



# Annual Report 2019–20

**TRUSTEES' ANNUAL REPORT AND ACCOUNTS**  
**For the year ended 31 March 2020**

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Scotland Registered Charity Number: SC039307





## About Carers UK

Carers UK is the national membership charity for unpaid carers. Across the UK today 6.5 million people are carers, supporting a loved one who is older, disabled or seriously ill. Every day 6,000 people become carers, making an enormous contribution to society and saving the economy billions of pounds.

Our vision is of a society that respects, values and supports carers for the huge contribution they make to families and communities. 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. But this can sometimes become overwhelming, making it hard to cope with the challenges of caring and of building a life of your own.

Carers UK's mission is quite simple – however caring affects you and your family, we are here. We are here with expert advice, information, and support, including running the only national helpline for carers and their families.

We are tenacious campaigners, and together with our members, we strive for lasting change for carers. We connect carers so that no one has to care or feel alone. We are committed to innovating in order to find new ways to reach and support carers, using our know-how to develop useful products and spread the message that technology can play its part in making life better for carers.

Over our history our priorities have changed according to the challenges facing carers, but what has remained constant is that carers are at the heart of Carers UK, driving our work and leading us into the future.



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# Contents

04	Chair's statement
06	Chief Executive's statement
08	Battle for greater understanding and support for carers in our society
11	Being there for carers with information and advice, right from the start
14	Building a network of carer friendly employers
17	Growing income streams to increase our impact in 2019/20
20	Being a great place to work and volunteer
22	Make the best use of technology to work effectively and respond to changing behaviours
24	Thanking
25	Legal and administrative information
29	Financial statements 2019-20
29	Financial review 2019-20
32	Independent Auditor's report
35	Consolidated statement of financial activities
36	Balance sheets
37	Consolidated cash flow statement
38	Notes to financial statements

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# ‘In my time as Chair, the need for Carers UK has become even more obvious.’

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It seems only yesterday! I was sat for the first time in Carers UK HQ. The then CEO Heléna Herklots was explaining to me, the challenge that so many carers don't think of themselves as carers. She paused. She knew I was looking after my parents. She looked at me. Her guess was correct: I didn't then think of myself as a 'carer'. I was just a son trying to do my best to help my mum and dad as they grew frailer.

How many times in the eight years since that conversation, have I heard someone say: "I am not his (her) carer! I am his (her) husband (wife)!" Yet even more people have said to me over the years: "If only I had known at the beginning of my caring journey, all the things that I know now, how much easier it would have been!"

This is why the work of Carers UK continues to be so important. Our goal is that we can still be sons and daughters, husbands and wives, mums and dads as well as friends and neighbours whilst we are caring. This needs a

well-funded and stable Social Care system, a decent and fair level of Carers Allowance, first-class advice and information, employers ready to help working carers better juggle their job and caring, guaranteed and regular respite care, opportunities to continue living our own lives whilst we care and so on. All things we are working for.

This is my seventh and final foreword to the Annual Report of Carers UK. It has been humbling, challenging, and energising to serve as Chair and to work with dedicated and collegial fellow trustees, talented and hard-working staff colleagues and volunteers. It is invidious to single out individuals, but I want to say a special 'thank-you' to Ian Peters. Ian has already given almost 20 years of outstanding service to Carers UK as an adviser, trustee, Treasurer and latterly, as chair of Employers for Carers. Ian also stands down this Autumn. It is no exaggeration to say that without Ian's help back in 2003, Carers UK probably would not exist today.



I would also like to thank our patrons Tiggy and Johnnie Walker. They have been fantastic ambassadors, always ready to accept the challenge of raising money and raising profile, thank you so much for your continued support. And to our vice presidents including Baroness Jill Pitkeathley and Dame Phillipa Russell, who continue to inspire carers across the country.

In the final weeks of the year covered by this report, the UK faced the unprecedented challenges of the COVID-19 pandemic. I join fellow trustees in thanking Helen Walker and all the Carers UK staff for the extraordinary efforts they are putting in during what, at the time of writing, is the ongoing crisis.

Adding up the full board meetings, board committees, Nations Committees and Annual General Meetings, I have chaired or attended more than 130 formal meetings. I won't pretend that I will miss all those!

I will miss the camaraderie and the caring of the hundreds of members across the nations of the UK that I have met over the last eight years. Thank you for sharing your insight and experiences.

I wish my successor every good wish as they lead the organisation through the next period towards vision 2025. The organisation is in a strong position to do this.

Carers UK is not just the board or the hard-working staff team. It is our members and through them, millions of carers. We must continue to work for a society that respects, values and truly supports all carers. I promise you: I will.

**David Grayson CBE**

Chair



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# ‘Delivering on our promises and building for the future’

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The last 12 months at Carers UK have seen us build upon our reputation, our impact, and our financial position. When I joined Carers UK last year, I set out a plan, underpinned by investment in fundraising, to deliver more support to more carers. We delivered this by championing carers within government, nationally and locally, as well as ensuring our provision of advice, information and support was easy to access and available to all carers wherever they were. We were ambitious about extending our reach to working carers, helping employers to create the most carer friendly workplaces, recognising that real societal change can be achieved by working across sectors. I am delighted to start this Trustees Report and Accounts by reporting that we end the year in a strong financial position, delivering a surplus and a positive balance sheet. This gives us the confidence to be ambitious in the coming year, and importantly the plan we will develop through our strategic review for Vision 2025. Throughout this process we will keep one thing front of mind; whatever we do, we do it to make life better for carers.

It has been a successful year for Carers UK across all four nations, made all the more impactful by the economic and political back drop. The uncertainty of Brexit has meant we have had to analyse our business model. The General Election in December 2019 meant we had to quickly ensure our manifesto was considered and adopted by politicians. Through years of relationship building with all parties we have many champions in parliament, and were pleased to have two ministerial visits at Carers UK HQ, one to launch our e-learning resource Learning for Living with Caroline Dinenage MP the then Minister of State for Care, and another to launch the consultation on paid care leave, a longstanding policy ask, by Paul Scully MP the Minister for Small Business.

Similarly, in Wales and Scotland our profile and reputation has seen support from ministers. The Deputy Minister of Health and Social Services Julie Morgan AM attended an event hosted by Carers Wales in Carers Week. In Scotland Joe FitzPatrick MSP, Minister for Public Health, Sport and Wellbeing and Christina McKelvie MSP, Minister for Older People and Equalities



addressed the Carers Parliament in Edinburgh. Carers Scotland, on behalf of the Scottish Government, organised this important event. Working with other organisations to highlight issues facing unpaid carers is the role of the Wales Carers Alliance, and we are delighted that our Director of Carers Wales now chairs this group, ensuring collaboration is at the heart of what we do.

I couldn't write this overview of the year without mentioning the impact of COVID-19. We are still very much in the grip of this life changing pandemic. We know it has hit carers hard. Whilst only materially impacting one month of this reporting year, there were nonetheless huge adjustments made, primarily seeking funding to extend our support service at a time of unprecedented concern and crisis, and most critically talking with government and the NHS to ensure that carers were considered in all plans. We were consulted on the emergency legislation that led to the Coronavirus Act, and you have my assurance that we will do everything to ensure that the temporary roll back of rights and provisions are just that, temporary.

It is the work that was done throughout 2019 that has put us in the strongest possible position coming into this new financial year. But I must also pay tribute to our outgoing Chair, David Grayson, for the extraordinary commitment he has shown to carers during his eight-year tenure – I know he will remain a part of our Carers UK family.

Whilst none of us could have predicted what would happen, I am incredibly proud of my staff team who continue to truly make life better for carers. We will ensure greater support and justice for carers throughout the coming months and years and continue to champion carers wherever they are.

**Helen Walker**

Chief Executive

## Battle for greater understanding and support for carers in our society

### What we said we'd do:

Strive to keep Carers UK at the top of the policy agenda

- we will maintain pressure on Government to deliver on the promises in the Carers' Action Plan
- we will focus on campaigning for carers breaks, our Fairer for Carers campaign to have equitable Carer's Allowance across the nations and for 5-10 days statutory paid care leave
- we will lead on and expand Carers Week through partnerships to maximise impact
- we will increase response and diversity to our State of Caring survey and distribute results widely, launching at the State of Caring conference, to influence relevant changes to policy and carers' rights
- we will 'Track the Act' in Wales and hold the Welsh Government accountable to its documented policy
- we will deliver a successful Scottish Carers' Parliament in conjunction with carers and carers organisations across Scotland.

### Keeping focus on the unmet needs of carers

In a year that contained much political uncertainty, including a General Election, it was vital for us to engage with individuals and teams from across the political spectrum and make the case for the urgent need for better recognition and support for carers. Across the year and through our networks and tenacity, issues important to unpaid carers became much harder to ignore.

With our Chief Executive, Helen Walker on the NHS Assembly, the voice of unpaid carers has been central in consideration of how to deliver the NHS Long Term Plan in England and with other members of our leadership team occupying important roles on other panels and boards we leverage our influence at the highest level including within the devolved nations.

Our campaign to make life Fairer for Carers continued, calling on the Government to address the financial hardship faced by many carers, arguing for a tangible increase to Carer's Allowance and any Carer Premium/ addition/elements associated with it. We also campaigned on carers' breaks with our Give Us a Break campaign, and better rights for carers in the workplace.





The UK Government pledged to introduce a right to a week's unpaid care leave, launching a consultation in March 2020. This welcome development was the culmination of the presentation of good evidence from Carers UK, sound practice and evidence from employers such as Centrica, and a need from the economy to increase the number of workers to boost productivity.

We worked with researchers from the Universities of Birmingham and Sheffield on quantifying the likelihood for any of us to become a carer in our lifetime. The resulting *Will I care?* report has been used extensively across sectors to show the impact that caring has on the population and the need for fundamental improvements to care planning and support, including support at work.

## Our Carers' Manifesto for 2019

Ahead of the snap UK General Election, our Carers UK's Manifesto for Carers contained seven priorities for lasting change and a call to all political parties to commit to adopt them and support the millions of unpaid carers across the four nations. The majority of mainstream parties included reference to unpaid carers in their Manifestos or within their campaigning and this was followed by us working to deepen relationships with key figures in all parties.

## State of Caring survey

Our annual State of Caring survey, completed by more than 7,500 current carers, combined with years of evidence, consultation and the experiences of carers past and present, helped inform our Manifesto and the top priorities carers would want to see for the future. The State of Caring survey remains the largest survey tracking the needs of unpaid carers and is of immense importance in understanding their changing needs over time and is used by policy makers and planners alike.

90%

of carers don't know what might happen to the practical support they receive in the future or worry that it might be reduced

Shockingly, over two thirds of carers

68%

said they regularly use their own income or savings to pay for care or support services, equipment or products for the person they care for

Of those struggling to make ends meet

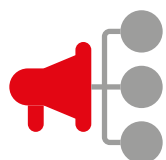
78%

regularly use their own income or savings to pay for care or support services, equipment or products for the person they care for

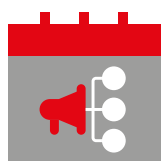


## A voice for carers across all nations

The year also included the reopening of the Northern Ireland Assembly, after three years, and saw our team working cross-party to identify and promote what was needed to deliver reforms to health and social care. The seventh Scottish Carers Parliament took place in Edinburgh with the theme of Diversity and Caring and was the most successful yet with the direct voices of carers amplifying the work being undertaken with the Scottish Government. Whilst in Wales we published the fourth Track the Act briefing on the implementation of the Social Services and Wellbeing Act and secured funding to increase the team to deliver more in the future.



**440 million**  
estimated media reach



**91.5 million**  
estimated media reach for  
Carers Week

## Speaking up for carers

As we close the year the advent of COVID-19 has been unprecedented, with Carers UK part of the core teams commenting on and reviewing legislation for England, Wales, Northern Ireland and Scotland and subsequent guidance within days, protecting carers' rights as far as we were able to. As the crisis unfolds, we will ensure we play a key part in Government groups feeding in carers' needs and concerns about everything from including carers in guidance, PPE, testing, carers' workplace rights and furloughing, Carer's Allowance rules and the level of benefit, whilst identifying the progress required in a number of significant areas.

### In this final year of our five-year plan we will:

- build in flexibility to make sure that we react to the coronavirus outbreak, highlighting carers' needs and helping to build a better present and future for carers.
- influence policy makers to ensure that carers' needs and experiences are reflected in planning and service delivery.
- undertake more groundbreaking research with carers, and in partnership with others, to ensure that their experiences and evidence leads to change.
- run high profile national campaigns around the things that matter to carers, including Carer's Allowance, rights in the workplace, breaks and the future funding of care.
- improve awareness amongst the public of carers and the support they need, by building on our awareness campaigns including Carers Week and Carers Rights Day.

## Priority

# Being there for carers with information and advice, right from the start

### What we said we'd do:

Increase and improve our provision of support to carers

- we will deliver the new website to transform the way we support carers 24 hours a day wherever they may be, embedding rich content such as videos to bring carers stories to life
- we will increase our capacity to support more carers through our helpline including email advice
- we will increase the number of listening support volunteers
- we will increase our membership to over 30,000 and refresh our membership offer to better support carers and be more reflective of their different experiences.
- we will run our annual membership conference with at least 140 members attending to share their experience and learn from one another.

### Our reputation for delivering expert information and support

Availability of high-quality information and support is vital to carers, whether new to caring or for those who have been doing so for some time. Our in-house team of specialists has grown in number to reflect our belief that through our publications, online information and our Helpline services, our ability to be a trusted source of support is paramount - perhaps now more than ever before. In addition to the regular updating of our factsheets we carried out a more extensive re-design, this year, to ensure the new format was more reader-friendly and accessible for carers whilst also simplifying our internal updating processes.

We understand how stressful life can be as a carer and that taking a break every so often is vital for carers' wellbeing and quality of life; yet too many carers struggle to get a break that works for them and the person they support. With funding from the Department of Health and Social Care and in partnership with Social Care Institute for Excellence, we developed a video series in which carers share their experiences and tips, with accompanying information resources. The videos have been viewed 5,348 times and there have been over 45k views to the Taking a Break web pages.

With the outbreak of COVID-19 teams came together to create specific, regularly updated information within the help and advice pages of the website, leading to an increase in traffic of 600% in the first month. These pages were shared by many others, including the Government, as providing trustworthy, high quality information.



**21,307**  
enquiries to our  
telephone Helpline



**2,047**  
contacts responded to  
by Carers NI helpline



## The importance of safeguarding

We are often dealing with people who may be vulnerable, in distress or in some way experiencing extremely challenging situations. As a reflection of this we built on and expanded our organisational safeguarding policy and associated training, which has been rolled out for all staff, and includes out-of-hours procedures for reporting and escalation.



### Janet's story

**“** As a full-time live-in carer, I needed a lot of information and fast. Carers UK stood out above all the other resources suggested to me. On the website and in the forum, I received immediate answers or concise direction for where to find the answers I needed. And the important aspect of that was not just the immediacy, making me feel like someone cared, but the information and direction was always up to date, efficient and effective help that I needed!

*“The main reason that Carers UK matters to me is that caring is underrated, even looked down upon, in our ‘modern’ society. Yet, when the shoe is on the other foot, suddenly people find they need help. And I know that there is no one as caring as people who care for a loved one...even when they think they are terrible at it. I want to help more people receive the support they need to feel good about the care they give or receive.”*

**Janet**





## Growing and supporting our membership

Although we ended just shy of our target with a membership of 29,403, we saw the rate of new members joining increasing at the end of the year. Our annual Members' Conference received the highest level of satisfaction recorded in the participants survey. The inclusion of carers as speakers throughout the day emphasised how they are at the heart of everything that we do and our other events for carers, throughout the nations, provided people with the opportunity to meet with others and share information and support.



*I am forever grateful to Carers UK for involving me... I have never looked back because there are so many unidentified carers out there who are desperately seeking guidance and practical help"*

**Mike**

## Improving our digital experience for all

Throughout the year we have been working hard to continuously improve the experience of using our existing website, through updating navigation and refreshing content, whilst working on the design phase of our new site with an aim to launch in 2020.



**2.85 million**  
views on the help and advice  
section of our website

### In this final year of our five-year plan we will:

- produce new relevant content in a range of formats for carers with particular focus on working and caring, Carer's Allowance and to provide emotional support for carers
- deliver a national telephone helpline service that will be open for calls for 45 hours a week compared to 12 hours a week last year, and expand our support by email to reduce waiting times
- deliver a Listening Support service for carers
- oversee and develop our online Forum to ensure it provides a supportive space for carers and former carers to share experiences.

## Priority

# Building a network of carer positive employers

### What we said we'd do:

Growing our EfC programme across sectors to improve carers lives in the workplace and increase income through membership fees

- we will work towards doubling the membership over the next three years
- we will co-write with Centrica's CEO a letter to the top 100 employers encouraging membership of EfC and to increase recognition of carers in the workplace
- we will roll-out the Carer Confident benchmark scheme, ensuring organisations are supported to improve conditions for their working carers.



# 168

members of Employers for Carers



# 2m

employees reached through organisations who are members

### Growing and supporting our network of Employers for Carers

Building on the work of the previous decade our team had high targets for increasing membership of Employers for Carers and encouraging organisations to best support and retain their staff who may be working and juggling caring responsibilities. With the addition of a specialist hub manager for Wales, we exceeded expectations in attracting new members alongside ensuring uptake of our Digital Resource for Carers, making it accessible to more employees across the UK.

The team expanded their programme of events for members including mentoring for peer learning and support, hosting events and roundtables and engaging with groups including with various Armed Forces Benevolent Funds to look at a potential research project on carers in the Armed Forces (serving and veterans). During EfC's 10th anniversary year in 2019, Carers Week and Carers Rights Day saw more employer activities than ever before.

**efc** employers for  
carers

**Carer Confident**   
The Employers for Carers benchmarking scheme

 **CARER POSITIVE**  
Employer in Scotland



14

Carer Confident accreditations



192

Carer Positive employers

### More organisations are becoming Carer Confident

We received additional funding from the Department of Health and Social Care for the Carer Confident benchmarking scheme that assists employers to build supportive and inclusive workplaces for staff who are, or will become, carers. Our first Carer Confident organisations were announced during Carers Week and since then the team have been working with an increasing number of organisations to submit their applications and to progress others through the three levels of Active, Accomplished and Ambassador.

### Carer Positive employers across Scotland

The Scottish Government funded Carer Positive scheme saw a growth of 33% more organisations now at Engaged, Established or Exemplary Level than in the previous year, reaching a potential 437,554 working carers. Our team provides advice and information on developing carer friendly policies and working practices whilst encouraging and guiding organisations through achieving their awards. In Carers Week we were pleased to announce that the First Minister, leader of the Labour Group and several other MSPs had been awarded Carer Positive accreditation as employers of staff in their constituency offices.

## Share that you care

During Carers Week British Gas and Carers UK launched the short film, *Two sides of the story*, which was featured online, distributed through social media channels and shown in cinemas as a trailer and went on to be nominated for, and win, several awards.



**“** I shed a tear over this, it's so true; please talk.  
There's so many of us that will understand”.



## Carers UK and Centrica

Both organisations have continued to work extremely closely together as part of their ongoing strategic partnership. Centrica's long-standing commitment to be an exemplary employer in terms of recognising the importance of supporting working carers has been demonstrated by continued efforts in both practical measures and thought leadership in this space.

Centrica continue to encourage other organisations to recognise carers in their workplace and introduce carer friendly policies. This has been evidenced through initiatives such as a joint letter from our CEOs to the top 100 employers in the UK with a follow up campaign of additional engagement in the following months, including a private roundtable on carers and care

leave and the publication of an employer resource guide. Centrica also recently supported an Employers for Carers research report on carers' Health and Wellbeing in the workplace and they launched a new and enhanced care leave policy for their employees. Centrica's continued efforts were recognised by being awarded the highest level in Carers UK's Carer Confident benchmarking scheme, Level 3: Ambassador and are also Carer Positive at Exemplary Level.

In March Centrica also supported a successful event on Carers and Employment, co-hosted by Carers UK, at St George's House, attracting attendance of leaders from multiple and various disciplines. This prestigious consultation focussed on discussing solutions for the growing societal issue of work and care and provided valuable insight to frame the development of Carers UK's new strategy set to launch in 2021.

### In this final year of our five-year plan we will:

- reach more employers and help them support more carers in their workforce through growing and rolling out Employers for Carers, Carer Confident and Carer Positive
- deliver engaging, accessible, quality-assured information resources for employers and working carers across a range of media
- consolidate Carers UK's position as the 'go to' organisation on support for working carers
- build partnerships to grow reach and influence policy



## Growing income streams to increase our impact in 2019/20

### What we said we'd do:

#### Invest in, diversify and grow our income streams

- we will ensure we have a high performing team in place
  - we shall invest in our legacy strategy in order to ensure the long-term health of the organisation
  - we will deliver outstanding supporter stewardship ensuring all of our donors, regardless of size of donation, experience the same high-quality communication with us
  - we will create and develop a mid-level donor scheme
  - we will increase opportunities to raise money for Carers UK
- through a wide variety of events and community fundraising activities. This will include providing more opportunities for carers and the people they care for to do together – diversifying our engagement with the carers' community including those from different faith groups
- we will deepen our relationships with corporate clients including, although not limited to, members of Employers for Carers and diversify our offer to include a range of commercial opportunities such as sponsorship, advertising and employee fundraising
  - we will broaden our appeal to a wider range of Trusts and Foundations including increasing applications within the nations
  - we will ensure readiness to respond to short and long-term opportunities from government and other statutory bodies as they arise. We will continue to build our reputation so that we are the 'go to' charity regarding unpaid caring in the UK.

### Focussing on creating a high performing team

Our main focus within fundraising was to create a high performing team in order to meet the increased targets year on year. The team was relatively new and the main challenge was to build upon and stabilise the income. Without exception it was important, and remains a focus, for us to establish and maintain relationships in order to gain maximum impact with funders of all types. We have ensured that senior members of staff are involved as appropriate with funder meetings, giving a greater breadth of understanding to our work, producing positive results. Our approach to diversifying income has ensured all our eggs are not in the same basket and continued our drive for unrestricted income.

The changes put in place meant that we exceeded our fundraising target, in year, with further committed income identified, providing a strong foundation for us to enter the coming year.



Founders event at the House of Lords



## Our strategic partnerships and relationships

Across the organisation and within all the nations, we continue to build on and develop our strategic relationships, including identifying income opportunities that help us to deliver our vital work. British Gas, as part of Centrica, and Nutricia were supporters of Carers Week 2019, whilst a grant from Seqirus allowed us to campaign on both the availability and importance of carers accessing their free flu jabs and staying healthy throughout the winter.

We were proud to successfully become a recipient of the Barclays Citizenship Programme grant; a three year programme whose overall objective is to keep more carers aged 50 and over in work. As a strategic objective of Carers UK this is fundamental to what we want to achieve, and we have been working on creating new resources to support this objective, these will be rolled out in the coming months and years.

We have worked closely with government departments and statutory bodies, continuing vital programmes of work but also developing new projects to have direct impact on improving the lives of carers. Through funding from Sport England we launched a research project on how sport and physical activity can help get the least active, active as well combat loneliness and boost wellbeing amongst carers. This funding has allowed us to complete the initial research phase and move in to the second phase of the project.

Meanwhile, our engagement with both national and local government has seen the renewal of major funding of core projects in Northern Ireland, Scotland and Wales, whilst the uptake of our Digital Resource for Carers by local authorities has demonstrably increased for the benefit of increasing numbers of carers in their area. This is testimony to the excellent work we have delivered previously, and how we are regarded as expert within these nations.

## Pears Foundation

Pears Foundation have pledged £250,000 to Carers UK since 2017. The Foundation's commitment to providing unrestricted funding is invaluable in allowing us to develop and strengthen the support we offer carers, deliver our public affairs work and develop impactful campaigns.

By building a strong ongoing relationship based on trust and maintaining open dialogue, we are building a partnership based on mutual understanding of the changing needs of unpaid carers.

We are so grateful to the family for their ongoing investment in our work.

**“** *The value of unrestricted or core funding is now clearer than ever. It helps organisations focus on what they do best, increases their resilience and their ability to respond to both challenges and new opportunities. We are proud to continue our unrestricted funding for the team at Carers UK, supporting their work to improve the wellbeing of the estimated 7 million unpaid carers across the UK.”*

*Sir Trevor Pears CMG, Executive Chair,  
Pears Foundation*

## Engaging with our supporters

We couldn't do all that we do without the dedication and generosity of our supporters and this year we put renewed focus on the importance of thanking them both promptly and personally and of keeping them informed as to the impact that their donations are making to the lives of carers.

We will be creating more opportunities to meet funders of all types over the coming year.

## Marie-Louise von Motesiczky Charitable Trust

Marie-Louise von Motesiczky Charitable Trust has committed £188,624 to Carers UK since 2016. The Trust is named after the acclaimed artist Marie-Louise von Motesiczky who cared for her mother in later life and produced several portraits of her.

Reflecting the Trustees' ongoing concern for the proper support of carers as well as Marie-Louise's moving family story, we are delighted that this year, the Trust has made a generous three-year investment in Carers UK.

This will enable us to develop a new volunteer listening support service.

**“** Marie-Louise von Motesiczky Charitable Trust is delighted to be able to further the invaluable work done by Carers UK, in recognition of the incalculable practical and emotional contribution made by carers of all ages and in all walks of life.”

*Frances Carey, Chair, The Marie-Louise von Motesiczky Charitable Trust*



Fundraisers at a Care for a Cuppa event

### In this final year of our five-year plan we will:

- strengthen our ability to accelerate our fundraising across a challenging and rapidly changing financial landscape, remaining flexible in our approach in order to maximise response to new opportunities
- make the ability to identify opportunities and ways to give easier via our website and through social media
- create more opportunities to engage with funders of all types
- ensure we generate an increased amount of unrestricted funding
- build on the work we developed this year by launching our legacy giving programme
- continue to work to demonstrate the value of funding Carers UK, developing a dynamic fundraising strategy that allows delivery of our ambition for the future.

## Being a great place to work and volunteer

### What we said we'd do:

Ensure that Carers UK is a great place to work at or volunteer for

- we will train our managers to support all staff and ensure employee wellbeing
- we will review and evaluate the organisational benefits package
- we will increase external volunteering opportunities for staff and establish ways to bring best practice back to the organisation
- we will ensure staff feel informed and inspired by improving the experience of core meetings and our staff conference
- we will re-engage with our founding members and celebrate our extraordinary history and achievements with them, as we look to learn from their experience.

### Celebrating our founding members

In July we held an event at the House of Lords celebrating the legacy of our founding and inaugural members who came together almost 55 years ago to create a movement for carers across the UK. The opportunity to share wisdom from across the generations was appreciated by all who attended alongside our Patrons, Johnnie and Tiggy Walker, members of the Board, past and present and others who have helped make the charity what it is today.

### Ensuring our staff are informed and engaged

Helen and our senior management team delivered on their commitment to improving communication with staff with a highly successful staff conference at the start of the year, followed by monthly all staff meetings including by video for the teams in the nation offices, a programme of lunch-and-learn and topic based learning sessions available to all, supplemented by a weekly staff bulletin.



## Volunteering for Carers UK

In early 2020, Hachette UK staff took part in a team volunteering day, distributing resources at over 40 locations across London. 100% of volunteers said that they would volunteer again for Carers UK and all would recommend taking part to their colleagues.





## Encouraging and developing our team of volunteers

Throughout the year our volunteers helped support our work at events, through the media, by providing feedback on projects and online. The importance of offering opportunities for volunteers that they could participate in from their own homes, including as Social Media or Insight Volunteers became especially important at the end of the year. We also ensured our volunteers stayed connected including through regular newsletters and updates and with new initiatives including Keep in Touch meetings via Zoom, first introduced by our Wales team.



*I had a great time. It was interesting to find out more about Carers UK and get a sense of how many people in the UK could benefit from the support they offer."*

*Hachette UK volunteer*



## New ways of working

In March we moved from office to home working and recognised that we had to develop new ways of working, reprioritise, and rapidly respond to the evolving situation.

### In this final year of our five-year plan we will:

- create a new strategy to lead us into our 60th anniversary year in 2025
- recruit, thank and support volunteers to enable us to reach and support more carers
- provide continuous staff development opportunities and training
- develop and enhance new ways of working, ensuring we have adapted to changed operational requirements
- focus on employee wellbeing.

## Priority

# Make the best use of technology to work effectively and respond to changing behaviours

### What we said we'd do:

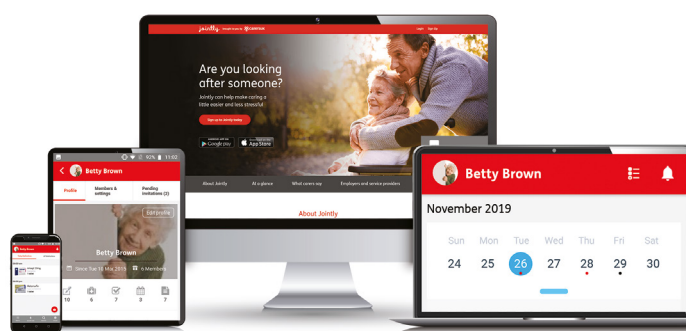
Enable effective systems and processes for both now and the future

- we will make the best use of technology to ensure we work effectively and are able to respond to the changing behaviours of all who engage with us
- we will ensure that systems are in place that allow for flexibility, accessibility including for the national offices and for those working remotely
- we will regularly review all technology and systems to ensure robust security is in place to minimise any risks to the organisation, its supporters and all data held.

### Ensuring our technology is up-to-date and secure

As a result of a successful funding bid to the Clothmakers' Guild, we were able to roll-out an upgrade to our information technology hardware and software, starting with our nation teams and concluding with our London office. This was part of our ongoing commitment to ensuring that our systems are secure, integrated and that they enable us to work efficiently with colleagues and partner organisations. Additional security protocols were introduced including remote verification and a review of systems including for video networking took place.

The upgrade to our systems meant that we were able to swiftly migrate to remote working as a result of the COVID-19 outbreak, with minimal disruption, having already tested abilities for staff to work from home ahead of the decision to close our offices.



## Jointly

We re-developed and launched our significantly upgraded Jointly App which enables carers to set up a 'circle of care' around the person that they care for. The need for keeping others well informed is ever more vital and this helps families and friends easily share important information. Jointly also received an NHS Apps Library accreditation.



*Looking after someone can be complicated. Jointly helps me stay on top of things and share information easily with everyone involved in the care of my son."*

*Julie*



## Supporting carers through digital solutions

On Carers Rights Day we held the first of our new series of webinars for carers, with an online event on the topic of maintaining mental wellbeing hosted by a Self-Care Coach and Carers UK member. The success of this event led to the development of an expanded programme of virtual ‘meet-ups’ including ‘learn and share’ events and more casual ‘Care for a Cuppa’ online chats with carers.



# 15%

increase in posts added to the online members’ forum



## Learning for Living

At an event attended by carers and then Minister for Care, Caroline Dinenage, we launched Learning for Living, our e-learning programme to help carers recognise their valuable skills and experience.



*Real life examples made the programme relatable and applicable to my caring role. I liked how I could complete the programme in my own time. The Envision Your Future module actually made me stop for a moment to think about what I want for my future.”*

*Carer*

### In this final year of our five-year plan we will:

- aim to rebuild and redesign our websites to meet organisational objectives
- produce inclusive online and offline communications for our key audiences
- provide effective organisational infrastructure to support staff across the UK.

# Thank you

Once again, we would like to extend our sincere thanks to the many people who have empowered us to carry out our charitable work this year.

Without donations from individuals, companies, charitable trusts, statutory funders and other partners, of both money and time, we would not have been able to reach, connect and support carers – no matter where they are in the UK.

Thank you all for your outstanding support.

We'd like to extend a very special thank you to the following:

- Awards for All
- Barclays LifeSkills
- Centrica
- Garfield Weston Foundation
- Halifax Foundation for Northern Ireland
- John James Bristol Foundation
- J S Trust
- Marie-Louise von Motesiczky Charitable Trust
- National Lottery Community Fund, Wales
- Northern Ireland Executive
- Nutricia
- Pears Foundation
- Sandy Lodge Golf Club
- Seqirus
- Sport England
- Standard Life Aberdeen
- The BUPA UK Foundation
- The Clare Milne Trust
- The Clothworkers' Foundation
- The Department of Health and Social Care through the Health and Wellbeing Alliance
- The Dulverton Trust
- The Francis Winham Foundation
- The John Coates Charitable Trust
- The National Lottery Community Fund and Nesta through the Accelerating Ideas programme
- The Scottish Government
- The Susan H Guy Charitable Trust
- The Triangle Trust 1949 Fund
- The ZVM Rangoonwala Foundation
- Trust for London
- Welsh Government

# Report of the Trustees

## For the year ended 31 March 2020

The Trustees present their report and audited financial statements for the year ended 31 March 2020. The financial statements comply with current statutory requirements, our Memorandum and Articles of Association and the Statement of Recommended Practice – Accounting and Reporting by Charities: SORP applicable to charities preparing their accounts in accordance with FRS 102.

### Legal and administrative information

#### Our aims

The Memorandum of Association sets out our aims for public benefit:

They are:

- To alleviate the conditions of life amongst people who are caring or who have cared for older, ill, disabled, or otherwise infirm persons (hereinafter called “carers”) and who are in, or risk finding themselves 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 illness 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.
- To promote such other exclusively charitable purposes as the Trustees in their absolute discretion from time to time determine for the benefit of carers and their families and dependants to the extent permitted by each of the laws of England and Wales, Scotland and Northern Ireland as applicable.

The Trustees confirm that they have complied with the duty in Part 1, Section 4 of the Charities Act 2006 to have due regard to the Charity Commission’s general guidance on public benefit, ‘Charities and Public Benefit’.

Our six strategic priorities for 2019 / 2020 reflected this public benefit: Campaigning for greater understanding and support for carers; Being there for carers with information and advice; Building a network of carer positive employers; Growing income streams to increase our impact; Being a great place to work and volunteer; Making the best use of technology.

The range of activities undertaken during the year reflecting this public benefit is described in the Report of the Trustees.

#### Structure, Governance and Management

The Trustees, supported by their committees, approve the overall strategy. The operational management of the charity is delegated to the Chief Executive, supported by a Senior Management Team, who make regular reports on progress against the agreed Business Plan to the quarterly meetings of the Board.

Matters reserved specifically for Board decision include the following: strategy; annual budgets; financial reporting and controls; structure and controls; board membership and other appointments; remuneration policy; corporate governance; key organisational policies; major financial transactions; procedures for Board decisions between Board meetings.

There are seven active sub-committees of the Board.



## Finance and Resources Committee

The Committee is responsible for reviewing the annual budget and for monitoring the performance of the organisation against its annual budget and business plan. The Committee is also responsible for monitoring and reviewing policies and processes in place for the identification and management of risk, the scope and effectiveness of the external audit and the appointment of an external auditor.

## Governance, Constitution and Membership Committee

The Committee is responsible for reviewing the Articles of Association, developing governance policies, overseeing the arrangements for the Annual General Meeting and having strategic oversight of Carers UK membership.

## Nominations Committee

The Committee is responsible for identifying and nominating candidates for election to the Board and its sub-committees. It is tasked with ensuring that there is always a majority of Carer members. It is also responsible for supporting Board learning and development.

## Remuneration Committee

The Committee sets and annually reviews the Chief Executive's remuneration. It is also responsible for approving Senior Management Team salaries. The Committee is chaired by the Treasurer, and its membership is the Honorary Officers of Carers UK. This is the Treasurer, Chairman and Vice Chair.

## Nations Committees

The Scotland, Northern Ireland and Wales Committees each contribute to the dimensions of the Carers UK strategy and corporate plan in the Nations, the work of the Nations and the preparation and implementation of the Nations work plan.

## Board of Trustees

In line with Carers UK's aims in terms of public benefit, the charity is governed by a Board, the majority of whom are carers.

The number of Board members may not be less than 11 nor more than 21. Board members are appointed for a term of four years and must stand down for a minimum of a year after two consecutive terms of office. The appointment must be approved by the members at the next Annual General Meeting which shall confirm the appointment.

On joining, Board members undergo an induction programme with training being provided during the year where necessary. They receive the constitution, the current five year strategy and information about the organisation and its activities. There is an annual Board strategy day. Induction also includes meeting key staff within the charity.

## Staff

During the year, the Senior Management Team comprised the Chief Executive, the Director of Business Development and Innovation, the Director of Carer Support, the Director of Finance and Resources, the Director of Fundraising and Communications, the Director of Policy and Public Affairs, the Director of Scotland and Northern Ireland and the Director of Wales. The Senior Management team is responsible for the day to day running of the organisation in line with the agreed strategy, and makes recommendations to the Board.

## Remuneration Policy

Carers UK is committed to a remuneration strategy that enables the charity to attract and retain appropriately skilled, experienced and qualified staff who can help realise our vision of a society that respects, values and supports carers. Remuneration comprises salary, pension contributions and other benefits and is periodically, but as a minimum of every three years, benchmarked against those for people in comparable roles and organisations.

## Responsible Fundraising

At Carers UK our members, supporters and volunteers matter to us a great deal. They are a vital part of what we do and we could not do our work without them. We have always aspired to the very highest standards and continually work to review and strengthen our procedures to ensure these standards are always met.

We are registered with the Fundraising Regulator and we take seriously our commitment to uphold their code of conduct within our fundraising to meet best practice within the sector.

We are pleased to report that we have received no complaints from members, supporters or volunteers as a result of our fundraising activity in 2019-20. Should we receive any complaints we take them extremely seriously. This helps us to remain accountable to our members, supporters and volunteers and ultimately improve how we work because of the feedback we receive.

Maintaining data security and privacy is an absolute priority for us, not just to meet our legal obligations but to build trust with those who support our carers movement. We undertake organisational training to ensure that staff meet our expectations of best practice for data protection. Carers UK will not swap or sell data with other organisations. We respect the wishes of any member, supporter or volunteer who no longer wishes to hear from us or who prefers to receive contact through certain channels, or not receive contact from Carers UK at all.

Our fundraising team works closely with third parties to ensure they adhere to the high standards Carers UK expects. Donations from individuals are an important source of income for Carers UK. We will never take the generosity of our donors for granted.

### Protecting the public

Since 2010, Carers UK has had a policy in place explicitly for the safeguarding of children and adults at risk. All staff are trained in its meaning and application. The policy has been circulated to all staff who have signed an acknowledgement that they have read and understood it and know how to escalate a safeguarding issue.

### Financial Risk Management

Carers UK had an excellent year in 2019/20 achieving an operating surplus of 399.9k. This will serve as a buffer to confront the challenges that lie ahead in 2020/21. We will undertake sensitivity analysis and scenario planning when appropriate and as part of our new strategy development.

### Principal Risks and Uncertainties

The Finance and Resources Committee has delegated authority from the Board to ensure that a review of the major risks to which the charity is exposed is conducted and that systems have been established to mitigate those risks. The Board receives a summary report quarterly and detailed report at least once a year.

Carers UK has a comprehensive risk management process in place to identify and address the major financial, operational, governance, reputational and regulatory risks which might impact on its ability to meet its objectives. Carers UK has an organisational risk register which records the major risks, the controls in place to mitigate those risks and actions required, if appropriate. The Senior Management team reviews and updates the register on a quarterly basis.

Internal risks are minimised by the implementation of procedures for authorisation of all transactions and programmes and to ensure quality of delivery for all operational aspects of the services provided. A Finance Procedures Manual has been adopted as part of the charity's policies and procedures to ensure that financial control procedures are applied uniformly across the charity.

Carers UK has identified the following key risks:

- The charity's dependence on voluntary income and in particular significant major gifts to fund running costs. To mitigate this risk we have developed a strategy to invest in, grow and diversify our income streams to ensure sustainability.
- Effective compliance with the Data Protection and Responsible Fundraising regulations and practices including the GDPR regulations. We will continue to review all our policies and procedures and CRM systems, the training of our staff and we will put in place a system to ensure we have taken the necessary steps to ensure compliance.
- The information security risk associated with a cyber-attack. In 2019/20 we have continued to make improvements to the general stability and security of our IT systems to ensure secure access. Our cyber security will be reviewed annually, and action will be taken based on recommendations that arise from the review.
- The arrival of COVID-19 has had an impact on our assessment of risks. We have not furloughed any of our colleagues instead we have redeployed them to meet the increase in demand for our carer support services. Our priority is, as always, to support carers in the best way we possibly can through this difficult time.

These risks are subject to ongoing monitoring by the Senior Management team. Carers UK also has a strategic business plan with aims, objectives and key performance indicators that are monitored monthly by the Senior Management team and also by the Board to ensure the effective delivery of the plan and the management of risk.

**Vice Presidents**

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

**Patrons**

Johnnie Walker MBE  
 Tiggy Walker

**Trustees**

Professor David Grayson CBE (Chairman) **FR/GCM/N/R**  
 Nick Baird CMG CVO (Chair-Elect) (*appointed July 2020*)  
 Virginia Pulbrook (Vice Chair) **FR/R**  
 Terry Bryan (Interim Treasurer) **FR/TR/R** (*retired October 2019*)  
 Eleanor Bradley (Treasurer) **FR/R**

Tim Anfilogoff  
 Dr Helen Brown **FR**  
 Paula Bryan **GCM**  
 Kevin Daly (*retired October 2019*)  
 Margaret Dangoor **GCM**  
 Beverley Harden  
 Colin Harper (Chair Northern Ireland Committee) (*co-opted March 2020*)  
 Andrew Hensman (*retired October 2019*)  
 Flora Martin MBE (Chair of Scotland Committee)  
 Paramjit Oberoi **GCM** (*retired October 2019*)  
 Sivakhanthan Shanmuganathan **TR**  
 Dr Rosie Tope **N**  
 Martha Wiseman **FR/GCM**

**Special advisors to the Board**

Jeff Hayes **FR**  
 Tara Macleod **TR** (*retired October 2019*)

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

**GCM** Member of the Governance, Constitution and Membership Committee

**N** Nominations Committee

**R** Member of the Remuneration Committee

**TR** Member of the Trading Board

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 approved by the members of Carers UK, or co-opted by the Board, in accordance with the requirements of the Memorandum and Articles of Association.

**Chief Executive**

Helen Walker

**Company Secretary**

Marie Magimay

**Principal Bankers**

Triodos Bank  
 20 Deanery Road, Bristol, BS1 5AS

**Solicitors**

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

**Russell Cooke**

2 Putney Hill, London, SW15 6AB

**Auditor**

Sayer Vincent LLP  
 Charity Accountants and Statutory Auditors  
 Invicta House, 108-114 Golden Lane, London EC1Y 0TL

**Investment manager**

Rathbone Investment Management  
 8 Finsbury Circus  
 London, EC2M 7AZ

**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

## 2019–2020

We are pleased to report that 2020 was a successful year in terms of income raised and progress made in the penultimate year of our 2017–2021 plan. For the year ending March 2020 Carers UK achieved a total income of £4.0m against total expenditure of £3.6m giving an operating surplus of £399.9k (£365k after unrealised gains on investments).

### INCOME

Unrestricted income increased from £1.4m in 2019 to £2.5m in 2020. This varies significantly year to year depending on the level of legacies and part of the increase is due to the higher level of legacies in 2020 compared to 2019.

Donations and legacies were £1.858m in the year an increase of £979k from 2019. Within this Fundraising Events increased by £200k to £299k; Corporate income increased by £384k to £582k; and Legacies increased by £359k to £484k. The overall cost of fundraising decreased by 15% (£57k) to £327k.

Incoming resources from charitable activities, received primarily from grants, statutory funding, consultancy and subscriptions, increased by £487k (30%) to £2.1m. This was mainly due to an increase in grants and subscriptions to our Digital Resource for Carers and Employers for Carers membership.

### EXPENDITURE

Overall, our total resources expended for the year were £3.6m, £391k higher compared to last year (2019: £3.2m).

During the year we spent a total of £3.3m on charitable activities. We increased unrestricted expenditure on charitable activities by £67k (4%) to £1.7m. Restricted expenditure increased by £383k (33%) to £1.5m, mainly due to the following: increase in delivering grants and expenditure received in previous years was spent down in 2020. The overall spending on charitable activities is £450k higher compared to last year due to these reasons.

Fundraising costs were £57k lower than last year £384k (2020: £327k). Our overall fundraising return was £5.70 for each £1 spent (2019: £2.30 for each £1 spent).

We have been able to commit 91%\* (2019: 88%) of expenditure to our core work of making life better for carers. \*Charitable expenditure is 91% (2019: 88%) of total resources expended excluding other resources expended.

### Cashflow

There was a cash inflow during the year.

### Reserves

Carers UK holds three different kinds of reserves funds: restricted funds, designated funds and general funds. At the end of 2019/2020 our total reserves were £3,474,344.

Our general funds increased by 47% to £1.126m. General funds are funds that are easily realisable and exclude restricted and designated funds. Carers UK reserves policy is to maintain a level of general reserves that will enable us to maintain and support the continuity of our programme of support to carers and provide sufficient working capital in the event of an unexpected loss of income or increase in expenditure. To mitigate any income risk due to the impact COVID-19 the Board have agreed that we should increase the general reserves fund to between 3 – 6 months forward expenditure. At 31 March 2020 the general reserve fund increased to £1.126m. This is equivalent to 5.1 months of 2021 budgeted unrestricted expenditure of £2.669m.

Our designated funds which are set aside by trustees to cover the value of property fixed assets or to fund specific future projects fell by £113k to £2.046m. Currently the designated fund balance relates to the London office with a value of £1.374m and £673k is nominally held as cover for the bank loan repayment and contingency.

Our restricted reserves are funds received for undertaking an activity specified by the donor or funder when making the gift. This increased by 116% to £301k.

## Investment policy

Investments are held to complement and support the reserves policy, requiring funds to be available at short notice to deal with a significant and sudden fall in income. The main investment objective is to protect capital and to invest in liquid assets. It is also intended to be a long term investment and as a result we are not overly concerned by the in year reduction.

During the year the Board reviewed our investment policy and agreed that surplus funds should continue to be invested in charity ethical pooled funds due to the current economic uncertainty.

On 31 March 2020 the investment in pooled funds was valued at £364,659 representing a reduction of 9% (£34,735) in the year. Details can be found in Note 9b.

## Going concern

We have outlined the charity's financial position and performance in the financial review above. We have assessed projected future income, expenditure and cash flows over the period to 31 March 2023, and analysed the strength of the charity's reserves, liquid assets and its ability to withstand a material fall in income. We have considered the stability and diversity of various income streams in making this assessment, particularly in light of the impact of COVID-19.

We have carefully considered the impact of the health crises and we are still confident there are no material uncertainties in the next 12 months. We have concluded that there is a reasonable expectation that the charity has adequate resources to continue its activities for the foreseeable future. Therefore, we have continued to adopt the going concern basis in preparing the financial statements.



# 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 adequate financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period.

In preparing these financial statements, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities Statement of Recommended Practice (SORP);
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK Accounting Standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements; and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.
- The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended).
- They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- There is no relevant audit information of which the charitable company's auditors are unaware; and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.
- The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

## Auditors

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

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

**Approved by the Trustees on 08 July 2020  
and signed on their behalf by:**

**Professor David Grayson, CBE**  
(Chairman)

**Eleanor Bradley**  
(Treasurer)

# Independent Auditor's report

We have audited the financial statements of Carers UK (the 'parent charitable company') and its subsidiaries (the 'group') For the year ended 31 March 2020 which comprise the consolidated statement of financial activities, the group and parent charitable company balance sheets, the consolidated statement of cash flows and the notes to the financial statements, including a summary of significant accounting policies.

The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the group's and of the parent charitable company's affairs as at 31 March 2019 and of the group's incoming resources and application of resources, including its income and expenditure, for the year then ended
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice
- Have been prepared in accordance with the requirements of the Companies Act 2006 and the Charities Act 2011

## Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report.

We are independent of the group in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

## Conclusions relating to going concern

We have nothing to report in respect of the following matters in relation to which the ISAs (UK) require us to report to you where:

- The Trustees' use of the going concern basis of accounting in the preparation of the financial statements is not appropriate; or
- The Trustees have not disclosed in the financial statements any identified material uncertainties that may cast significant doubt about the group's or the parent charitable company's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from the date when the financial statements are authorised for issue.

## Other information

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

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

information, we are required to report that fact. We have nothing to report in this regard.

## Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- The information given in the Trustees' annual report for the financial year for which the financial statements are prepared is consistent with the financial statements
- The Trustees' annual report has been prepared in accordance with applicable legal requirements

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

In the light of the knowledge and understanding of the group and the parent charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees' annual report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 and Charities Act 2011 requires us to report to you if, in our opinion:

- Adequate accounting records have not been kept by the parent charitable company, or returns adequate for our audit have not been received from branches not visited by us; or
- The parent charitable company financial statements are not in agreement with the accounting records and 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; or
- The Trustees were not entitled to prepare the financial statements in accordance with the small companies regime and take advantage of the small companies' exemptions in preparing the Trustees' annual report and from the requirement to prepare a strategic report.

## Responsibilities of Trustees

As explained more fully in the statement of Trustees' responsibilities set out in the Trustees' annual report, the Trustees (who are also the directors of the parent 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, and for such internal control as the Trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the group's and the parent

charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the group or the parent charitable company or to cease operations, or have no realistic alternative but to do so.

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

We have been appointed auditor under the Companies Act 2006 and section 151 of the Charities Act 2011 and report in accordance with those Acts.

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

As part of an audit in accordance with ISAs (UK), we exercise professional judgment and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the group's internal control
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Trustees
- Conclude on the appropriateness of the Trustees' use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the

group's or the parent charitable company's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the group or the parent charitable company to cease to continue as a going concern.

- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation
- Obtain sufficient appropriate audit evidence regarding the financial information of the entities or business activities within the group to express an opinion on the consolidated financial statements. We are responsible for the direction, supervision and performance of the group audit. We remain solely responsible for our audit opinion.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

## Use of our report

This report is made solely to the charitable company's members as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006 and section 144 of the Charities Act 2011 and regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

**Judith Miller**

(Senior Statutory Auditor)

**Date: 08 July 2020**

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

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

# Consolidated statement of financial activities

(incorporating an income and expenditure account)  
For the year ended  
31 March 2020

	Notes	Unrestricted Funds £	Restricted Funds £	Total 2020 £	Unrestricted Funds £	Restricted Funds £	Total 2019 £
<b>Income from:</b>							
<b>Donations &amp; Legacies</b>	<b>2</b>	<b>1,682,539</b>	<b>175,643</b>	<b>1,858,182</b>	802,493	76,923	879,416
<b>Charitable Activities</b>	<b>3</b>						
Giving Carers a stronger voice		310,178	396,792	<b>706,970</b>	244,919	288,886	533,805
Providing Carers with Support		283,968	611,030	<b>894,998</b>	232,488	482,753	715,241
Education, Influence and Training		163,327	338,203	<b>501,530</b>	135,408	231,583	366,991
<b>Total Charitable Activities</b>		<b>757,473</b>	<b>1,346,025</b>	<b>2,103,498</b>	612,815	1,003,222	1,616,037
Investments		4,611	-	<b>4,611</b>	4,257	-	4,257
Publication Sales		2,576	975	<b>3,551</b>	3,732	8,875	12,607
Misc Income		35,487	-	<b>35,487</b>	10,624	-	10,624
Trading Activities	<b>10</b>	-	-	-	179	-	179
		<b>42,674</b>	<b>975</b>	<b>43,649</b>	18,792	8,875	27,667
<b>Total income</b>		<b>2,482,686</b>	<b>1,522,643</b>	<b>4,005,329</b>	1,434,100	1,089,020	2,523,120
<b>Expenditure on:</b>							
<b>Raising funds:</b>	<b>5</b>						
Fundraising costs		326,603	-	<b>326,603</b>	384,007	-	384,007
Trading Activities	<b>10</b>	-	-	-	1,400	-	1,400
<b>Charitable Activities</b>							
Giving Carers a stronger voice		519,064	445,240	<b>964,304</b>	480,390	331,732	812,122
Providing Carers with Support		588,885	615,274	<b>1,204,159</b>	596,690	472,358	1,069,048
Education, Influence and Training		635,486	474,865	<b>1,110,351</b>	599,173	348,726	947,899
<b>Total Charitable Activities</b>		<b>1,743,435</b>	<b>1,535,379</b>	<b>3,278,814</b>	1,676,253	1,152,816	2,829,069
<b>Total Expenditure</b>		<b>2,070,038</b>	<b>1,535,379</b>	<b>3,605,417</b>	2,061,660	1,152,816	3,214,476
Net incoming/(outgoing) resources before transfers	<b>6</b>	412,648	(12,736)	<b>399,912</b>	(627,560)	(63,796)	(691,356)
Unrealised (Losses) on Investments	<b>9b</b>	(34,735)	-	<b>(34,735)</b>	(606)	-	(606)
Transfers between Funds		(128,775)	128,775	-	(106,013)	106,013	-
Net Movements in Funds for the year	<b>15a</b>	<b>249,138</b>	<b>116,039</b>	<b>365,177</b>	(734,179)	42,217	(691,962)
<b>Reconciliation of funds</b>							
Total funds brought forward		2,924,137	185,030	<b>3,109,167</b>	3,658,316	142,813	3,801,129
Total funds carried forward		<b>3,173,275</b>	<b>301,069</b>	<b>3,474,344</b>	2,924,137	185,030	3,109,167



# Consolidated balance sheet

Company number:  
00864097  
As at 31 March  
2020

	Notes	The Group		The Charity	
		2020	2019	2020	2019
		£	£	£	£
<b>Fixed assets</b>					
Tangible fixed assets	9a	1,392,823	1,442,710	1,392,823	1,442,710
Investments	9b	364,659	399,394	364,659	399,394
		1,757,482	1,842,104	1,757,482	1,842,104
<b>Current assets</b>					
Debtors	12	1,444,262	577,562	1,444,262	577,562
Cash on Deposit: Head Office		610,916	607,306	610,916	607,306
Cash at bank and in hand: Head Office		1,319,435	1,290,957	1,319,435	1,290,957
<b>Total current assets</b>		3,374,613	2,475,825	3,374,613	2,475,825
<b>Current liabilities</b>					
Creditors:					
amounts falling due within one year	13a	(1,031,973)	(535,752)	(1,028,522)	(537,981)
<b>Net current assets</b>		2,342,640	1,940,073	2,346,091	1,937,844
Creditors:					
amounts falling due after one year	13b	(625,778)	(673,010)	(625,778)	(673,010)
<b>Net Assets less current liabilities less Creditors falling due after one year</b>		1,716,862	1,267,063	1,720,313	1,264,834
<b>Total Net Assets</b>	14	3,474,344	3,109,167	3,477,795	3,106,938
<b>Funds</b>	15				
Restricted funds		301,069	185,030	301,069	185,030
Designated funds		2,046,761	2,160,117	2,046,761	2,160,117
General funds		1,126,514	764,020	1,129,965	761,791
<b>Total funds</b>		3,474,344	3,109,167	3,477,795	3,106,938

The financial statements have been prepared in accordance with the special provisions applicable to companies subject to the small companies regime.

Approved by the Board of Trustees on 08 July 2020

and signed on its behalf by:

**Prof David Grayson, CBE**  
(Chairman)

**Eleanor Bradley**  
(Treasurer)

The notes on pages 38 to 50 form part of these financial statements.

# Consolidated cash flow statement

For the year  
ended 31 March  
2020

	Notes	2020	2019
		£	£
<b>Cash Flows from operating activities:</b>			
Net incoming/(outgoings) resources before revaluations		365,177	(691,962)
Investment income		(4,611)	(4,257)
Depreciation charges		70,450	68,887
Unrealised loss on investment		34,735	606
(Increase)/Decrease in debtors		(866,700)	(245,358)
Increase/(Decrease) in creditors		448,989	42,441
Net cash (outflow) from operating activities		48,040	(829,643)
<b>Cash Flows from investing activities</b>			
Investment income		4,611	4,257
<b>Cash Flows from Capital Expenditure</b>			
Purchase of fixed assets		(20,563)	
Purchase of Investments		-	(400,000)
		(20,563)	(400,000)
<b>Cash Flows from financing activities</b>			
Cash inflows from new borrowings		-	-
Repayments of borrowings		-	-
		-	-
<b>Cash Flow Statement</b>			
Net Cash (Outflow) from operating activities		27,477	(1,229,643)
Returns on investment		4,611	4,257
(Decrease)/ Increase in Cash		32,088	(1,225,386)
Net Cash (outflow) before management of liquid resources and financing		32,088	(1,225,386)
Management of Liquid Resources			
(Decrease)/ Increase in Cash		-	-
<b>Reconciliation of net cash inflow to Movement of net funds</b>			
(Decrease)/ Increase in Cash		32,088	(1,225,386)
Cash used to increase liquid resources			
Change in cash and liquid resources		32,088	(1,225,386)
Cash and liquid resources as at 1 April		1,898,263	3,123,649
Cash and liquid resources as at 31 March		1,930,351	1,898,263

## Notes to Cash Flow Statement:

### Note (i) Analysis of change in net funds

	As at 1 April 2019	Cash Flows	As at 31 March 2020
Cash in Hand, at Bank	1,898,263	32,088	1,930,351
Liquid Resources			
	1,898,263	32,088	1,930,351

# Notes to the financial statements

For the year  
ended 31 March  
2020

## 1 Accounting policies

### Statutory Information

Carers UK Limited is a charitable company limited by guarantee and is incorporated in the United Kingdom. The registered office address is 20 Great Dover Street London SE1 4LX.

### Basis of preparation

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102 – effective 1 January 2019) – (Charities SORP FRS 102), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (March 2018) and the Companies Act 2006.

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

### Reporting period

The financial statements cover the year to 31 March 2020.

### Public benefit entity

The charitable company meets the definition of a public benefit entity under FRS 102.

### Going concern

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

### Recognition of income

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

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

For legacies, entitlement is taken as the earlier of the date on which either: the charity is aware that probate has been granted, the estate has been finalised and notification has been made by the executor(s) to the charity that a distribution will be made, or when a distribution is received from the estate. Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably and the charity has been notified of the executor's intention to make a distribution. Where legacies have been notified to the charity, or the charity is aware of the granting of probate, and the criteria for income recognition have not been met, then the legacy is treated as a contingent asset and disclosed if material.

### Donations of gifts, services and facilities

Donated professional services and donated facilities are recognised as income when the charity has control over the item or received the service, any conditions associated with the donation have been met, the receipt of economic benefit from the use by the charity of the item is probable and that economic benefit can be measured reliably. In accordance with the Charities SORP (FRS 102), volunteer time is not recognised so refer to the trustees' annual report for more information about their contribution.

On receipt, donated gifts, professional services and donated facilities are recognised on the basis of the value of the gift to the charity which is the amount the charity would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognised in expenditure in the period of receipt.

## Interest receivable

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

## Fund accounting

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

## Recognition of expenditure

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

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

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

## Allocation of support costs

Support costs are those functions that assist the work of the charity but do not directly undertake charitable activities. Support costs include office costs, finance, personnel, payroll and governance costs which support the Trusts programmes and activities. These costs have been allocated between cost of raising funds and expenditure on charitable activities. The bases on which support costs have been allocated are set out in note 5.

## Operating leases

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

## Tangible fixed assets

Items of equipment are capitalised where the purchase price exceeds £10,000. Depreciation is provided at rates calculated to write down the cost of each asset to its estimated residual value over its expected useful life. The depreciation rates in use are as follows:

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

## Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

## Cash at bank and in hand

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

## Creditors and provisions

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

## Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortised cost using the effective interest method.

## Pensions

The charity contributes to a stakeholder pension scheme on behalf of its staff, and the cost is recognised as incurred. This is a defined contribution scheme.

## Taxation status

As a charity Carers UK Limited is exempt from taxation of income and gains falling within Section 505 of the Taxes Act 1988 or Section 256 of the Taxation of Chargeable Gains Act 1992 to the extent these are applied charitably. No tax charge has arisen in the year.

## 2 Voluntary income

	Unrestricted	Restricted	2020	Unrestricted	Restricted	2019
	£	£	£	£	£	£
Donations and Gifts inc. Membership	79,233	1,027	<b>80,260</b>	84,687	8,328	93,015
Funding for DH (HAWA) (a)	-	59,998	<b>59,998</b>	-	59,999	59,999
Legacies	484,136	-	<b>484,136</b>	125,298	-	125,298
Corporates	479,866	101,920	<b>581,786</b>	195,970	1,744	197,714
Trusts	229,922	-	<b>229,922</b>	194,566	-	194,566
Fundraising Events	286,539	12,509	<b>299,048</b>	92,376	6,201	98,577
Tax reclaims	13,716	189	<b>13,905</b>	12,946	651	13,597
Payroll Giving	109,127	-	<b>109,127</b>	96,650	-	96,650
	<b>1,682,539</b>	<b>175,643</b>	<b>1,858,182</b>	802,493	76,923	879,416

(a) Relates to a grant receivable from Department of Health (DH) as part of the £59,998 Social Care Health and Wellbeing Alliance (HAWA) shared equally between Carers Trust and Carers UK.

## 3 Income resources from charitable activities

Incoming resources from charitable activities (current year)	Contracted Services	Grants & Trust - See Note 4	Training & Conferences	Donations & Misc.	2020	2019
	£	£	£	£	£	£
Giving Carers a stronger voice	32,315	351,794	22,746	300,115	<b>706,970</b>	533,805
Provide Carers with Support	18,096	566,491	31,607	278,804	<b>894,998</b>	715,241
Education, Influence and Training	14,219	311,505	15,943	159,863	<b>501,530</b>	366,991
	<b>64,630</b>	<b>1,229,790</b>	<b>70,296</b>	<b>738,782</b>	<b>2,103,498</b>	1,616,037

Incoming resources from charitable activities (prior year)	Contracted Services	Grants & Trust -	Training & Conferences	Donations & Misc.	2019	2018
	£	£	£	£	£	£
Giving Carers a stronger voice	34,000	252,459	11,871	235,474	533,805	484,015
Provide Carers with Support	33,000	442,941	13,050	226,249	715,241	574,003
Education, Influence and Training	33,000	194,339	6,980	132,672	366,991	410,771
	100,000	889,739	31,901	594,395	1,616,037	1,468,789



## 4 Grants and Donations Receivable

The Grants and Donations listed below were expended in accordance with the terms specified in each individual grant. Certain grants were made under an Act of Parliament and have been annotated as follows:

Charitable Activities		2020 Restricted £	2019 Restricted £
Communications, Campaign, Media & Public Affairs	The Dulverton Trust	35,000	-
	Sport England	57,401	-
Technology & Innovation	Money Advice Centre – What Works Fund	-	46,300
	Marie-Louise von Motesiczky Charitable Trust	100,000	72,649
	Clothworkers Company	25,000	-
	Other grants< £20000	15,000	9,000
	BUPA UK Foundation	55,200	13,800
Carers UK Volunteer Programme	Nesta	50,000	50,000
Information, Support & Advice	Barclays Bank	135,362	-
	Garfield Weston Foundation	10,000	-
<b>Nation offices:</b>			
<b>Scotland:</b> Work in Scotland	Core Grant	135,000	135,000
	Carer Positive	115,400	80,584
	Carers Parliament	31,000	20,882
	Trusts< £15,000	13,050	21,000
<b>Wales:</b> Work in Wales	Welsh Government Sustainable Social Services Grant	210,257	224,313
<b>Wales:</b> Learning for Living	Welsh Government	35,000	45,000
	Other grants< £10000	9,500	2,500
	Big Lottery	93,161	69,609
<b>N.Ireland:</b> Work in N.Ireland	DHSSPS (N.I): Core Grant	31,607	31,607
	Northern Health and Social Care Trust	39,552	39,552
	The Triangle Trust 1949 Fund: Core Grant	20,000	25,000
	Other grants< £10,000	13,300	17,000
<b>Total grants received for charitable activities</b>		<b>1,229,790</b>	<b>889,740</b>

## 5 Total resources expended: current year

	Costs of raising funds	Giving Carers a stronger voice	Provide Carers with Support	Education, Influence and Training	Governance Costs	Support Costs	2020	2019
	£	£	£	£	£	£	£	£
Staff Costs (Note 7)	223,516	636,390	736,651	643,899	-	215,506	<b>2,455,962</b>	2,009,790
Fundraising costs	103,087	-	-	-	-	-	<b>103,087</b>	182,698
Finance	-	-	-	-	-	69,787	<b>69,787</b>	118,616
Information Technology	-	-	-	-	-	28,086	<b>28,086</b>	35,144
General Administration	-	-	-	-	-	148,738	<b>148,738</b>	156,324
AGM and Trustees travel	-	-	-	-	23,501	-	<b>23,501</b>	12,115
Audit Fees	-	-	-	-	11,500	-	<b>11,500</b>	12,000
Depreciation	-	21,135	21,135	28,180	-	-	<b>70,450</b>	68,887
Direct costs	-	156,395	299,657	238,254	-	-	<b>694,306</b>	618,901
<b>Total</b>	<b>326,603</b>	<b>813,920</b>	<b>1,057,443</b>	<b>910,333</b>	<b>35,001</b>	<b>462,117</b>	<b>3,605,417</b>	3,214,476
Support Costs – allocated by staff time apportionment	-	139,340	133,935	188,842	-	(462,117)	-	-
Governance Costs	-	11,044	12,783	11,174	(35,001)	-	-	-
<b>Total resources expended</b>	<b>326,603</b>	<b>964,304</b>	<b>1,204,161</b>	<b>1,110,349</b>	<b>-</b>	<b>-</b>	<b>3,605,417</b>	3,214,476

## Total resources expended: prior year

	Costs of raising funds	Giving Carers a stronger voice	Provide Carers with Support	Education, Influence and Training	Governance Costs	Support Costs	2019	2018
	£	£	£	£	£	£	£	£
Staff Costs (Note 7)	201,309	498,887	598,772	477,710	-	233,112	2,009,790	1,916,502
Fundraising costs	182,698	-	-	-	-	-	182,698	130,731
Finance	-	-	-	-	-	118,616	118,616	104,927
Information Technology	-	-	-	-	-	35,144	35,144	65,165
General Administration	-	-	-	-	-	156,324	156,324	132,718
AGM and Trustees travel	-	-	-	-	12,115	-	12,115	23,486
Audit Fees	-	-	-	-	12,000	-	12,000	12,000
Depreciation	-	20,666	20,666	27,555	-	-	68,887	70,550
Direct costs	1,400	121,250	282,307	213,944	-	-	618,901	635,572
<b>Total</b>	<b>385,407</b>	<b>640,803</b>	<b>901,745</b>	<b>719,209</b>	<b>24,115</b>	<b>543,196</b>	<b>3,214,476</b>	<b>3,091,651</b>
Support Costs – allocated by staff time apportionment	-	163,682	158,136	221,378	-	(543,196)	-	-
Governance Costs	-	7,637	9,166	7,312	(24,115)	-	-	-
<b>Total resources expended</b>	<b>385,407</b>	<b>812,123</b>	<b>1,069,047</b>	<b>947,899</b>	<b>-</b>	<b>-</b>	<b>3,214,476</b>	<b>3,091,651</b>

## Grants awarded

	2020	2019
	£	£
Department of Health (DH): Social Care Health and Well being Alliance (HAWA)	29,999	29,999
<b>Total</b>	<b>29,999</b>	<b>29,999</b>

Note: Grants of £29,999 to Carers Trust as part of the £59,998 DH HAWA given to both charities which includes Carers UK.

## 6 Net Incoming resources for the year

	2020	2019
	£	£
<b>This is stated after charging:</b>		
Depreciation	70,450	68,887
Trustees' remuneration	-	-
Trustees' reimbursed expenses: Travel, subsistence and care expenses	1,387	5,976
Auditors' remuneration	11,500	11,300
Over provision in prior year	-	-
Operating lease rentals	-	1,261
Number of Trustees whose expenses were reimbursed	6	9

## 7 Analysis of staff costs, trustee remuneration and expenses, and the cost of key management personnel

	2020	2019
	£	£
Salaries and Allowances	2,110,666	1,747,354
Social Security Costs	208,157	175,261
Pension Costs	124,030	84,127
Redundancy costs	13,109	3,048
	<b>2,455,962</b>	<b>2,009,790</b>
<b>Total emoluments paid to staff were:</b>	<b>2,247,805</b>	<b>1,834,529</b>

The average weekly number of employees (based on head count) during the year was as follows:

	2020	2019
	No.	No.
Charitable	47	39
Support	9	8
Fundraising	6	5
Total emoluments paid to staff were:	<b>62</b>	<b>52</b>
Number of employees' earning over £60,000		
£80,001 - £90,000	1	-
£70,001 - £80,000	1	1
£60,001 - £70,000	3	3

The total employee benefits including pension contributions and employer's national insurance of the key management personnel were £138,608 (2019: £105,159).

The charity trustees were not paid or received any other benefits from employment with the charity in the year (2019: £nil).

No charity trustee received payment for professional or other services supplied to the charity (2019: £nil).

## 8 Taxation

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:

	2020	2019
	£	£
UK Corporation tax at 20% (2018: 20%)	-	-

## 9 Tangible fixed assets

	Leasehold Building	Leasehold Improvements	Office/Gen Equipment	Total
	£	£	£	£
<b>Cost</b>				
At 1 April 2019	1,361,012	803,651	15,732	2,180,395
Additions	-	-	20,563	20,563
At 31 March 2020	<b>1,361,012</b>	<b>803,651</b>	<b>36,295</b>	<b>2,200,958</b>
<b>Accumulated Depreciation</b>				
At 1 April 2019	292,671	430,838	14,176	737,685
Charge for year	27,220	40,183	3,047	70,450
At 31 March 2020	<b>319,891</b>	<b>471,021</b>	<b>17,223</b>	<b>808,135</b>
<b>Net book value</b>				
At 31 March 2020	<b>1,041,121</b>	<b>332,630</b>	<b>19,072</b>	<b>1,392,823</b>
At 31 March 2019	1,068,341	372,813	1,556	1,442,710

## Investments

	The Group		The Charity	
	2020	2019	2020	2019
	£	£	£	£
Market value at the start of the year	<b>399,394</b>	-	<b>399,394</b>	-
Additions at historic cost	-	400,000	-	400,000
Disposal proceeds	-	-	-	-
Unrealised (loss) / gains	<b>(34,735)</b>	(606)	<b>(34,735)</b>	(606)
Market value at the end of the year	<b>399,394</b>	399,394	<b>399,394</b>	399,394
Historical cost at the year end	<b>400,000</b>	400,000	<b>400,000</b>	400,000

All of the investment is held in UK Unit Trust Management units or cash.

## 10 Subsidiary Undertaking

The charitable company owns the whole of the issued ordinary share capital of Carers UK Trading limited, a company registered in England. The subsidiary remained dormant throughout the financial year. 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:

	2020	2019
	£	£
<b>Turnover</b>	-	179
Cost of sales	-	-
Gross profit	-	179
<b>Administrative expenses</b>	-	(1,400)
Other operating income	-	-
Profit / (loss) for financial year	-	(1,221)
<b>The aggregate of the assets, liabilities and funds was:</b>		
Assets	-	-
Liabilities	(3,451)	(3,451)
<b>Funds</b>	(3,451)	(3,451)

## 11 Parent Subsidiary

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

	2020	2019
	£	£
Gross Income	4,005,329	2,522,941
Results for the year	365,177	(658,549)

## 12 Debtors

	The Group		The Charity	
	2020	2019	2020	2019
	£	£	£	£
Trade debtors	1,309,263	451,015	1,309,263	451,015
Other debtors	4,029	9,794	4,029	9,794
Prepayments	34,058	25,522	34,058	25,522
Accrued income	96,912	91,231	96,912	91,231
	1,444,262	577,562	1,444,262	577,562



### 13 Creditors: amounts due within one year

	The Group		The Charity	
	2020	2019	2020	2019
	£	£	£	£
Trade creditors incl other creditors	35,690	20,932	32,239	23,161
Bank loans	47,232	45,953	47,232	45,953
Other Taxes & Social Security	313,812	156,262	313,812	156,262
Accruals and deferred income	635,239	312,606	635,239	312,606
	<b>1,031,973</b>	<b>535,752</b>	<b>1,028,522</b>	<b>537,981</b>

Deferred income	The Group		The Charity	
	2020	2019	2020	2019
	£	£	£	£
Balance at the beginning of the year	194,195	62,080	194,195	(62,080)
Amount released to income in the year	(194,195)	(62,080)	(194,195)	194,195
Amount deferred in the year	572,887	194,195	572,887	194,195
Balance at the end of the year	<b>572,887</b>	<b>194,195</b>	<b>572,887</b>	<b>62,080</b>

Deferred income comprises of income received for the State of Caring 2019 event and sponsorship for Carers Week, both of which occur after the year end.

### Creditors: amounts falling due after one year

	The Group		The Charity	
	2020	2019	2020	2019
	£	£	£	£
Loan payable due after one year and less than five years	256,640	249,686	256,640	249,686
Loan payable due after five years	369,138	423,324	369,138	423,324
	<b>625,778</b>	<b>673,010</b>	<b>625,778</b>	<b>673,010</b>

Bank loan totalling £673,010 (2019: £718,963) is secured by fixed charge over part of the charity's property and is also secured by a floating charge over the charity's assets. Term of loan is 15 years.

No discounting has been applied to the present value of the loan as the effect of this would be immaterial.

### 14 Analysis of group net assets between funds: current year

	Restricted funds	Designated funds	General funds	Total funds
	£	£	£	£
Tangible fixed assets	-	1,373,751	19,072	1,392,823
Investments	-	-	364,659	364,659
Net current assets	301,069	1,298,788	742,783	2,707,299
Long term liabilities	-	(673,010)	-	(673,010)
Net assets at the end of the year	<b>301,069</b>	<b>2,046,761</b>	<b>1,126,514</b>	<b>3,474,344</b>

## Analysis of group net assets between funds: prior year

	Restricted funds	Designated funds	General funds	Total funds
	£	£	£	£
Tangible fixed assets	-	1,441,154	1,556	1,442,710
Investments	-	-	399,394	399,394
Net current assests	185,030	1,391,973	363,070	2,339,467
Long term liabilities	-	(673,010)	-	(673,010)
Net assets at the end of the year	185,030	2,160,117	764,020	3,109,167

## 15 Movements in funds: current year

	As at 1 April 2019	Income	Expenditure	Transfers between Funds	As at 1 March 2020
	£	£	£	£	£
<b>Restricted funds</b>					
Information & Technology	-	80,200	80,200	-	-
Information & Advice	-	110,180	110,180	-	-
Carers Strategy	-	59,998	59,998	-	-
Communications, Campaigns, Media & Public Affairs	-	99,630	99,630	-	-
Sport England	-	57,401	22,801	-	34,600
Primary Care Navigator	10,345	-	-	-	10,345
Centrica	55,315	100,000	129,006	-	26,309
Accelerating Ideas Volunteering	-	50,000	104,946	54,946	-
Barclays	-	135,362	5,059	-	130,303
<b>Nation Offices:</b>					
Northern Ireland	-	124,526	186,806	62,280	-
Scotland	-	352,545	364,095	11,550	-
Wales	95,597	352,801	372,659	-	75,739
<b>Legacy Funds</b>					
West Sussex Carers Fund	23,773	-	-	-	23,773
<b>Total Restricted funds</b>	<b>185,030</b>	<b>1,522,643</b>	<b>1,535,379</b>	<b>128,775</b>	<b>301,069</b>
<b>Unrestricted funds</b>					
<b>Designated Funds</b>					
Reserve policy fund	-	-	-	-	-
Loan repayment fund	718,963	-	-	(45,953)	673,010
Office fund	1,441,154	-	67,403	-	1,373,751
<b>Total Designated Funds</b>	<b>2,160,117</b>	<b>-</b>	<b>67,403</b>	<b>(45,953)</b>	<b>2,046,761</b>
<b>General Funds</b>	<b>764,020</b>	<b>2,482,686</b>	<b>2,037,370</b>	<b>-</b>	<b>1,209,336</b>
<b>Trf to Office Funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(82,822)</b>	<b>-</b>
<b>General Funds</b>	<b>764,020</b>	<b>2,482,686</b>	<b>2,037,370</b>	<b>(82,822)</b>	<b>1,209,336</b>
<b>Total Unrestricted Funds</b>	<b>2,924,137</b>	<b>2,482,686</b>	<b>2,104,773</b>	<b>(128,775)</b>	<b>3,173,275</b>
<b>Total Funds</b>	<b>3,109,167</b>	<b>4,005,329</b>	<b>3,640,152</b>	<b>-</b>	<b>3,474,344</b>

## Movements in funds: prior year

	As at 1 April 2018	Income	Expenditure	Transfers between Funds	As at 1 March 2019
	£	£	£	£	£
<b>Restricted funds</b>					
Information & Technology	-	72,649	72,649	-	-
Carers Strategy	-	59,999	59,999	-	-
Innovation incl BDI database	-	46,300	46,300	-	-
Primary Care Navigator	10,345	-	-	-	10,345
Centrica	-	100,000	44,685	-	55,315
Accelerating Ideas Volunteering	11,058	50,000	98,830	37,772	-
Kensington & Chelsea	58,794	33,333	92,127	-	-
Accelerating Ideas Volunteering	63,644	110,052	162,638	-	11,058
<b>Nation Offices</b>					
Northern Ireland	-	137,374	161,287	23,913	-
Scotland	1,070	273,243	318,641	44,328	-
Wales	96,567	349,455	350,425	-	95,597
<b>Legacy Funds</b>					
West Sussex Carers Fund	23,773	-	-	-	23,773
<b>Total Restricted funds</b>	<b>142,813</b>	<b>1,089,020</b>	<b>1,152,816</b>	<b>106,013</b>	<b>185,030</b>
<b>Unrestricted funds</b>					
<b>Designated Funds</b>					
Reserve policy fund	410,118	-	-	(410,118)	-
Loan repayment fund	763,671	-	-	(44,708)	718,963
Office fund	1,508,557	-	67,403	-	1,441,154
<b>Total Designated Funds</b>	<b>2,682,346</b>	<b>-</b>	<b>67,403</b>	<b>(454,826)</b>	<b>2,160,117</b>
<b>General funds</b>	<b>975,970</b>	<b>1,434,100</b>	<b>1,994,863</b>	<b>348,813</b>	<b>764,020</b>
Trf to Office Funds	-	-	-	-	-
<b>General Funds</b>	<b>975,970</b>	<b>1,434,100</b>	<b>1,994,863</b>	<b>348,813</b>	<b>764,020</b>
<b>Total Unrestricted Funds</b>	<b>3,658,316</b>	<b>1,434,100</b>	<b>2,062,266</b>	<b>(106,013)</b>	<b>2,924,137</b>
<b>Total Funds</b>	<b>3,801,129</b>	<b>2,523,120</b>	<b>3,215,082</b>	<b>-</b>	<b>3,109,167</b>

**(a) Designated Funds**

<b>Office Fund</b>	This represents the net book value of the leasehold and improvements to the building at 20 Great Dover Street, London, SE1 4LX
<b>Loan repayment fund</b>	This represents the amount to repay loan commitments
<b>Reserve policy fund</b>	Relates to amount needed to in part meet reserves policy

**(b) Restricted Funds**

<b>Advice and Information</b>	Funding to support our carer support service including the helpline donated by Garfield Weston Foundation and Barclays Bank
<b>Carers Strategy</b>	Support from the Department of Health and Social Care Health and Wellbeing Alliance for Carers UK and Carers Trust.
<b>Communications, Campaigns, Media &amp; Public Affairs</b>	Funding to support the advice and advocacy work undertaken by Carers UK Limited to promote carers rights.
<b>Innovation</b>	Funding to assist in the development of programmes designed to assist commercial organisations in helping carers within their workforces.
<b>Primary Care Navigator project</b>	Contract to improve identification and support of carers within the primary care system within the boroughs of Westminster, Kensington & Chelsea and Hammersmith & Fulham.
<b>Centrica</b>	To enter into a mutually beneficial strategic partnership to improve the lives of Carers across the UK, as part of which funds and awareness are raised for Carers UK Ltd.
<b>Carers UK Accelerating Ideas Volunteering Programme</b>	To establish a new, integrated country-wide social action programme to enable carers and former carers to volunteer time to support carers. Funding for England and Wales only.
<b>Nation Offices</b>	This relates to funds held in respect of offices based in Northern Ireland, Wales and Scotland.
<b>Wales</b>	Funding from the Welsh Assembly and others in support of our work in Wales.
<b>Scotland</b>	Funding from the Scottish Parliament and others in support of our work in Scotland.
<b>Northern Ireland</b>	Funding from the Northern Irish Assembly, Health Boards and Trusts in support of our work in Northern Ireland.
<b>Branches: West Sussex Carers Fund</b>	A legacy left for the benefit of carers in West Sussex.

## 16 Commitments

The charity had annual commitments at the year end under operating leases relating to its Nation and Area offices expiring as follows:

	2020	2019
	£	£
Less than 1 year	-	1,261
	-	1,261

## 17 Related party transactions

There are no related party transactions to disclose for 2020 (2019: none).

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

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







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

Caring will touch each and every one of us in our lifetime, whether we become a carer or need care ourselves. Whilst caring can be a rewarding experience, it can also impact on a person's health, finances and relationships.

Carers UK is here to listen, to give carers expert information and tailored advice. We champion the rights of carers and support them in finding new ways to manage at home, at work, or in their community.

We're here to make life better for carers.

## Carers UK

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