

Making life better for carers

Annual
Report
2013-14

Financial
Statements
2013-14



Welcome



Across the UK today 6.5 million people are carers, supporting a loved one who is older, disabled or seriously ill.

That's 1 in 8 adults who care, unpaid, for family and friends. By 2037 there will be 9 million carers.

Our loved ones are living longer with illness or disability, and more and more of us are looking after them.

Whether round-the-clock or for a few hours a week, in our own home or for someone at the other end of a motorway – caring can have a huge effect on us, our lives and our plans.

Caring is such an important part of life. It's simply part of being human. Carers are holding families together, enabling loved ones to get the most out of life, making an enormous contribution to society and saving the economy billions of pounds.

Yet many of us are stretched to the limit – juggling care with work and family life, or even struggling with poor health ourselves. We often find it difficult to make ends meet if we're unable to work or if we've reduced our working hours to care.

Every day 6,000 people become carers. Many don't know how or where to get help. It can be frightening and very lonely.

For some it's sudden: someone you love is taken ill or has an accident, your child is born with a disability.

For others, caring creeps up unnoticed: your parents can't manage on their own any longer, your partner's health gets gradually worse.

Looking after someone can be tough, but you're not on your own. 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.

We're here to make life better for carers.



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Every day
6,000 people
become
carers



Within our
lifetime there
will be **9 million**
carers



As an organisation of carers, what unifies Carers UK is the straightforward belief that life needs to be better for carers, and that together we can achieve our vision of a society which respects, values and supports everyone who cares.

When we look back at the steps we've taken over the past year, we're paying tribute to everyone who's joined us in our mission to make life better for carers. We simply couldn't do it without you.

With carers' voices at its heart, our Caring and Family Finances Inquiry examined the impact of an unprecedented combination of rising living costs and far-reaching changes to social security and cuts to services. The Inquiry gives us the evidence required to influence policy reforming the financial support available to carers.

In our carers' campaign, *We Care. Don't You?*, we've distilled three clear calls to action from the Inquiry. With a General Election around the corner, we are showing the UK Government that they cannot ignore carers.

As well as calling for widespread reforms, we've also expanded our own advice and support services so carers can get help and information when it's needed most. Our Adviceline is now open five days a week. As well as providing expert advice, we also run a new listening support service delivered by trained volunteers who know exactly what looking after someone can feel like.

Over the past year volunteers have helped us to connect with more carers locally. We now have 60 (and counting) volunteer ambassadors reaching out to carers in their communities or working with GP surgeries. We've also been immensely grateful to those who've volunteered in our online forum community and in local groups, using their caring experience to support other carers.

Some individuals in our branch network have been tirelessly supporting carers for decades. Their dedication has made us the organisation we are today.

The launch of our first app, Jointly, demonstrates our intention to find new ways to reach and support carers,

and, in doing so, to generate income from products and services.

At the same time, our refreshed brand and increased fundraising capacity is helping us make a compelling and powerful case for charitable support. We are enormously grateful to everyone who's raised money for us and we'd particularly like to thank all the carers who've told their story, welcomed a photographer, starred in a film, or taken part in research to help us raise awareness of caring as a pressing social issue.

In particular, we would like to thank Don Brereton, who was Carers UK's Chairman until December 2013. Don made a huge contribution in his eight years as Chairman, and in his role as Vice President, continues to use his skills and influence to make life better for carers.

As well as looking at the past year, this report also sets out ambitious plans for next year, building momentum as we approach our 50th anniversary in 2015. As we look ahead, we can clearly see both how far we've come as a movement of carers, and how far we still have to go.

With your support, we'll get there.



David Grayson,
Chairman

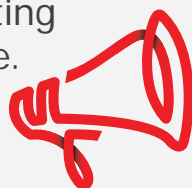


Heléna Herklots,
Chief Executive



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.





Annual
Report
2013-14

Our priorities & values

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 >> *p13*
- 3** Increase and improve our engagement with carers, including through partnerships >> *p16*
- 4** Increase our income and improve our long term financial position >> *p20*
- 5** Improve our systems, support our staff and demonstrate quality in all that we do >> *p21*



Values

Carers are at the heart of everything that we do.

We are:

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

open and approachable





**committed
to working
with others**



**independent
and tenacious
in advocating
for carers**

carers**UK**

07



**inclusive,
respecting the
diversity of each
other's caring
experience**



**expert and
innovative**

The year by numbers



We help

739,000
people accessed
specialist
information on
our website



On average **1,767** carers contacted our Adviceline each month, whether by phone, email or social media

We distributed information leaflets through **1,600** Lloydspharmacy stores promoting our help and support for carers

Nearly **3,000** Adviceline calls have been responded to by volunteers who draw on their own experiences of caring to provide support to others



No one ever thinks it can happen to you, but it always can, and without the support of Carers UK I just wouldn't have had a clue what help I was entitled to at this difficult time in my life. It's not a lot, but it means we get by, and makes a hard situation less of a strain.

After my mother died I wanted to do something to help people who were in a similar position. Now I support people who call the Adviceline by listening to them talk about their situation. I am constantly overwhelmed by what a tough job people have to deal with day in and day out, but also by how generous and giving people are.

” Joanie (pictured above)

We campaign



200 carers participated in evidence sessions for our Caring and Family Finances Inquiry.

75 carers told their stories to the media in order to raise awareness and call for change.

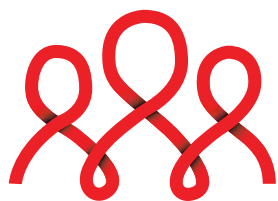


It's so important to know there is an organisation out there which is campaigning for you and your family and understands your situation. Carers UK make me feel visible. They have raised the profile of carers. You feel you have some recognition of this role which is quite an invisible role to the majority. Now I say I'm a carer and I'm proud to do that.

” Brigid (right)

3,000 carers
gave us their view
in our State of
Caring survey





We connect

2,600 local events held during our major awareness campaigns



4,221 new members joined Carers UK, becoming part of a supportive community and a movement for change

We grew our Local Ambassadors and GP Ambassadors programmes, and now have a team of **60** reaching out to carers and improving local support



The Carers UK online forum is a lifeline. It's very reassuring to know that other people feel the same and it makes you feel that you are a normal person and that you're not alone.



Margaret (right)



We innovate

1 app launched. Jointly is designed to make it more straightforward to co-ordinate care with others.



974 professionals attended our training courses on topics such as community care law and carer's assessments

We provided consultancy to local authorities and health bodies to improve the support available to **77,000** carers



1
app
launched

Campaigning together for lasting change

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

Last year we said that we would:

- Complete Caring & Family Finances Inquiry
- Influence the development and implementation of changes in health and care

What we did:



State of Caring

At our State of Caring Conference in May 2013 we presented the results of a detailed survey of over 3,000 carers from across the UK who took the time to share their experiences, views and concerns, to an audience of 170 professionals. The research gives a definitive picture of the state of caring in the UK today, and by taking this snapshot every year we are able to track what is happening in carers' lives.

In the report, carers set five challenges to inform the services we will provide and the campaigns we will run:

1. Ensure better access to support and information
2. Deliver services and workplaces that support carers to juggle work and care
3. Act urgently to prevent carers' financial hardship
4. Ensure carers are able to achieve the best health outcomes possible
5. Deliver high quality care and improve the interface between health and social care services

Care Act

For much of the year, the Care Bill, which affects the rights of adult carers in England, has been making its way through Parliament, finally becoming law in May 2014. At every stage we have been working, with our partners in other carers' organisations, to make sure that carers' voices are heard. As a result of this, the Act strengthens the rights and recognition of carers in the social care system, including, for the first time giving carers a clear right to receive services. These are by far the strongest rights for carers yet.

In particular, we identified that parents of disabled children were not included in many of the new rights which other carers would receive. We led a long and hard-fought campaign with our partners and carers, which resulted in parent carers receiving historic new rights.



Caring & Family Finances Inquiry

In February 2014 we launched the report from our Caring & Family Finance Inquiry. With carers' voices at its heart, the Inquiry is a definitive study of the financial impact of caring, a full assessment of the impact of the Government's benefit changes on carers and their families, and a basis for future policy.

Over 200 carers attended evidence sessions throughout the UK, nearly 4,000 completed our survey, and others worked intensively with us to develop diaries and share personal stories. As a result of what carers told us, we launched the carers' campaign *We Care. Don't You?* to shape the Inquiry's insights into three clear calls to action for Government:

- **Stop cutting carers' support**
Carers need more help, not less – yet our families face cuts to vital care services and benefits.
- **End carers' financial hardship**
Caring shouldn't push families into financial crisis – we need urgent reform of carers' benefits.
- **Prevent carer breakdown**
Health and care services must act to prevent carer ill-health and isolation.



Carers Parliament

Carers Scotland organised the second Carers' Parliament in November with representatives of carers from almost every constituency in the country.

It was attended by the First Minister, Alex Salmond MSP, who announced plans to bring about specific legislation that will promote, defend and extend the rights of carers.

What we will do in 2014/15:

- Work to ensure that carers' voices are heard when the UK Government is framing the details of how the Care Act is implemented
- Produce a Carers Manifesto to set out carers' needs ahead of the General Election
- Grow the *We Care. Don't You?* campaign to ensure carers' messages get through to Government
- Influence all political parties to commit to policies which support carers and advance carers' rights

Case study

Darren and Lesley's story

Our Caring and Family Finances Inquiry was powered by carers' experiences and resolve - not only to win a better deal for their families, but for families who will care in the future.

Darren and Lesley were among the carers who told their story to illustrate just how urgently reforms are needed.



Even every day family functions are hugely stressful and exhausting

Lesley and Darren have four daughters – Gabrielle, 19, Olivia, 17, Fleur, 10 and Amélie, 9 who has CHARGE syndrome, a rare condition resulting in multiple and profound disabilities. Amélie has no hearing or speech, is partially sighted, and suffers chronic lung disease, which means the home has to be heated 24 hours a day for at least seven months a year.

The costs of care associated with Amélie's health are high. Keeping the house heated, running oxygen cylinders and medical equipment day and night, high water usage that results from extra bathing, clothing, bedding and washing that come with being tube-fed and incontinence have resulted in massive debts for the family.

When Lesley became pregnant with Amélie both she and Darren were in full-time employment earning a joint income of over £50,000 a year. Lesley was working as a dental practice manager and Darren was a railway engineer.

Shortly after Amélie was born Darren was made redundant, compounding the challenges they faced.

Inspired by the support of the midwife who helped deliver her youngest daughter, Lesley decided she would retrain while Darren, who is 49, took on the role of full-time carer. As a result of the financial strain they face Lesley, 46, not only works full-time as a midwife but must also take on extra bank shifts.

The family's daily routines are relentless, with both parents surviving on but a few hours sleep a night, and the girls all playing a hands-on role in helping look after their sister. Even everyday family functions like the school run, supermarket shop or an early shift at work are hugely stressful and exhausting.

Despite having a full-time income supported by additional hours, the family are struggling with thousands of pounds of debt.

"Amélie is absolutely fantastic, she's an absolute joy," Darren says. "But stress levels are through the roof. Amélie needs care 24 hours a day, every day and because of her medical needs and the lack of professionals who also have the sign language skills to communicate with Amélie it is almost impossible to get respite care. We have battled to get direct payments from the council to buy-in care support and have been given the equivalent of 16 hours at £7.20 an hour. If we could find the right care services, I very much doubt it would be available at that rate.

"But if I could change anything it would be the financial burden. Even if everything in the house is going well, there is still that financial worry hanging over us. I think people assume that there are loads of benefits supporting families like us. But that's not the case at all."

Our **We Care. Don't You?** campaign is calling on all political parties to take clear, decisive steps to reduce this kind of financial hardship and prevent carers like Darren and Lesley from reaching breaking point.

“

Amélie is absolutely fantastic, she's an absolute joy. But stress levels are through the roof

”

Giving expert advice, information and support

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

Last year we said that we would:

Extend the Adviceline to five days a week

What we did:

Adviceline

For the past 25 years we've provided an Adviceline to ensure that carers can get specialist advice on their rights and entitlements, wherever they live in the UK. In recent years financial constraints have meant we could only provide this service for four hours, two days a week. However, with funding from ITV Text Santa, we have been able to expand this service tremendously and are now open five days a week.

While this expansion has been rapid, it has also been carefully planned to ensure the growth is sustainable. With funding from Text Santa 2011 we were able to test a new 'Listening Ear' service delivered by current or former carers. These trained volunteers are able to offer much needed emotional support, respond to requests for publications or contact numbers, and book call-backs with qualified advisers. Since the launch of the service these volunteers have responded to nearly 3,000 calls.

The Text Santa 2012 appeal provided funding for the Adviceline to expand to five days a week, from December 2013. We were particularly pleased to be able to provide a service between 9am and 7pm on Mondays, which is our busiest time. This was a substantial undertaking, as we had to recruit and train new specialist advisers and update our telephone and computer systems.

As a result of this we have been able to increase the number of calls taken to over 19,000 and the average length of calls has increased with more in-depth advice being given. We also respond to all email enquiries, usually within one working day, and we have introduced regular Facebook discussions on key topics.

Publications

We have developed a new leaflet on the quality of care in conjunction with the Care Quality Commission (CQC). This is directly in response to our members' and other carers' feedback that concerns and complaints raised about care were not always heard or dealt with by the bodies responsible. Over 160 carers groups distributed leaflets to encourage carers to feed back both good and poor experiences of services in order to help inform CQC inspections.

In partnership with Lloydspharmacy, we produced 120,000 information leaflets which were distributed with prescriptions through 1,600 pharmacies in November.

Working with employers and service providers

By the end of the year 74 employers were members of our business forum Employers for Carers, and between them they employ over a million people. Employers receive help to develop carer friendly policies and establish support systems for staff who have caring responsibilities. This not only helps carers to stay in work but also helps the employer to retain valuable employees.

We also continued to help local authorities and other health and social care services to understand what carers need and design services which make carers' lives better. More than 77,000 carers live in the boroughs we worked with in 2013-14, which underlines the potential impact of this aspect of our work.

We provided training to help 974 professionals develop their knowledge in order to support carers better. As well as face-to-face courses, we have been working on a set of e-learning courses to make our training even more widely available, especially with the new Care Act on the horizon.

What we will do in 2014/15:

- Increase the number of calls taken by the Adviceline
- Develop an e-learning package which will help professionals to support carers
- Develop self-advocacy toolkits which will help carers to argue their own case better

Worried? Confused? Tired? We're here.

Caring can be tough.

The maze of rights and entitlements is complicated. We're here to help carers navigate a system that can feel bewildering.

The emotions involved in looking after someone can be confusing. We're here to listen and to help connect carers to support.



6 in 10 carers
feel that they are
at breaking point

During 2013-14 we took 19,000 calls from carers. Some of these carers were calling to get help with a single issue – such as understanding what benefits they are entitled to, or assessing the financial impact of giving up work. For many, financial, practical, emotional and physical issues combine to make it hard to carry on.

Our research shows that 6 in 10 carers feel that they are at breaking point. While listening, supporting and advising can't remove all of the problems and dilemmas carers are facing, it can help to make them bearable.

Jocelyn Prosser, 50 cares for her husband, Darran, and their daughter, Amy.

When Amy was three-years-old she was diagnosed with a rare genetic disorder – trichodystrophy. Just a year before Amy's diagnosis, her Dad, Darran, a steel worker, was involved in a horrific industrial accident which resulted in him losing an arm and leg. It was an incredibly difficult time for the family and in particular for Jocelyn who became carer to husband and daughter.

"When I look back I just think how did we get through that? Caring is not something you can plan for. Caring is something you just have to take on board and deal with as it comes. Truthfully, it was tough."

Caring has now been a part of Jocelyn's life for 30 years. Amy and Darran continue to need daily care support and

though Jocelyn has many years' experience in her role as nurse, councillor, carer, wife and mum, caring can still be tough.

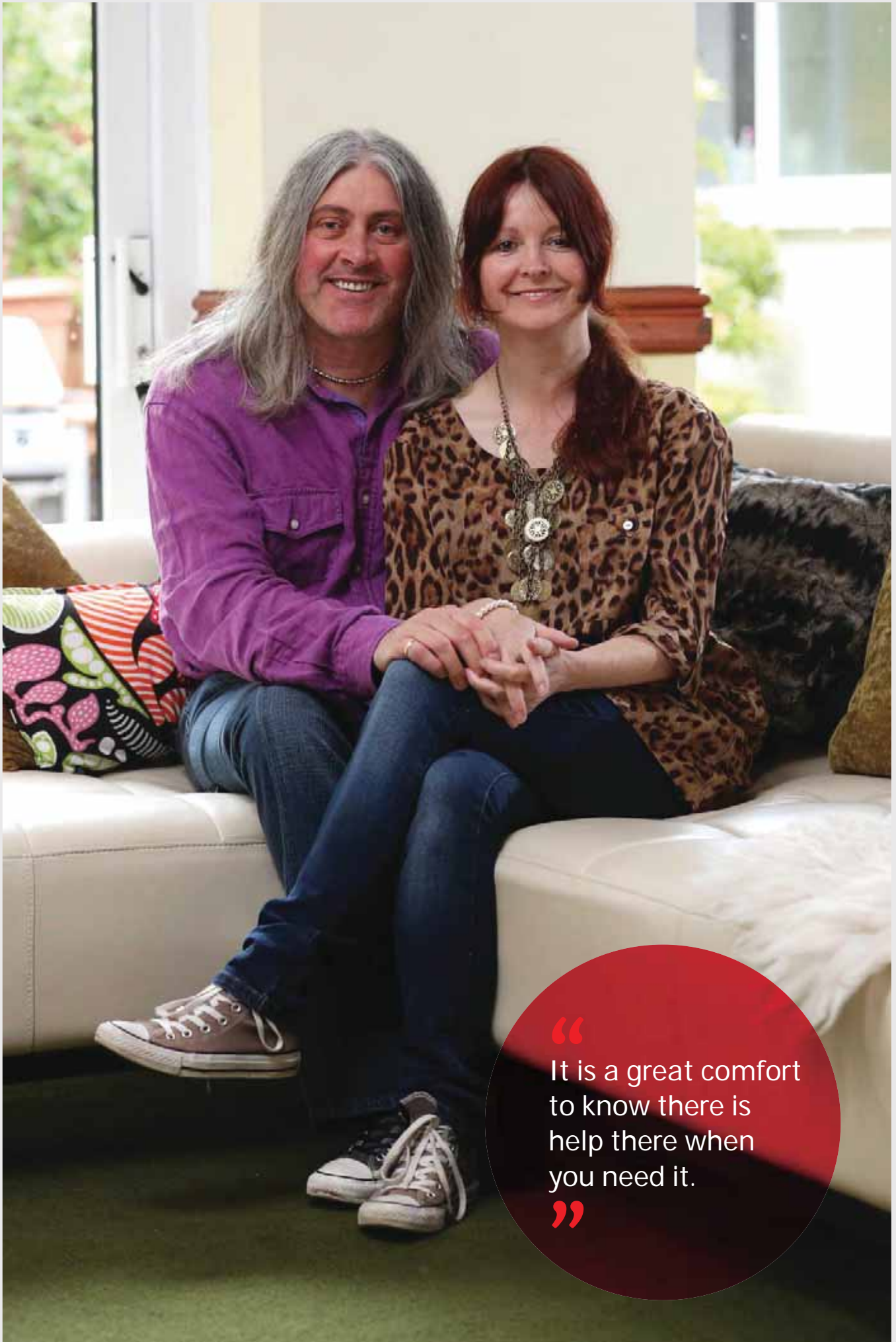
"It was at a time of sheer desperation that I came across Carers Wales. The number was passed to me by another parent. I made one phone call and straightaway got the information I needed to make sure we got the right support. I am so grateful for that phone-call."

"There are still times I need to pick up the information booklets and only yesterday I urged another parent who was at his wits' end over how to get help for his disabled son, to call Carers Wales and get advice."

"We do still have good days and bad days and I do worry about the future. But I feel today as if I matter, and Amy matters and Darran matters. It is a great comfort to know there is an organisation there to help you when you need it."

While we've transformed our capacity over the past year, there were many more calls that we weren't able to answer, and many more carers who aren't aware of the support that we provide and don't know where to turn.

We will continue to take every opportunity to boost our capacity and find new ways to reach carers with timely help and support.



“
It is a great comfort
to know there is
help there when
you need it.
”

Connecting carers so no-one has to care alone

Increase and improve our engagement with carers

Last year we said that we would:

- Implement a new strategy across the UK to improve how we connect at a local level with carers

What we did:

People using their caring experience to help other carers is right at the heart of our ethos. Our volunteers around the UK transform the lives of other carers - telling them about the help available, providing support so carers don't feel alone, improving and protecting services by campaigning and working with health and social care professionals.



Carers UK Local Ambassadors

Carers often find out about help and support through a chance conversation with another carer. With this word-of-mouth in mind, we piloted our scheme of volunteer Carers UK Local Ambassadors, who raise awareness of caring and reach out to carers in their local community. We initially recruited, trained and supported a group of 25 Ambassadors who held information events, gave talks and simply met with people in their local communities to tell them that caring affects us all, and help is available from Carers UK.

We've continued to expand the team throughout the year, and with their local knowledge, our Ambassadors are helping to ensure more and more carers are plugged into local support.



Working with GPs

GPs are often the first port of call for carers. With Department of Health funding our 22 volunteer GP Ambassadors are helping GP surgeries in England to improve how they identify and support carers. Some, like Pat Vinycomb (highly commended for her work at the prestigious Third Sector Volunteer awards), attend GP surgeries to offer carers information and signposting to services. Others are working with Clinical Commissioning Groups to ensure carers are at the heart of service development.

We also introduced a project in west London, funded by the local authorities, where staff worked with surgeries to train 'Carers Leads' to identify and offer support to carers.

Carers Northern Ireland worked in partnership with the Association of the British Pharmaceutical Industry NI to research and develop an online resource that will deliver early identification and signposting for carers and can be used in primary care. They also helped carers give their views on a proposed model of social care to Integrated Care Partnerships - Northern Ireland's new social care planning bodies which include GPs, pharmacists and other local partners.



Branches and local Carer Groups

Branches are a rich part of our heritage. Founded and run by passionate volunteers, often over several decades, they use their caring experience to reach out and support carers in their local community.

With a changing landscape and difficulties in recruiting committee members, we have been working with branches throughout the year to help develop a new structure which can better respond to local needs and reduce the administrative burden of running a group. We have helped several branches become independent carer groups, tied firmly into Carers UK through our new group membership scheme which we are planning to open up to other carer groups, strengthening our reach into local communities.

We used ITV Text Santa funding to support Christmas activities, such as lunches and trips to the panto organised by branches and groups.



Membership

We have over 18,000 members who ensure that carers are at the heart of everything we do. We regularly ask our members for their views and experiences and this informs all of our work. Members receive information from us, either by email or through 'Caring Magazine' and support each other through our online Forum or through Carers Groups. Many volunteer to help other carers by becoming Ambassadors, media volunteers, campaigners or working on the Adviceline.

Forum quotes:

“ For what it may be worth, there is a whole group of people who are with you, just at the end of your fingertips when you enter this site. Men and women, we have loved and lost and our thoughts are with you. You're not alone.”

“Just 'wow' that's all I've got...the world is indeed a better place tonight for having you all in it....we all seem to be in sync and it's a great comfort xxx Thanks” ”



What we will do in 2014/15:

- Deliver a new membership strategy so we can continue to grow as a supportive community and a movement for change
- Grow our carer group membership scheme to help voluntary groups support carers locally
- Grow a national volunteer programme to create more and better opportunities for people to get involved in our work

Case study

Pat's story

As a Nurse Manager working in the NHS and Private Health Care Sector, Pat had met many families and carers who were at crisis point. She applied to be a Carer Ambassador because she wanted to address the issues they were facing.



18

“

From a personal perspective, when my 23-year-old daughter, Emma, was suddenly diagnosed with a very rare and aggressive cancer in the muscles of her right leg, my whole life changed in a moment. Caring for Emma until her death in 2002 was a special time and during her treatment and care I met many wonderful people. We all learnt so much from this experience and I was determined that I would find a way to help other families.

In my Ambassador role, I have secured funding to set up an inter-agency carers project called 'Think Carer'; promoting a simple message to medical and nursing teams and other therapists.

This project has opened doors to carer groups across Dorset and Carers UK have been instrumental in providing access to best practice. Based in my local GP Surgery, Think Carer is being rolled out to other GP practices in our commissioning locality. The aim of the project is to encourage carers to register with their GP and ensure that they have access to information, support and respite services.

I also work strategically across Dorset, linking into community engagement initiatives and consultation through the Clinical Commissioning Groups and Dorset County Council. I am a member of the Royal Bournemouth Hospital Carers Forum and I am delighted to be able to contribute to a ward-based project for identifying and supporting families new to caring.

I have been appointed Vice Chair of Dorset Carers Partnership and we are in the process of consulting with agencies, carer groups and individual carers as to how the Carers Partnership can best reflect the opinions and needs of carers and their families.

I am currently looking at how best to support male carers and earlier in the year, ran a focus group to explore issues that affected the men living in Highcliffe, Dorset. As a result of this meeting we have set up a Male Carers Support and Social Group which has been the focus of a discussion on local radio and generated a lot of interest amongst local people.

Being a volunteer is very different to being a professional health care manager and some people may view the role of a volunteer as an outsider and amateur. The Carer Ambassador's Badge gives visible credibility to the work I do with agencies and health and social care organisations. I believe that the role of a volunteer should be seen within the context of being "professional" and our credibility is vital to developing the profile of our work for and with carers.

I have found the opportunity to meet and network with such an enthusiastic team of Carer Ambassadors an inspiration. I've really valued being able to share ideas and best practice, and be supported by the brilliant team at Carers UK.

”

Pat, Carer Ambassador, Dorset

We couldn't do what we do without you

Celebrating volunteers

We are forever indebted to the individuals who give their time, skills and understanding to help support and reach out to other carers.

Volunteer experiences

With 6,000 people becoming carers every day, it's a real challenge to ensure that every one gets support and advice from the start. Thanks to our volunteers, we stand a chance.

Building local networks, distributing resources, maintaining information systems, supporting online communities, talking to the media – volunteers help in all kind of ways to connect with other carers and raise awareness of caring.

Freda has been volunteering as a Carers UK Local Ambassador in Thamesmead, Greater London since November 2013. As a Local Ambassador, Freda works in her community to support carers at a local level and raise awareness of Carers UK and other local services.

Peter used to care for his wife, and has volunteered on the Carers UK Adviceline since March 2014. His role involves offering listening support to people call the Adviceline, as well as booking call-backs for carers who need advice from one of our trained advisers.

Michael is one of our longest serving volunteers. He has helped out in the Advice and Information team for the past ten years, sending information packs out to carers and making sure our records are up to date.



“
I felt empowered and motivated by meeting other carers

”
*Freda McEwan
Carers UK Local
Ambassador*



“
Volunteering has helped me get my confidence back

”
*Peter Hicks
Carers UK Adviceline
Volunteer*

“
I saw volunteering as an opportunity to reinvent myself

”
*Michael Crabbie
Carers UK A&I
Volunteer*



Innovating to find new ways to reach and support carers

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

What we did:

Investment in fundraising

The expansion of our services has been funded by the two grants received from Text Santa but these will only fund these additional services until the middle of 2015. In preparation for this, we have invested in our fundraising to bring in more voluntary income, but we have also taken steps to diversify our income so that we are not dependent on only a few sources.

Developing products and services

Over the past year we've started to develop commercial products, responding in particular to our research showing the potential of technology to make carers' lives better.

As well as helping carers, the sale of products and services opens up a new income stream to support our work.

We have set up a trading company which is a wholly owned subsidiary of the charity in order to take commercial opportunities as they arise. The company is a separate body with its own Board of Directors, operating within the same set of values as the charity.

Jointly

Our first commercial product, Jointly, is an innovative mobile and online app designed to help carers co-ordinate care with others.

As well as selling directly to carers we are also selling contracts to employers and service providers, whether as a benefit to the carers in their workforce, or to boost the support available to carers receiving their services.

"Surrey County Council has embraced Jointly for carers across the county and those employees who work within the council and partner agencies. We feel jointly is an innovative product we can offer carers in order to support them in their Caring role. It is especially useful for those who juggle work with care and those who are sharing the care with other family members, friends or neighbours."

John Bangs, Senior Manager Carers Commissioning, Adult Social Care, Surrey County Council



What we will do in 2014/15:

- Increase income
- Prepare for our 50th Anniversary Appeal

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

What we did:



Managing growth

Our expenditure has gone up by nearly 40% in the past 2 years (see Financial Review below). This has allowed us to expand our services to carers but it has also meant recruiting, training, and welcoming many new staff and volunteers.

We have had to update many of our systems and procedures to make sure that we work together effectively and our staff and volunteers have the right tools to help carers.

Our new telephone system has meant volunteers on our Adviceline can answer calls at home, and a new database has meant we can better measure the impact of our Adviceline on carers' lives and use it to improve how we work.

ITV Text Santa funding has improved the learning and support provided to our Ambassador and Adviceline volunteers.

Recognising that we won't always get it right, we have also introduced a new process for receiving complaints (and compliments!) which helps us learn how to put it right.

Our new look

Carers UK wants to help to create a society that respects, values and supports carers. In order to do this, we need to be visible and able to project a positive image of what carers do; the most common comment that we get is, *"if only I had known about Carers UK earlier"*.

To achieve this we set out to develop an active, modern and passionate identity that better reflects the true personality of the organisation; one that stands out from the crowd. We hope that you like it! *is an innovative product we can offer carers in order to support them in their Caring role. It is especially useful for those who juggle work with care and those who are sharing the care with other family members, friends or neighbours."*

What we will do in 2014/15:

- 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

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.

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, DL
Don Brereton CB
The Baroness Flather, DL
Dr Hywel Francis MP
The Baroness Pitkeathley, OBE
Caroline Walters OBE

Chief Executive

Heléna Herklots

Company Secretary

David Rouane

Trustees

Prof David Grayson CBE (Chairman, from December 2013) *FR/GC/R*

Geoff Almond (Vice Chair) *FR/R*

Linda Appleby (retired Nov 2013)

Catherine Bingham (Chair of Scotland Committee) *GC*

Don Brereton CB (Chair until retired Nov 2013)

Terry Bryan *FR*

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

Wesley Dowridge

Annie Dransfield (elected Nov 2013)

Maryann Finnegan

Sharon Flowers (retired Nov 2013)

Kate Griffiths (Vice Chair from Dec 2013) *GC/R*

Jeff Hayes *FR*

Michael Hirst

Richard Jones CBE

Ian Peters (Treasurer) *FR/R*

Terry Purnell (elected Nov 2013)

Alex Robinson (Vice Chair until Dec 2013)

Vita Snowden

Mary Trinder (Chair of Wales Committee)

Stephen Ward

Martha Wiseman (elected Nov 2013) *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
8 Angel Gate, City Road, London EC1V 2SJ

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

Financial Review

Total expenditure for the year was £4,258,755, up from £3,752,385 last year, an increase of £506,370 or 13%. This, on top of an increase of 23% last year, has meant a transformation in our ability to deliver the services to carers described earlier in this report. It also reflects an investment in future fundraising so that this level of services can be maintained in the coming years.

This has been made possible by the funding which we have received in the last two years from the ITV Text Santa Appeals for Christmas 2011 and Christmas 2012. In total these two appeals raised £1.6m for Carers UK which is being used to fund an expansion of our local services, through the Local Ambassadors programme and through Carer Groups, and of our Adviceline to a five day a week service. This money is being spent over a period of three years, with over £650,000 being spent in this year. This will guarantee the funding of the new services over this period and allow time for our other income to grow to the new level required.

The Statement of financial activities on page 28 shows a deficit (or “Net Movements in Funds for the year”) of £978,140. The vast majority of this, £781,368, is the deficit on Restricted Funds, representing the expenditure of funds received in previous years. The largest of these are the two ITV Text Santa Funds but there are others, including a grant of £115,000 which was received during last year from the Department of Health, in support of the GP Ambassador programme, was spent during this year.

A full list of the Restricted Funds, those given for a specific purpose, and the movements on the funds is given in Note 16 to the accounts.

The deficit in Unrestricted Funds of £196,772 represents a planned investment from our reserves in the infrastructure required, primarily in fundraising, to support the growth in activities.

Total income in the year was £3,281,595, down from £4,292,035 last year. This was due to the reduction in Restricted Funds as income was received in advance to fund projects this year (the largest being Text Santa).

Unrestricted Income was up to £1,291,068 from £812,808 last year reflecting the expansion of fundraising, with voluntary income up by £163,221 (31%), and in activities such as training and our consultancy to local authorities. This is part of our strategy to not only increase our income but to diversify the sources of income in order to reduce our dependency on a small number of funders.

Another part of this strategy was the creation of a trading company, which is wholly owned by Carers UK, to expand our commercial activities. The company made a small loss in this year of £3,904 as all of the costs of set up were paid, along with legal fees connected with the launch of Jointly, our first commercial product.

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 and 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 new

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 £514,250, which was above

both the ‘working capital requirement’ of £396,000 and the ‘amount required to fund an unexpected shortfall in income’ of £388,000.

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 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 24 September 2014 and signed on their behalf by

Prof David Grayson, CBE
(Chairman)

Ian Peters
(Treasurer)

Independent Auditor's Report

We have audited the financial statements of Carers UK for the year ended 31 March 2014 which comprise the Group 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 auditor

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 auditor 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 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. 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. 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 2014 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; and
- > 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; or
- > The parent charitable company's financial statements are not in agreement with the accounting records or returns; or
- > Certain disclosures of trustees' remuneration specified by law are not made; or
- > We have not received all the information and explanations we require for our audit.

Judith Miller (Senior Statutory Auditor)

for and on behalf of Sayer Vincent LLP, Statutory Auditors
8 Angel Gate, City Road, LONDON EC1V 2SJ
24 September 2014

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

Statement of Financial Activities

(for the year ended
31 March 2014)

Including an
income and
expenditure
account

	Notes	Unrestricted funds	Restricted funds	Total 2014	Total 2013
		£	£	£	£
INCOMING RESOURCES					
Incoming resources from generated funds					
Voluntary income	2	682,621	246,883	929,504	1,858,711
Investment and bank interest		31,192	119	31,311	21,838
Activities for generating funds		57,508	31,014	88,522	129,414
Trading activities		37,212		37,212	-
Total generated funds		125,912	31,133	157,045	151,252
Incoming resources from charitable activities					
Giving carers a stronger voice	3	99,155	380,145	479,300	473,814
Providing carers with support		299,116	897,209	1,196,325	1,294,115
Education, influence and training		84,264	435,158	519,422	514,143
Total income from charitable activities		482,535	1,712,512	2,195,047	2,282,072
Total incoming resources		1,291,068	1,990,528	3,281,596	4,292,035
RESOURCES EXPENDED					
Cost of generating funds					
Fundraising costs		330,365	5,474	335,839	255,421
Trading activities		41,116		41,116	-
Charitable activities					
Giving carers a stronger voice		233,410	806,045	1,039,455	818,593
Providing carers with support		333,885	926,216	1,260,101	1,603,039
Education, influence and training		354,028	1,189,050	1,543,078	1,031,495
Total expenditure on charitable activities		921,323	2,921,311	3,842,634	3,453,127
Governance costs		39,166		39,166	43,837
Total resources expended		1,331,970	2,926,785	4,258,755	3,752,385
Net incoming/(outgoing) resources before transfers	5	(40,902)	(936,257)	(977,159)	539,650
Unrealised (losses)/gains on investments	9		(981)	(981)	9,794
Transfers between funds	16	(155,870)	155,870		
Net movements in funds for the year		(196,772)	(781,368)	(978,140)	549,444
Reconciliation of funds					
Total funds brought forward		2,489,192	2,186,483	4,675,675	4,126,231
Total funds carried forward		2,292,420	1,405,115	3,697,535	4,675,675

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 16 to the financial statements.

Balance Sheet

(as at 31 March 2014)

	Notes	The Group		The Charity	
		2014	2013	2014	2013
		£	£	£	£
Fixed assets					
Tangible fixed assets	8	1,785,575	1,845,572	1,785,575	1,845,572
Investments	9	54,428	55,409	54,428	55,409
		<u>1,840,003</u>	<u>1,900,981</u>	<u>1,840,003</u>	<u>1,900,981</u>
Current assets					
Debtors	12	527,124	765,045	494,223	765,045
Cash on deposit: Head office and UK branches		991,581	1,817,590	991,581	1,817,590
Cash at bank and in hand: Head office		675,788	398,689	674,465	398,689
Cash at bank and in hand: UK branches		199,415	250,711	199,415	250,711
		<u>2,393,908</u>	<u>3,232,035</u>	<u>2,359,685</u>	<u>3,232,035</u>
Current liabilities					
Creditors: amounts falling due within one year	13	<u>(461,457)</u>	<u>(364,488)</u>	<u>(423,330)</u>	<u>(364,488)</u>
Net current assets		<u>1,932,451</u>	<u>2,867,547</u>	<u>1,936,355</u>	<u>2,867,547</u>
		3,772,454	4,768,528	3,776,358	4,768,528
Creditors: amounts falling due after one year	14	<u>(74,919)</u>	<u>(92,854)</u>	<u>(74,919)</u>	<u>(92,854)</u>
Net assets less current liabilities less creditors falling due after one year		<u>1,857,532</u>	<u>2,774,693</u>	<u>1,861,435</u>	<u>2,774,693</u>
Total net assets	15	<u>3,697,535</u>	<u>4,675,674</u>	<u>3,701,439</u>	<u>4,675,674</u>
Funds					
Restricted	16	1,405,115	2,186,483	1,405,115	2,186,483
Designated funds		1,778,170	1,845,572	1,778,170	1,845,572
General		514,250	643,619	518,154	643,619
Total funds		<u>3,697,535</u>	<u>4,675,674</u>	<u>3,701,439</u>	<u>4,675,674</u>

Approved by the Board of Trustees on 24 September 2014 and signed on its behalf by:

Prof David Grayson, CBE
(Chairman)

Ian Peters
(Treasurer)

The notes on pages 31 to 42 form part of these financial statements.

Cash Flow Statement

(for the year ended 31 March 2014)

	2014	2013	
	£	£	
Reconciliation of operating surplus to net cash outflow from operating activities			
Net incoming/(outgoing) resources before revaluations	(977,159)	539,649	
Investment income	(31,311)	(21,838)	
Depreciation charges	69,065	67,403	
(Increase)/decrease in debtors	237,921	(215,899)	
Increase/(decrease) in creditors	79,035	46,325	
Net cash inflow/(outflow) from operating activities	(622,449)	415,640	
Cash flows from capital expenditure			
Purchase of tangible fixed assets	(9,067)	-	
	(9,067)		
Cash flow statement			
Net cash inflow/(outflow) from operating activities	(631,516)	415,640	
Returns on investment	31,311	21,838	
Increase/(decrease) in cash	(600,205)	437,478	
Net cash inflow/(outflow) before management of liquid resources and financing	(600,205)	437,478	
Management of liquid resources			
(Decrease)/increase in cash	(600,205)	437,478	
Reconciliation of net cash inflow to movement of net funds			
Increase/(decrease) in cash for the year	(600,205)	437,438	
Cash used to increase liquid resources			
Change in cash and liquid resources	(600,205)	437,438	
Cash and liquid resources as at 1 April	2,466,990	2,029,512	
Cash and liquid resources as at 31 March	1,866,785	2,466,990	
Notes to cash flow statement			
Note (i) gross cash flows returns on investment			
Investment income	31,311	21,838	
Capital expenditure and financial investment			
Receipts from sale of investments	-	-	
Management of liquid resources			
Increase in short term deposits	-	-	
Note (ii) analysis of change in net funds			
	At 1 April 2013	Cash flows	At 31 March 2014
Cash in hand, at bank	2,466,990	(600,205)	1,866,785
Liquid resources	2,466,990	(600,205)	1,866,785

Notes to the Financial Statements

(for the year ended
31 March 2014)

1. Accounting Policies

(a) Basis of preparation of financial statements

These financial statements have been prepared under the historical cost convention, as modified by the revaluation of investments, and in accordance with the provisions of the Companies Act 2006 and Statement of Recommended Practice 2005 (SORP 2005) "Accounting and Reporting by Charities", issued by the Charity Commission, and comply with the applicable United Kingdom Accounting Standards.

(b) Branches

The financial statements incorporate the results of the UK Branches of Carers UK. The income, expenditure and fund balances of these branches are all utilised locally by the branches and the combined results of all branches can be seen in note 18 to the financial statements and are reflected within the restricted balances of the charity. The results of the branches are aggregated from returns which have been submitted to Carers UK that are prepared and signed by the local Treasurers. The year end reporting date for the branches consolidated within the financial statements is 31 December 2012.

(c) Tangible fixed assets and depreciation

Assets with a cost in excess of £5,000 are capitalised as fixed assets. The cost of fixed assets is written off over their estimated useful lives as follows:

- > Leasehold Premises: 2% per annum on cost
- > Leasehold Improvements: 5% per annum on cost
- > Equipment: 20% per annum on cost

(d) Investments

Investments are shown at market value. Realised and unrealised gains and losses are shown separately in the Statement of Financial Activities. Investment income is accounted for on an accruals basis.

(e) Incoming resources

Grants, donations and other voluntary income are accounted for on an accruals basis.

Membership subscriptions received during the year

that relate to a subsequent financial accounting period are carried forward as a creditor in the balance sheet and shown as subscriptions received in advance.

Activities for generating funds include corporate sponsorship and lottery proceeds.

Legacies are credited to income only when the charity receives the funds unless there is certainty that the charity is entitled to receive a known amount at a given time. "Certain" means the estate has been through Probate and the charity knows the exact amount that is due. At the year end there were 3 legacies subject to life tenants with an estimated value of £236,000 which are held in property and investments.

(f) Resources expended

All expenditure is accounted for on an accruals basis.

Cost of generating funds comprises fundraising and publicity costs which are incurred in seeking voluntary contributions for the charity.

Governance costs include those incurred in the management of the charity's assets, organisational administration and compliance with constitutional and statutory requirements.

Support costs include the central functions and have been allocated across the categories of charitable expenditure, governance costs and costs of generating funds on a basis consistent with the use of resources. Finance costs are allocated on the basis of expenditure. Other costs are allocated on the basis of head count.

Grants awarded are recognised when specific and unconditional commitment to provide grant funding is given and this has been communicated directly to the recipient, giving rise to a constructive obligation. In these circumstances there is a valid expectation by the recipients that they will receive the grant.

(g) Deferred Income

Grants and donations received before 31 March 2013, but which are specified by the donor for next financial period, are deferred to that period.

(h) Fund accounting

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

Designated funds comprise unrestricted funds that have been set aside by the Trustees for particular purposes. The aim and use of each designated fund is set out in the notes to the financial statements.

Office Funds represents:

- > a. the written down value of the leasehold premises and
- > b. the written down value of the leasehold improvements (incurred and committed)

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

Investment income and gains are allocated to the appropriate funds.

(i) Operating leases

Rentals under operating leases are charged to the statement of financial activities on a straight-line basis over the lease term.

(j) Pension Costs

The charity operates a defined contribution scheme. The assets of the scheme are held separately from those of the charity in an independently administered scheme.

Notes to the Financial Statements

(continued)

2. Voluntary income	Unrestricted	Restricted	2014	2013
	£	£	£	£
Donations and gifts, including membership	145,188	11,700	156,888	124,831
Funding for Strategic Partners Programme (a)	-	200,000	200,000	200,000
Legacies	227,235	10,000	237,235	241,955
Text Santa	-	-	-	919,925
Corporates	157,202	20,431	177,633	208,886
Trusts	31,900	-	31,900	71,147
Fundraising events	21,925	4,752	26,677	-
Other	99,171	-	99,171	91,967
	682,621	246,883	929,504	1,858,711

(a) Relates to a grant receivable from Department of Health (DOH) as part of the £200K Carers Strategy shared equally between Carers Trust and Carers UK.

3. Incoming resources from charitable activities	Contracted services	Grants & trusts (see note 3b)	Training & conferences	Other	2014	2013
	£	£	£	£	£	£
Giving carers a stronger voice	54,531	366,353	6,432	51,984	479,300	473,814
Provide carers with support	597,379	460,006	81,709	57,231	1,196,325	1,294,115
Education, influence and training	65,919	403,006	3,877	46,620	519,422	514,143
	717,829	1,229,365	92,018	155,835	2,195,047	2,282,072

3b. Grants and donations receivable

The grants and donations listed below were expended in accordance with the terms specified in each individual grant.

	2014	2013
	£	£
Advice and Information		
Big Lottery		54,346
Pennies		13,464
Sainsbury's		10,000
CHK Charities Limited		8,000
Dunhill Medical Trust		56,751
Dulverton Trust	25,000	25,000
John Ellerman Foundation		25,000
Henry Smith Charity	50,000	50,000

Notes to the Financial Statements

(continued)

3b. Grants and donations receivable - continued

2014

2013

£

£

The grants and donations listed below were expended in accordance with the terms specified in each individual grant.

St Charles Ward Project	Royal Borough of Kensington & Chelsea		6,294
Carers Ambassadors	Department of Health	101,000	180,000
Carers Week	Sainsbury's		26,500
Employers for Carers	Department of Health		51,000
	National Endowment for Science, Technology and the Arts	10,000	
Black and Minority Ethnic project	City Bridge Trust		8,250
	Trust for London		7,500
Communications, Campaigns, Media, Public Affairs	Joseph Rowntree Foundation	5,000	11,250
	Tunstall	25,000	
	Monument Trust		55,000
	Engage Mutual		5,000
Technology and Innovation	Technology Strategy Board	93,752	155,870
	Oxford Institute of Population Ageing	2,700	
	Nominet Trust	37,494	
Timebank	Big Lottery	15,127	
Nation offices			
Work in Scotland	Core grant	160,000	120,000
	Telecare	11,000	20,894
	Kitemark	47,679	46,509
	Carers Parliament	37,737	25,528
	Carers Advocacy	28,000	25,000
Work in Wales	Core grant	200,756	208,463
Work in Northern Ireland	The Atlantic Philanthropies	155,000	
	DHSSPS (NI) Core grant	60,873	42,143
	NI Human Rights Commission	14,500	
	Northern Health and Social Care Trust	39,552	39,552
	Other grants < £10,000	8,000	5,500
Carers UK Branches	Health and local authorities (various)	101,195	85,810
Total grants received for charitable activities		1,229,365	1,368,623

4. Total resources expended	Fundraising costs (inc. Trading Activities)	Giving carers a stronger voice	Providing carers with support	Education, influence and training	Governance costs	Support costs	2014	2013
	£	£	£	£	£	£	£	£
Staff costs (Note 6)	218,969	504,645	982,443	503,185		281,528	2,490,770	2,142,359
Fundraising costs	116,870						116,870	97,322
Finance						17,006	17,006	15,719
IT						45,513	45,513	68,773
General admin						165,586	165,586	98,629
AGM & Trustees' travel					21,793		21,793	38,606
Audit fees					12,000		12,000	11,250
Depreciation		20,720	20,719	27,626			69,065	67,403
Branch activities				204,528			204,528	183,215
Other costs	41,116	385,509	133,375	555,427	197		1,115,624	1,029,109
Total	376,955	910,874	1,136,537	1,290,766	33,990	509,633	4,258,755	3,752,385
Support costs		128,581	123,564	252,312	5,176	(509,633)		
Total resources expended	376,955	1,039,455	1,260,101	1,543,078	39,166	-	4,258,755	3,752,385

4a. Grants awarded	2014	2013
	£	£
(a) ITV Appeal Carers' Fund	8,003	14,060
(b) Islington Carers Hub (ICH)	16,820	17,020
(c) Department of Health: Carers Strategy	100,000	100,000
Lonsdale Trust	-	14,300
Wirral	-	26,786
Total	124,823	172,166

Note

(a) ITV Carers Fund Appeal refers to small grants made to carers to assist them with domestic matters and help improve their day-to-day quality of life.

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

(c) Grants of £100K to Carers Trust as part of the £200K DOH Carers Strategy Grant given to both charities which includes Carers UK.

Notes to the Financial Statements

(continued)

5. Net incoming resources for the year	2014	2013
	£	£
This is started after charging / crediting:		
Depreciation	69,065	67,403
Trustees' remuneration	nil	nil
Trustees' reimbursed expenses: travel, subsistence and care expenses	21,793	38,606
Auditors' remuneration	12,000	11,250
Operating lease rentals	21,264	55,578
Number of trustees whose expenses were reimbursed	13	13

6. Staff costs and numbers	2014	2013
	£	£
Salaries and allowances	2,170,321	1,875,198
Social security costs	218,312	191,331
Pension costs	102,137	75,830
	2,490,770	2,142,359
Total emoluments paid to staff were:	2,272,458	1,951,028
The average weekly number of employees (full-time equivalent) during the year was as follows:	2014	2013
	(No.)	(No.)
Charitable	62	52
Support	8	7
Fundraising	6	6
	76	65
Number of employees earning over £60,000	2014	2013
	(No.)	(No.)
£70,001-£80,000	1	1

7. Taxation

2014

2013

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% (2013: 20%)

-

-

8. Tangible fixed assetsLeasehold
buildingLeasehold
improvementsOffice / general
equipment

Total

£

£

£

£

Cost

As at 1 April 2013

1,361,012

803,651

9,067

2,164,663

Additions

9,067

9,067

At 31 March 2014

1,361,012

803,651

9,067

2,173,730

Accumulated depreciation

At 1 April 2013

129,349

189,741

-

319,090

Charge for year

27,220

40,183

1,662

69,065

At 31 March 2014

156,569

229,924

1,662

388,155

Net book value

At 31 March 2014

1,204,443

573,727

7,405

1,785,575

At 31 March 2013

1,231,663

613,909

-

1,845,572

9. Investments (held by Branches)

The Group

The Charity

2014

2013

2014

2013

£

£

£

£

Market value at the start of the year

55,409

45,615

55,409

45,615

Additions at historic cost

-

-

-

-

Disposal proceeds

-

-

-

-

Unrealised (loss)/gains

(981)

9,794

(981)

9,794

Market value at the end of the year

54,428

55,409

54,428

55,409

Historical cost at the year end

23,263

23,263

23,263

23,263

(All investments at 31 March 2014 were held by Branches.)**Investments are listed and comprise:**

Assets in the UK

32,113

32,552

32,113

32,552

Assets outside the UK

22,315

22,857

22,315

22,857

54,428

55,409

54,428

55,409

Notes to the Financial Statements

(continued)

10. Subsidiary undertaking

2014 2013

£ £

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	37,212	-
Cost of sales	-	-
Gross profit	37,212	-
Distribution costs	(7,200)	-
Administrative expenses	(33,916)	-
Other operating income	-	-
Profit/(loss) for financial year	(3,904)	-
The aggregate of the assets, liabilities and funds was:		
Assets	34,223	-
Liabilities	(38,127)	-
Funds	(3,904)	-

11. Parent Charity

2014 2013

£ £

The parent charity's gross income and the results for the year are disclosed as follows:

Gross income	37,212	-
Results for the year	(3,904)	-

12. Debtors

The Group

The Charity

	2014	2013	2014	2013
	£	£	£	£
Other debtors	327,804	197,313	294,903	197,313
Prepayments and accrued income	199,320	567,732	199,320	567,732
	527,124	765,045	494,223	765,045

13. Creditors: amounts due within one year	The Group		The Charity	
	2014	2013	2014	2013
	£	£	£	£
Other creditors	278,265	170,825	240,138	170,825
Other taxes and social security	63,161	51,592	63,161	51,592
Subscriptions: receipt in advance	54,237	73,860	54,237	73,860
Accruals	65,794	68,211	65,794	68,211
	461,457	364,488	423,330	364,488

14. Creditors: due after more than one year	The Group		The Charity	
	2014	2013	2014	2013
	£	£	£	£
HMRC Lennartz	74,919	92,854	74,919	92,854

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 of 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 £74,919 (2013: £92,854) falling due after one year, £nil (2013: £25,484) remains due after five years.

15. Analysis of group net assets between funds	Restricted funds	Designated funds	General funds	Total funds
	£	£	£	£
Tangible fixed assets		1,778,170	7,405	1,785,575
Investments	54,428			54,428
Net current assets	1,350,687		506,845	1,857,532
Net assets at the end of the year	1,405,115	1,778,170	514,250	3,697,535

Notes to the Financial Statements

(continued)

16. Movements in funds	As at 01/04/13	Incoming resources	Resources expended	Transfers between funds	Profit/(loss) on investments	As at 31/03/14
	£	£	£	£	£	£
Restricted funds						
Advice and information		76,000	76,000			
Carer Ambassador GP Training	115,000	101,000	201,373			14,627
Care and Support Alliance	37,736		37,736			
Carers Strategy		200,000	200,000			
Carers Week	14,688		14,688			
Employers for Carers	18,187		18,187			
ITV - Text Santa 2011	384,751		252,574			132,177
ITV - Text Santa 2012	919,925		401,090			518,835
Islington Carers Hub	78,822	347,528	280,170			146,180
Kensington & Chelsea	78,684	83,125	102,648			59,161
Technology & innovation		93,752	206,093	112,341		
Timebank		15,127	15,127			
Primary Care Navigator project		63,000	37,295			25,705
Nation offices:						
Wales	16,907	215,204	226,878			5,233
Scotland	78,038	348,659	350,028			76,669
Northern Ireland		299,353	267,585	43,529		75,297
Carers UK Branches	443,745	147,780	239,313		(981)	351,231
Total restricted funds	2,186,483	1,990,528	2,926,785	155,870	(981)	1,405,115
Unrestricted funds						
Designated funds:						
Office fund	1,845,573		67,403			1,778,170
Total designated funds	1,845,573		67,403			1,778,170
General funds	576,216	1,291,068	1,331,970	(155,870)		379,444
Transfer to office funds	67,403		(67,403)			134,806
Total general funds	643,619	1,291,068	1,264,567	(155,870)		514,250
Total unrestricted funds	2,489,192	1,291,068	1,331,970	(155,870)		2,292,420
Total funds	4,675,675	3,281,596	4,258,755	-	(981)	3,697,535

16. Continued - Notes on transfers between funds

(a) Technology & innovation	This project was partly funded by a restricted grant and partly by a transfer from general funds
(b) Northern Ireland	A transfer was made from general funds to support our work in Northern Ireland
(c) Office funds	This represents the net book value of the leasehold building and leasehold improvements to the property at Great Dover Street.
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	
Advice and information	Support for our Advice and Information services
GP Ambassador Programme	A project supported by the Department of Health to improve General Practitioners' identification and support of carers
Care and Support Alliance	Contributions from Alliance members in support of a campaign to secure improvements in social care
Carers Strategy	Support from the Department of Health Carers Strategy Fund for Carers UK and Carers Trust
Carers Week	Contributions from partners in support of Carers Week
Employers for Carers	Contributions to support work with employers
ITV - Text Santa 2011	Projects funded by the 2011 ITV Text Santa Appeal
ITV - Text Santa 2012	Projects funded by the 2012 ITV Text Santa Appeal
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
Technology & innovation	Funding from Technology Strategy Board to support technical innovation to support carers
Timebank	Funding from Big Lottery Fund in support of a joint project with Timebank
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
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
West Sussex Carers Fund	A legacy left for the benefit of carers in West Sussex
Leeds Fund	Funds held centrally on behalf of Leeds Branch
Isle of Wight (B Heaton)	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

Notes to the Financial Statements

(continued)

17. Commitments

2014

2013

£

£

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

21,264

31,628

1-5 years

50,550

23,578

18. Related party transactions

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

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

Thank you to all our
**donors and
supporters**

from the individuals who ran 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 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.



Carers UK makes life better for carers.

With your help, we can reach more of the UK's 6.5 million carers with the support, advice and information they need.

Visit carersuk.org to join us, support us or access our online resources.

20 Great Dover Street
London SE1 4LX

t: 020 7378 4999

e: info@carersuk.org



Carers UK Adviceline

For expert information and advice about caring.



0808 808 7777

(open Monday to Friday,
10am-4pm)



advice@carersuk.org