	Balance 1 April 2022 £	Income £	Expenditure £	Transfer £	Balance 31 March 2023 £
Unrestricted funds					
General funds	40,952	165,225	(272,072)	100,000	34,105
Designated funds					
Building fund	165,000	-	-	(100,000)	65,000
	205,952	165,225	(272,072)	-	99,105

As at 31 March 2022	Balance 1 April 2021 £	Income £	Expenditure £	Transfer £	Balance 31 March 2022 £
Unrestricted funds					
General funds	97,547	138,449	(195,044)	-	40,952
Designated funds					
Building fund	165,000	-	-		165,000
	262,547	138,449	(195,044)	-	205,952

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

8. UNRESTRICTED FUNDS (Cont)

Designated Building Fund

The purpose of the Building Fund is to enable the Charity to acquire its own premises at some time in the future. The Trustees are aware of their liability in terms of the current and any future lease and feel it prudent that the Building Fund remains as a separate item.

9. RESTRICTED FUNDS

As at 31 March 2023

	Balances 1 April 2022 £	Income £	Expenditure £	Transfer £	Balances 31 March 2023 £
Eye Clinic Services	40,900	49,302	(25,871)	-	64,331
Lottery Fund	6,371	46,000	(65,353)	-	(12,982)
TPT Fund	-	24,787	(21,787)	-	3,000
Total	47,271	120,089	(113,11)	-	54,349

Eye Clinic Information and Support Services

These services provide practical and emotional support to patients with a diagnosis of permanent sight loss. They operate from within the Eye Clinic Outpatients Department at York and Scarborough Hospitals and other locations commutable from York. The staff members (Eye Clinic Liaison Officers) also work with Hospital staff on issues of service delivery for blind and partially sighted patients.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

9. RESTRICTED FUNDS (Cont)

Lottery & Postcode Lottery Fund

The Fund was originally conceived to support our members to access activities in their own communities, however, the pandemic meant this became impossible to facilitate. The Fund kindly agreed to divert the funding to the Keeping in Touch project and online activity groups, to ensure visually impaired people were supported and had regular telephone contact, and were still able to engage socially despite the lockdowns and social distancing made necessary by Covid-19.

TPT Fund

The Thomas Pocklington Trust Fund was conceived to provide funding for a visually impaired intern, a children's project, and an employment advisor.

As at 31 March 2022

	Balances 1 April 2021 £	Income £	Expenditure £	Transfer £	Balances 31 March 2022 £
Eye Clinic Services	25,731	50,553	(35,384)	-	40,900
Lottery Fund	3,489	98,701	(95,819)	-	6,371
Total	29,220	149,254	(131,203)	-	47,271

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

10. ANALYSIS OF NET ASSETS BETWEEN FUNDS

As at 31 March 2023	Restricted Funds	Designated Funds	Unrestricted Funds	2023 Total Funds
	£	£	£	£
Current assets	54,349	65,000	67,776	187,125
Current liabilities	-	-	(33,671)	(33,671)
	54,349	65,000	34,105	153,454

As at 31 March 2022	Restricted Funds	Designated Funds	Unrestricted Funds	2022 Total Funds
	£	£	£	£
Current assets	47,271	165,000	72,594	284,865
Current liabilities	-	-	(31,642)	(31,642)
	47,271	165,000	40,952	253,223

11. LEASE COMMITMENTS

Total commitments under non-cancellable operating leases are as follows:

	Land and buildings	
	2023	2022
	£	£
Due within one year	49,875	49,875
Due between two and five years	228,000	228,000
Due over five years	78,375	128,250
	356,250	406,125

12. CONTINGENT ASSETS

At 31 March 2023, the charity had been notified of its entitlement to 0 (2022: 1) residuary legacies with Probate granted. The charity received further information within the financial year in relation to an unpaid legacy, therefore a provision has been introduced to reflect this.

YORK BLIND & PARTIALLY SIGHTED SOCIETY CIO

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2023

13. STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2022

	Unrestricted Funds £	Designated Funds £	Restricted Funds £	2022 Total £
Income from:				
Donations and legacies	121,704	-	110,638	232,342
Other trading activities	4,118	-	2,500	6,618
Investment income	89	-	-	89
Income from charitable activities	12,538	-	36,116	48,654
Total income	138,449	-	149,254	287,703
Expenditure on:				
Expenditure on raising funds	14,286	-	-	14,286
Expenditure on charitable activities	180,758	-	131,203	311,961
Total expenditure	195,044	-	131,203	326,247
Net Movement for year	(56,595)	-	18,051	(38,544)
Balances at 1 April 2021	97,547	165,000	29,220	291,767
Balances At 31 March 2022	40,952	165,000	47,271	253,223