



**Care and Share Companionship SCIO**

**Registered Charity No SC048873**

# **ANNUAL REPORT**

**January 1<sup>st</sup> 2023 – March 31<sup>st</sup> 2024**

**Version 1.0 (final)**

*This report now aligns with our financial year and is an extension of our previous Annual Report, which covered the period 1<sup>st</sup> January 2023 – 31<sup>st</sup> December 2023. Our future Annual Reports will also align with our financial year.*



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# Chairperson's Report

## Introduction

Care and Share is a community charity providing 1-1 and group befriending support to people over the age of 60 in the Kirkcaldy area who are living in social isolation and loneliness. Our vision is to provide personalised, flexible companionship to older people, who we refer to as our 'friends.' The befriending support is provided by volunteers who we match to our friends. We tailor our support to the needs of our friends, and we bring people together regardless of age or background, enabling relationships with each other and within communities. We are committed to challenging social stereotypes regarding older people and believe they should feel valued and respected, and supported to be active members of their community.

Care and Share operates from rented premises within Bennochry Parish Church in Elgin Street, Kirkcaldy. We are in the process of agreeing a move to new premises in Kirkcaldy, operated by Fife Voluntary Action. The planned date for moving is 1<sup>st</sup> May 2024.

## The Care and Share Team

During the period covered by this report, the central Care and Share team (excluding volunteers) comprised two employees and a Board of Trustees.

### Employee/s

A Volunteer Coordinator, Lorraine Simpson, was recruited in January 2023 to support Teresa Naylor, Care and Share's founder and Service Manager. In August, Teresa signalled her intention to retire, following which a recruitment process was undertaken to find her replacement. The title of Teresa's replacement would be Operations Manager. The Operations Manager recruitment process attracted several high-quality candidates, of which four were taken forward for interview. In September, Care and Share was delighted to confirm the appointment of Brenna Nyznik and, at the same time, Teresa kindly agreed to defer her retirement in order to support the induction of, and enable a managed handover to, Brenna. Also in September 2023, Lorraine Simpson unexpectedly resigned. Between November 2023 and February 2024, when she retired, Teresa undertook the role of Volunteer Coordinator, supporting Brenna in the role of Operations Manager. In December, 2023 Care and Share began the process to recruit a replacement for Lorraine and, in March 2024, Kim O'Brien was recruited (in a new role entitled Community Programme Coordinator) on a fixed term contract.

Throughout 2023 and into 2024, and notwithstanding the above changes in personnel and roles, Care and Share has continued to operate successfully, without disruption to its befriending support services. Indeed, the combination of Brenna's experience, energy and creative thinking, and Teresa's deep understanding of 'all things Care and Share' have strengthened Care and Share's operations and better positioned the charity for future growth. The Trustees are indebted to Teresa for deferring her retirement, at her own

volition, so that Care and Share might continue to operate throughout what would otherwise have been a very challenging time.

## Board of Trustees

Care and Share's Board of Trustees was strengthened by the appointment in July 2023 of Maureen Masson in the role of Secretary. Maureen has spent her career in higher education and is experienced in leadership and management. For the last four years she has been working in the role of Governance Officer at Edinburgh Napier University. She also worked for two years as Board Secretary in a Further Education College, so she understands the principles of good governance. Maureen is a welcome addition to the Care and Share team, and we're delighted to have her on board.

In March 2023, Lars Christiansen confirmed that he would like to stand down as Treasurer (and as a Trustee). A recruitment process was initiated in April 2023 and, after a long period during which no interest was expressed, Care and Share was pleased to appoint Tobi Obanisola as Treasurer and Trustee in February 2024. Tobi has worked as a financial analyst in a bank's Treasury function and is used to regulatory compliance and financial reporting. Lars is providing a handover to Tobi and has overseen the production of Care and Share's Annual Accounts to 31<sup>st</sup> March 2024. All involved with Care and Share are hugely grateful to Lars for his continued commitment to the charity.

As of 31<sup>st</sup> March 2024, Care and Share's Trustees are:

- Calum Stewart (Chairperson)
- Maureen Masson (Secretary)
- Tobi Obanisola (Treasurer)
- Lars Christiansen
- Eddie Mwiinga
- Eileen Spence
- Judy Hamilton
- Laura Lochtie
- Mairi McKay

## Governance

Governance of operational performance and financial probity – and the charity's general well-being – are the responsibility of the Board of Trustees, which is bound by rules that are set out in Care and Share's Constitution. The Board meets every 6 – 8 weeks. It reviews operational and financial performance and related reports that are submitted by the Service / Operations Manager and Treasurer respectively. The Board also discusses and takes decisions about other matters that arise from time to time, for example in relation to risks and issues, recruitment, financial reserves and funding. Minutes from each Board Meeting are documented and approved. Going forward, the Board will also be responsible for maintaining and delivering Care and Share's Development Plan.

Care and Share's employees are accountable to the Board of Trustees; they are not Trustees themselves although both Brenna and Teresa attend and contribute to Trustee Board meetings.

Fife H&SCP's Link Officer for CSC, Susan McLean, has also attended Trustee Board Meetings to ensure effective communications between the two organisations (Fife H&SCP being Care and Share's principal source of funds). Susan retired in December 2023; Care and Share would like to thank Susan for her support and encouragement over the last few years and is currently waiting for confirmation from Fife H&SCP of her replacement.

## Development Plan

A key initiative in late 2022 was to draft Care and Share's Development Plan, the purpose of which was to provide Care and Share stakeholders with, inter alia, a Trustee Board-approved plan for the charity's growth. The Development Plan was agreed in early 2023 but, in view of the above-mentioned personnel changes, has since been put on hold. Specifically, it was felt that Care and Share needed to focus on stabilisation and the transition from Teresa to Brenna, rather than growth. Further, that Brenna then needed time to consider the options and opportunities for growth, which she will have day-to-day responsibility for delivering. To achieve this Brenna first needs to fully understand all aspects of current operations and how they might be developed.

## Treasurer's Report

*This section covers Care and Share's financial year to 31<sup>st</sup> March 2024. We reported on our financial year to 31<sup>st</sup> March 2023 in our previous Annual Report, which covered the calendar year 2023.*

## Annual Accounts

Our Annual Accounts to 31<sup>st</sup> March 2024 were prepared and independently reviewed and approved. These summarised the income and expenditure associated with each of our Main and Reserve bank accounts.

Our Main account is used for all operating income and expenditure. We maintain our Reserve account so that, at any given time, it holds the equivalent of three months' operating expenditure for use in exceptional circumstances.

The funds (or income) in both accounts are deemed to be either restricted or unrestricted funds. Restricted funds are for use in accordance with the terms of the relevant funding agreement. For Care and Share Companionship this relates to the costs associated with running the charity and include, for example, salaries, office rent and heating, insurance, marketing and travel expenses. Unrestricted funds can be used for any purpose that Care and Share Companionship deems appropriate.

Our funding in the financial year to 31<sup>st</sup> March 2024 continued to be predominantly sourced from Fife Health & Social Care Partnership (Fife H&SCP), and we were grateful to receive some additional donations from local people and organisations. In total, we received income of £60,735.87 (compared to £60,103.73 in the previous financial year) of which £58,905.52 came from Fife H&SCP.

Total expenditure for the financial year to 31<sup>st</sup> March 2024 was 72,935.97 (compared to £58,808.58 in the previous financial year). This increase of £14,127.39 was mainly due to the additional, and ongoing, costs of employing a Volunteer Coordinator plus the one-off employment-related costs during transition / handover periods (as explained in the Chairperson's Report above).

At the end of 31<sup>st</sup> March 2024, Care and Share Companionship's bank balances were:

- Main Account £13,270.45. This excludes an additional £30,000.00, which has been placed in interest-bearing, six-month deposit accounts.
- Reserve Account £5,521.39. This excludes an additional £15,000.00, which has been placed in interest-bearing, six-month deposit accounts.

In summary, Care and Share's total funds at 31<sup>st</sup> March 2024 were £63,791.84.

We maintain a cash flow forecast, currently up to March 2026, so that we can plan ahead positively and understand the future cost implications of, for example, recruiting and supporting more volunteers and friends respectively.

## Operations Manager's Report

### Summary

*"If you associate enough with older people who enjoy their lives, who are not stored away in any golden ghettos, you will gain a sense of continuity and of the possibility for a full life."*  
– Margaret Mead.

In recent years our annual report has been largely determined by the challenges of running the organisation during the Covid pandemic, and the complex issues faced by many people as they began to cautiously attempt a return to 'normal'. Considering some of the health and wellbeing challenges facing many of our elderly friends, it is understandable that this process was and still is an ongoing journey for those who have not yet regained full confidence in rejoining their communities face to face. This factor has made our continued ability to offer befriending support and companionship to so many vulnerable elderly all the more important, and we are continuing to ensure that our support is led by the individual and collective needs of our friends and volunteers.

However, this lingering caution was accompanied by a fresh optimism and energy as services returned to normal and opportunities to engage within our communities increased once again. Our calendar of events is growing steadily, and the new Development Plan and

vision for expansion has created a platform to consider ambitious new directions. Additionally, the transition in management from Teresa to Brenna has been all the more successful due to Teresa's gracious decision to stay on in the position of Volunteer Coordinator following Lorraine's resignation. Brenna is extremely grateful to have had the extended time to benefit from Teresa's in-depth knowledge of the organisation and our friends and volunteers, who have also welcomed her into the community so warmly.

Our target numbers have fluctuated as per normal, but remain steady despite significant organisational transition, and as of March 31<sup>st</sup>, 2024, we:

- Have 23 active Volunteer Befrienders
- Support 49 Friends

Over the past 15 months we have supported in total:

- 47 friends through one-to-one befriending
- 16 friends through group befriending events
- 6 friends through telephone support
- 2 friends through shopping support

Between January 2023 and March 2024, we have provided approximately 2,219 hours of support, translating to a saving of £26,628.00 if we had employed staff at the Living Wage rate of £12 per hour. The savings noted do not include all other costs incidental to the provision of our service.

## Friends

We aim to challenge stigma and stereotype regarding the elderly and to help foster a greater sense of connection and wellbeing through 1-to-1 and group event Befriending. We endeavour to move beyond the image of elderly people as passive recipients of charity, to being seen as valuable members of the community.

From January 2023 through March 2024, we had 55 referrals. These have come to us through non statutory agencies and organisations, and friends and family of the referrals.

Out of 49 people we currently support:

- 8 people aged 60+
- 12 people aged 70+
- 20 people aged 80+
- 9 people aged 90+

We currently have 9 people who have been assessed and are waiting to be matched, and 13 new referrals who fit our befriending criteria waiting to be assessed.

As the need for companionship continues to outweigh the number of volunteers available to offer befriending, we are planning to explore creative new ways to support larger numbers

of friends beyond the 1-to-1 relationship, including more group events and social and personal development, peer to peer experiences. This will continue to consider the individual needs and preferences of friends, acknowledging that physical and mental health circumstances will determine the extent of their involvement and activity.

## Volunteer Companions

*'One person caring about another represents life's greatest value'—Jim Rohn*

Another impact of the Pandemic has been the effect on the volunteering community, with many organisations citing that it has become more challenging to recruit, train and retrain long or even short-term volunteers. Although the nature of volunteering means that numbers fluctuate, we have a core group of dedicated volunteers and our numbers have remained fairly consistent. Going forward we hope to join the Investing in Volunteers scheme, offer more opportunities for training and diversify the role to support creative leadership and personal development, tailored to the individual interests of the volunteer.

From January 1 2023 – March 31 2024, we have had:

- 41 volunteer general enquiries
- 15 new volunteer companions
- 6 volunteer resignations

## Calendar of Events

In addition to our one-one befriending support, we offer a calendar of events throughout the year to provide opportunities for our community of friends and volunteers to come together to honour seasonal, cultural and social celebrations. For many of our friends, this is also an opportunity to build their confidence in getting out and about and connect with their peers, making new connections in a safe and supportive environment. It is our intention to develop our calendar of events based on the interests of our friends, and to create not only outings, but new ways for them to become more involved with and connected to their communities.

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We kicked off our year with some sunny cheer nearing the end of a cold, dark and long winter as we organised a Scottish Social Afternoon. We invited both friends and volunteers along on Saturday 4 February 2023 to an afternoon of Scottish accordion music with a slight twist of a musical quiz. Bernie, the accordionist played several Scottish tunes. The challenge was to name the tune and mark the town/city on a printed map of Scotland to which it related to. There was lots of discussion, laughs and singing in the pursuit of finding the correct answer. We also had a few dancers in our midst who gave us a twirl of some well-known Scottish country dances.



To keep the Scottish theme, we served haggis and steak pies from a local butcher, Tom Courts, Burntisland with trifle for dessert and tea and coffee.



“Wonderful, wonderful afternoon. Thank you so much for all your hard work.” - Friend 80+

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The topic of our next social afternoon was Easter. We held tabletop Easter games which was optional for friends and volunteers to participate in. We were pleasantly surprised as to how many of our volunteers and friends did take part. We offered a light lunch with refreshments, and everyone took home an Easter gift bag filled with Easter delights and a bunch of Spring daffodils.



“What a different afternoon. Really enjoyed trying the games - not very good at them but it was a laugh” - Friend 70+

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In August we organised a Chips and Chat afternoon. We had a great turnout of volunteers and friends. Although it was simply about bringing people together for some delicious food and a blether we did have a few tabletop games if anyone was interested. It was apparent that everyone enjoyed the company and the superb food because there was a lot of chat and laughter. We invited our new volunteers to come along and get a flavour of what CSC is all about and give them an opportunity to meet our friends along with our volunteers. It was busy however our social volunteers along with a couple of board members did a great job

serving hot food and drinks. The fish & chips were supplied by K&K Fish Bar along with a few bottles of fizz. We then finished off with ice cream and a chocolate flake cup.

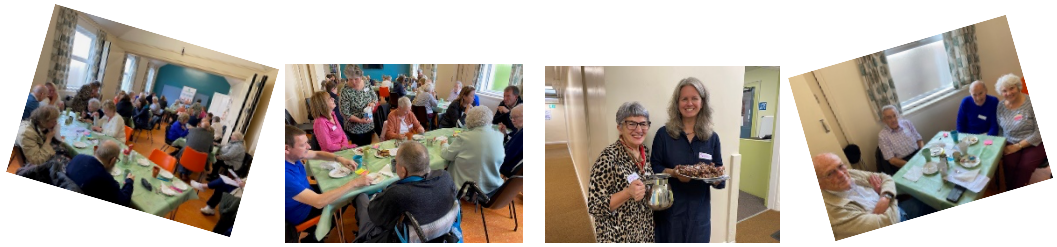


“You do such a grand job. I can’t thank you enough” - Friend 80+

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In mid-October we held a Coffee and Cake afternoon to introduce Brenna Nyznik, our new Operations Manager, to volunteers, friends and the organisations who make referrals to our service. This also gave Brenna an opportunity to meet everyone, find out a little about each other and begin building a rapport.

This was well attended by everyone with lots of delicious home baking, coffee, tea, and chat. Brenna was warmly welcomed and gave an insight into the future development and expansion of CSC. Plus, there were a few goodie bags taken home to be enjoyed later.



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We celebrated and thanked our loyal and wonderful volunteers twice, firstly for Volunteers Week in June we went ten pin bowling and then for Befriending Week in November we went to Cluny Clays to the golf driving range and enjoyed lunch at both events in collaboration with our friends from Crossroads and the Fife Carers Centre. It is an opportunity for all volunteers to get together get to know each other and have lots of fun.



“As always, a really good time. I think my bowling is improving”  
 “Have never tried golf before, think I hit a few balls in the right direction!”

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We had 28 people come along to our seasonal festive event. We invited friends and volunteers to share a Christmas Lunch prepared and served by the Olive Branch Café at Bennoch Church. We were not disappointed. The 3-course lunch and the company were fantastic. The volunteers from the café couldn't do enough to ensure we were all fed and happy. It was a time for CSC to catch up with friends and volunteers in a relaxed and happy atmosphere. We had the company of our Treasurer who met with a few new volunteers and friends. A lovely way to end 2023 and kick start the Christmas festivities.



“What a fabulous afternoon. Thank you for the invite.” - Volunteer  
 Thank you again for such a marvellous time, food was delicious as was the company”  
 - Friend 90+

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Ensuring our volunteers know how invaluable they are is important to us, as is providing opportunities for them to give feedback and input so that we can continue to improve and adapt our service. To ward off the post-holiday blues, we held a January Jolly Pizza ‘Feed’Back night on January 11 for our volunteers. We turned the Bennochy Church kitchen into a pizzeria and everyone had fun making their own pizzas. We then facilitated team group work sessions, so volunteers could share ‘Head, Heart, and Hands’ focused thoughts about CSC and offer feedback and suggestions for the future.



“Thank you both for organising the gathering last night. It was very enjoyable and informative. The peer support element is helpful while developing a feeling of community within the charity” - Volunteer

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Following the success of our first-ever Burns celebration last January, we’ve decided to make this a CSC tradition and held our ‘Blethering Burns’ celebration on Saturday, January 27. It was an enormous success, with a traditional piping in and ode to the haggis, a bagpiper, highland dancers, poetry reading, plenty of tartan, and a selection of traditional Scottish Burns treats including fresh haggis and steak pies from Tom Courts Butchers and traditional puddings.



“You truly smashed it from your warm welcome to the food, piper, address to the haggis and the dancers. It was truly super. ‘E’ phoned his niece as soon as he got home to tell her all about it. It was wonderful to see how it energized him (and all the other friends from the look on their faces). Thank you from the bottom of my heart.” - Volunteer

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## Future Plans and Challenges

*“Treasure the wisdom of old age. Learn from elder people and be wise.” – Lailah Gifty Akita.*

We are deeply grateful to our funder Fife Health and Social Care Partnership for their ongoing support. We are a young organisation with strong foundations, established only the year before the Pandemic and are in a period of exciting transition and potential for growth. Having consistent, reliable funding is essential during this time and we would not exist without FHSCP’s support for our work with the elderly.

Although loneliness and isolation can have detrimental effects on the health and wellbeing of the elderly, the pandemic also taught us that it affects people of all ages and backgrounds, and studies show it is one of the fastest growing social challenges we face. We currently have a waiting list for volunteer befrienders, and the demand is increasing. We are interested in what this could mean for future generations of elderly people, and the opportunities which exist for education, advocacy, and collaborative partnership work as potential preventative measures alongside our befriending programme. We intend to revise our development plan to identify challenges and create innovative new programmes and partnership opportunities, and secure significant additional funding in order to grow our team and operations to support increasing numbers of people living in isolation across Fife and beyond.

Future plans and challenges include:

- Securing ongoing, multistrand funding to allow us to continue to grow and improve our service throughout a wider area of Fife and beyond.
- Developing our intergenerational approach and identifying preventative measures against isolation and loneliness among a new generation of elderly people.
- Recruiting more volunteers and increasing the diversity of our volunteer team, including males, students, minority groups, people with additional needs, and those who are unemployed or returning to work.
- Revising our Development Plan to reflect growth ambitions and secure funding.
- Creating new website / database / IT platforms.
- Leasing a central and larger professional office with opportunities to offer a drop-in service and access to more activities and services for friends and volunteers.
- Developing our volunteer training and development programmes and opportunities.
- Joining the Investing in Volunteers / Quality in Befriending award scheme.
- Revising our Governance policies and procedures including referral criteria.
- Developing and strengthening partnerships, including international projects working to address the growing global challenge of isolation and loneliness.
- Continuing to grow friendships with local community groups where mutual interests are identified and shared.
- Challenging stigma and stereotype regarding the elderly and collaborate with friends and their families, stakeholders, and partners, to identify new approaches that better recognise the unique contribution elderly people can make within their communities and wider society.

## Gratitude and Thanks

Care and Share Companionship could not continue to grow, develop, or operate efficiently and effectively without the commitment and support provided from a wide range of organisations, friends, and the local community. We would like to thank all those who have contributed and supported us throughout these past 15 months and are incredibly grateful to:

- Our funder, Fife Health & Social Care Partnership including our recently-retired Fife H&SCP Link Worker Susan Mclean.
- Our Board of Trustees, who contribute their time, expertise and dedication, to ensure invaluable support for our staff, volunteers and friends.
- Fife Voluntary Action for their guidance, training courses, events and prospective volunteers.
- Volunteering Scotland for guidance on all aspects of volunteering and PVG Disclosure.
- Disclosure Scotland for guidance and clarity.
- Befriending Networks' excellent advice and support in all aspects relating to volunteering.
- Generations Working Together for their support and expanding our knowledge of intergenerational work.
- Flinriver our new website designer and Michael McLaren for his support with our current Wix website platform.
- Business Gateway Fife for their advice and business support.
- Scottish Tech Army for their guidance on developing our new upcoming IT platform.
- Social Services for advising and working with us to support some of our friends
- Fife Forum for their continuing support and advice.
- RVS Community Companions for providing transport when required.
- Bennochty Church members who continue to support us and maintain our office within the building including security measures to ensure we feel safe.

Donations gratefully received from:

Mr James Watson  
Mrs Irene Nicol  
Miss Margaret Kirk  
Bennochty Church Ladies Group  
Sorooptimist Ladies Group

And finally, a huge and very special 'thank you' to our wonderful and most valued Volunteer Companions, many of whom also donate their travel costs back to us to support our work. We say this often, but because it is true - without our volunteers, Care and Share Companionship could not function as a support service to people over 60 who live in isolation and loneliness. We are deeply grateful for the time, commitment, loyalty and friendship they give freely and from the heart.