



Annual Report

2020-21

Includes

TRUSTEES' ANNUAL REPORT AND ACCOUNTS
for the year ended 31 March 2021

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 recognises, 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 – we want to make life better for carers.

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.

Contents

4	<i>Strategic Report</i>
4	Chair's statement
6	Chief Executive's statement
9	Vision 2021 - five years in the making
10	Battle for greater understanding and support for carers in our society
14	Being there for carers with information and advice, right from the start
18	Building a network of carer-friendly employers
22	Growing income streams to increase our impact in 2020/21
26	Being a great place to work and volunteer
28	Make the best use of technology to work effectively and respond to changing behaviours
30	Looking ahead - <i>Vision 2025</i>
33	Thanking
34	<i>Report of the Trustees and Accounts</i>
34	Legal and administrative information
38	Financial statements 2020-21
38	Financial review 2020-21
41	Independent Auditor's report
44	Consolidated statement of financial activities
45	Balance sheet
46	Statement of cash flows
47	Notes to the financial statements

‘Building on our work and heritage to meet the challenges of the future’

It was a huge privilege to take over as Chair of Carers UK from David Grayson in October 2020 and I look forward to playing my part in the critical challenge of supporting unpaid carers. I do so as someone who has caring responsibilities and has experienced the benefits of a carer friendly workplace. This has made me determined to help put the issue front and centre of government, employer and NHS concerns. I want to pay tribute to David for his tireless support for the cause over the last eight years and to thank the Board and Executive team for their commitment and effectiveness over what has been an exceptionally challenging year for carers.

The pandemic has had a massive impact. Our survey work has shown that it has significantly increased the burden on existing carers as well as creating many new ones. Unfortunately, this impact will not be temporary. What was already a major social and economic issue has just got bigger. It affects us all. To give one example, a recent NHS England survey suggests that one in three of their 1.2 million staff are juggling work and an unpaid caring role, many more than previous surveys have indicated. This makes the work Carers UK does to raise awareness of the challenge, campaign for greater support for carers, and signpost to the support that already exists, even more important.



To do this, Carers UK needs to be financially resilient, well connected externally and effective as a team. Under Helen Walker's leadership, we are making progress in all these areas. Our income grew last year in a very difficult environment for fundraising and we are immensely grateful to our individual and corporate donors and volunteers. We have strengthened existing partnerships and developed new ones. We are very excited about our new partnership with Virgin Media which we believe can make a huge and lasting difference in connecting carers. We have grown our membership, and the membership of Employers for Carers which is a great sign that more and more organisations are recognising the value of carer friendly workplaces. We have improved our digital engagement with carers and supporters.

This provides a great platform for the future. We have launched our new strategy from now until our 60th anniversary, *Vision 2025*. It is ambitious and urgent as it needs to be. It is about working to make life better for the huge number of individuals who are carers now or who will become so in the future, both to make us a more cohesive society and a more resilient economy. Everyone at Carers UK will be throwing themselves into this in partnership with our supporters. Please join us.

A handwritten signature in blue ink, appearing to read "NICK BAIRD".

Nick Baird - CMG CVO
Chair

‘A year where the additional toll on carers made our work even more vital’

When I wrote my foreword to last year’s Annual Report, the arrival of COVID-19 in the UK was still relatively recent. While we knew that unpaid carers were already experiencing negative impacts on their lives and wellbeing, the many ways that they would be affected and the sheer scale of the emotional, financial and health consequences still lay very much ahead of us.

For many unpaid carers there was an immediate additional set of stresses added to their lives which had already been near breaking point. To protect the most vulnerable, shielding was introduced, meaning that for more than 12 months many have found that they have effectively been housebound – including carers who have had to avoid any opportunity of infection which could either prevent them from being able to care for the person closest to them or introduce the virus into the home. Access to Personal Protective Equipment was not immediately available for carers – and even shopping for food and essential supplies could be incredibly difficult, either in person or online. Services such as day centres were closed or moth-balled overnight, meaning that more people had to take on caring responsibilities – and opportunities for breaks or any respite care virtually vanished. Many juggling work with care faced loss of employment, some due to their caring responsibilities increasing dramatically while for others the pandemic had a negative effect on

the business they were working for. And as the health and emotional toll of dealing with the effects of the pandemic on a day-to-day level became felt, so too did the financial impact for many unpaid carers, particularly those in receipt of the meagre Carer’s Allowance.

Carers UK’s clear priority was to be both decisive and nimble in our response to the coronavirus crisis. We had to ensure the needs of unpaid carers were recognised and acted upon by the government, health and social care providers. Throughout the year, as the effects of the pandemic have brought new challenges – whether the introduction of lockdowns and support bubbles; the changing advice on keeping ourselves and others safe; new legislation including relating directly to carers; the reduction in front-line and other support services; or the positive news about the developing vaccination programme and ensuring carers had early access to receiving it – we have worked tirelessly to understand the impact and the immediate and long-term issues for carers. We then developed plans to create positive and lasting benefits. And as we enter the second year of the pandemic, we are determined to recognise the techniques we used to create change at speed, measure the impact of what we’ve achieved and build on this to make life better for carers.

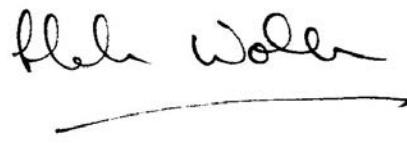


As a charity reliant on fundraised income, the year also brought the challenge of being able to raise sufficient funds to match increased demands from our beneficiaries. As it became impossible for challenge events to go ahead, many charities saw substantial hits to their income across the year – and we had to change some of our planned activity. But through the work undertaken in the previous year we had built a foundation that stood us in good stead for building on existing, and developing new, relationships. I am proud to say that we were able to beat our financial targets and increase voluntary as well as earned income in such a challenging climate.

This need to understand a fast-changing environment, how severe and long term the impacts have been on carers and the responses from government and other key organisations– has informed our thinking on *Vision 2025*. This ambitious Direction of Travel sets out a framework to fundamentally change the lives of carers for the better by our 60th anniversary.

With so much turmoil and change throughout the year, I'd like to extend a special thank you to every unpaid carer who took time to complete our research, take part in insight panels, share their stories, engage with us on social media or via our members' forum, or the many other ways they helped us collect information to paint the truest picture of caring during the pandemic which has been so essential in our work on their behalf. I'd also like to acknowledge the exceptional flexibility and hard work of the Carers UK team in adapting to working from home.

We are not through this yet, but I am confident that Carers UK will continue to strive to make life better for carers, wherever they may be and however caring affects them. I am hugely excited about the ambitious plans we have in place and, despite the many challenges, believe this year will see us delivering more for carers than ever before, across all four nations.

A handwritten signature in black ink that reads "Helen Walker". A thin, curved black arrow points from the end of the signature towards the text below it.

Helen Walker
Chief Executive



Vision 2021 – five years in the making

In 2016 Carers UK published *However caring affects you: our vision for 2021*, outlining the challenges that were facing unpaid carers throughout the United Kingdom and our plan to create changes that would benefit their lives. Many carers were stretched to their limits, struggling to make ends meet while looking after someone, often neglecting their own wellbeing in the process. We saw that all too often, the right help and support wasn't available – or that carers didn't know where to turn to for reliable and accessible information. And we saw that carers were overlooked, their needs unrecognised, with the care that they provided taken for granted.

In the five years since, we have brought about many improvements for carers – placing the reality of carers experiences at the heart of the political agenda; making our information and support more easily accessible, always driven by the needs of carers; and creating networks of carer friendly employers who recognise and support staff who are juggling work with caring responsibilities.

The sudden onset of the COVID-19 pandemic created a myriad of additional challenges, with millions of people suddenly finding themselves caring for someone; a health crisis which put even more pressure on unpaid carers and those they look after; and immediate and far-reaching changes to health, social care and support systems that impacted their lives enormously.

Battle for greater understanding and support for carers in our society

What we said we'd do in 2020/21:

- 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.

The impact of the coronavirus pandemic on unpaid carers throughout the UK was immediate, profound and with effects likely to last long into the future. As cases started to increase across the UK and each of the nations' governments started to consider what actions they would take in response to the pandemic, it was essential to ensure that unpaid carers were recognised, their concerns understood, and their needs factored in to both short and long-term planning and legislation. We listened to carers and acted on their concerns, worries and needs in order to secure change.

Carers UK set to work to identify how carers would likely be impacted; whether physically, emotionally, financially or in many other ways and began planning how best to help people through this unprecedented situation.

Within two weeks of the release of the first draft of emergency legislation, we had read, interpreted, commented on the document, and written four briefings on the topic, in order to influence the eventual legislation. This need to respond quickly, but with insight and authority, has been paramount throughout the crisis.

The image shows two rectangular reports from Carers UK. The top report is titled 'Caring behind closed doors' and 'Forgotten families in the coronavirus outbreak' from April 2020. It features a collage of five small photos showing various scenes of family care. The bottom report is titled 'Caring behind closed doors: six months on' and 'The continued impact of the coronavirus (COVID-19) pandemic on unpaid carers' from October 2020. It also features a collage of five small photos showing similar scenes of family care.

Caring behind closed doors was the first research in the sector taking in the views of carers and still remains the most detailed evidence base on carers, including the fact that the research focussed on two points in time. It showed how carers' priorities changed and how we have worked to match those priorities and concerns as they have shifted and changed throughout the pandemic. We are incredibly grateful to all those carers who completed the survey.



Caring behind closed doors

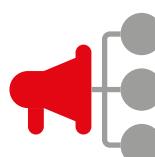
In early 2020, the lives of unpaid carers were already being impacted by the pandemic and part of Carers UK's response was developing and launching a survey for carers to share what they were experiencing in real time, gathering information that could be used to strengthen the case for what was needed to support carers and protect those they care for. The first report on the findings, *Caring behind closed doors*, was launched in April and showed how the majority of carers were providing more care than before; how the need for self-isolation or shielding combined with the closure of local services was affecting carers; and how many were facing difficulties accessing food and other supplies necessary for caring, increased costs on supplies and bills, and changes to working patterns for those who were juggling paid work and care. The picture painted was of an increasing pressure on carers, many of whom were providing substantial hours of care every week and were already frustrated, anxious or exhausted.

Where each of the four home nations were taking different stances concerning the needs of carers, we compared all proposals to identify emerging best practice and promoted uptake of these approaches across borders. The report contained both short and long-term recommendations for the UK Governments, key public bodies, and others to implement, and although some have yet to be acted upon (an increase to Carer's Allowance is still at the heart of our Fairer for Carers campaign), many were delivered as a result of the compelling evidence contained within the report and the campaigning of Carers UK.

Following the *Caring behind closed doors* report the Scottish Government announced an additional payment of £230 to people due to receive the Carer's Allowance Supplement in June 2020, taking the total additional payment for those eligible for Carer's Allowance in Scotland to £690 for the year.

Six months after conducting the initial research we undertook a follow-up study to see how the situation for unpaid carers had changed, resulting in *Caring behind closed doors: six months on*. These findings showed that as the coronavirus pandemic continued, new issues were arising, and Carers UK asked the government to:

- make sure that carers can take breaks and that the return of essential services is prioritised
- provide clear guidance, information, and advice specifically for carers
- raise the level of Carer's Allowance
- support carers to look after their own health and wellbeing, and provide targeted funding for carers mental health support
- ensure that carers are better able to juggle work and care and remain in work
- provide sufficient funding for social care over the winter.



700.5 million
estimated media reach across the UK



Working with the UK and Nation Governments and other bodies

Throughout the year we have consistently made the voices of carers known to the UK and nation governments detailing how those lives which were often already at breaking point have been affected; how much they have been doing to keep life going in extraordinary circumstances; and what is most needed to ensure they can continue. Through the evidence gathered, the stories of actual carers in crisis and our close connections with government, NHS and other stakeholders, we have achieved getting unpaid carers considered in major decisions – and will continue this with our public campaigning; influencing work; manifesto requests ahead of elections in Scotland and Wales; and through our work with the media, to share the experiences of carers and the additional pressures that they have been living with in the past year. In Northern Ireland a Carers ID card was introduced to allow for travel and exercise during lockdown and priority access to shopping at major supermarkets.

Unseen and undervalued

For Carers Rights Day, we unveiled astonishing findings from our new research that showed that unpaid carers were saving the state a phenomenal £530 million, every day – or within the preceding eight months a total of £135 billion. With 81% of carers having taken on more care since the start of the pandemic and nearly two thirds worried about how they would continue to manage over winter, we called on the government to urgently review and invest in carers' breaks services as a lifeline for so many. We also asked for an increase in Carer's Allowance to match that made to Universal Credit. This would help carers providing 35 hours or more of unpaid care each week manage both the higher costs of caring in the winter and the lack of services available to help them stay in work. Through this and the recommendations from both *Caring behind closed doors* reports, Carers UK urged the government to deliver a New Deal for Carers in the medium term - having given so much during the pandemic, the government now needs to give back to carers.

Count Carers In – the 2021 Census

The 2021 Census took place in England, Northern Ireland and Wales on 21 March and we needed to stress the importance for all unpaid carers to answer the question on whether they provide unpaid care and for how many hours, as this data would inform the provision of services for years to come.

With messages to all of our members to Count Carers In, briefings for all our Employers for Carers members, affiliates and partners to spread the word plus a social media campaign running up to and beyond the census date, we were also able to utilise our new partnership with Virgin Media who, in association with us, ran a co-branded Count Carers In campaign reaching millions of customers through their TV platform, website, email and SMS communications, as well as boosting reach via social media activity to millions more people.



Priority

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

What we said we'd do in 2020/21:

- 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.

The coronavirus outbreak caused an immediate and urgent need to update existing guidance to reflect the ever-changing situation, ensuring that we were a trusted source of information and support through exceptionally testing and confusing times. New digital content was created that could be updated daily, or in some cases hourly, as governmental, and other advice was released, and our library of information was signposted to from sources including the government, health boards and other charities. Across the year there were more than 3.2 million page views of our online advice and information including three quarters of a million views of our new COVID-19 specific webpages. We also mailed all of our members identified as without an email address to make sure they were aware of routes to access information and support if they were not using digital channels.

Our social media channels were used to spread the word and direct people to the help and advice pages of the website, seeing a 600% increase in traffic in the first month of the outbreak. As new facts have emerged or guidance has been changed, it has been vital to respond with accurate, clear information regarding the issues that carers have been dealing with, whether regarding safety and infection controls including access to Personal Protective Equipment for carers, firstly in Scotland and then England; being able to safely purchase groceries or accessing priority shopping online or in supermarkets which we worked with DEFRA to ensure; through to the emotional impact of not seeing those closest to them or the devastating impact of COVID-19 on those accessing either day or residential care services.



3.2 million
views on the help and advice
section of our website



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

Our Helpline services and Listening Support

There was an immediate and massively increased demand on our Helpline services due to the outbreak, and with the need to rapidly increase our capacity we secured additional funding from Centrica, the Department of Health and Social Care, the Sun Readers' Fund, the Department of Health in Northern Ireland and others to do so. We increased the opening hours of both the national Helpline and our Adviceline in Northern Ireland whilst boosting our capacity for answering online enquiries across both services.

As the UK entered its first lockdown, we swiftly introduced a service to identify the most vulnerable carers and call them by telephone to check that they were okay, ensure they knew that someone would stay in contact with them, and be there to listen to their many concerns. The learnings that we took from this activity showed there was likely to be an ongoing need to offer support in this way and informed our plans for a new service for carers, offering Listening Support via telephone. Work was undertaken with key stakeholders to plan and build a service of trained volunteers to be matched with carers requiring additional support across a series of telephone calls. Funding from Barclays LifeSkills, the Welsh Government and the Marie-Louise von Motesiczky Charitable Trust has made possible the development of this exciting and much-needed service, including all associated telephony and training requirements, to launch in 2021.



20,391

calls answered by our UK telephone Helpline



3,300+

contacts responded to by Carers NI helpline

New ways to support carers

An early and devastating casualty of the coronavirus crisis for many carers was the closure of face-to-face services, initially as part of lockdown restrictions, but with many ultimately being mothballed for months or unlikely to open in the future. In response, our Carers Wales team started to offer online 'meet-ups' for unpaid carers known as Me Time and this has been expanded across all nations to include our weekly chat-based Care for a Cuppa sessions, through to Share and Learn workshops which have included sessions on health and wellbeing, creative skills, talks from authors on their caring experiences through to sing-along or yoga sessions. Carers Wales continued to innovate with Carer Wellbeing days and more localised sessions have also been hosted in Northern Ireland and Scotland.



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

Getting carers recognised as vital in helping protect the most vulnerable

At the start of the global health crisis, it was impossible to predict that within a year of the first recorded cases in the United Kingdom there would be a mass vaccination programme being rolled out to everyone. But with the announcement that the different vaccines were passing through testing it was imperative to supply evidence to the government that unpaid carers should be considered a priority, to help protect not only the person they were caring for, who in many cases may have been shielding, but also to guard their own health and ensure continuation of their caring. This required acting on multiple fronts, with influencing policy makers being key plus a campaign to carers to keep them informed of latest information, reinforcing the importance of getting vaccinated, and ensuring that when the call came for vaccinations, that they were recognised as carers and invited to receive their jabs.

On 30 December the Joint Committee on Vaccination and Immunisation (JCVI), which covers all four nations, confirmed that unpaid carers were included. What followed has been the biggest ever programme of carer identification in each nation. Carers UK, Carers Wales, Carers Scotland and Carers Northern Ireland worked closely with the NHS and the nation governments to get the guidance and processes in each nation right, identify carers, promote take-up of the vaccine and ensure that as many carers as possible were included in the definition. Additionally we worked to ensure that unpaid carers would have early priority access to testing, alongside key-workers. Carers' feedback has been overwhelming – with many feeling recognised properly for the first time, as well as reducing their anxiety and stress.

Carers Week - Make Caring Visible

Carers Week produced the first ever picture of the huge rise in caring and the volume of people who were new to caring. The figures of 13.6 million unpaid carers during the pandemic with 4.5 million new to caring have been used by politicians, decision makers, sector planners, etc and have helped illustrate the picture of caring – it has been a hugely important and influential piece of work, understanding those new to caring and the sheer impact on carers' lives and what is needed to provide them with vital information and support.



Priority

Building a network of carer positive employers

What we said we'd do in 2020/21:

- reach more employers and help them support more carers in their workforce through growing and rolling out Employers for Carers (EfC), 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

For those juggling work with their caring responsibilities, the pandemic has created many additional concerns. Social distancing measures meant that many businesses and other organisations struggled to continue to operate while all sectors have seen fundamental changes to how they work.

We surveyed carers who said they had been working before the coronavirus crisis and a fifth reported either having lost or given up their job or being unable to work because of the social distancing rules or measures their employers had put in place. Those that were no longer working were likely to have seen dramatic reductions in their income, compounding already difficult situations.

In the autumn we surveyed EfC member organisations to ask them about the impact of the COVID-19 pandemic on carers in their workforce, how they have been supporting them and emerging plans for recovery and return to work. We presented the *Supporting working carers in COVID-19* report at events held by the Eurocarers Research Working Group and the International Alliance of Carers Organisations (IACO) in December.



funded by the Scottish Government



Growing nations of carer friendly employers

In previous years, our calendar would have been full of events for employers interested in joining Employers for Carers (EfC), understanding how they can provide access to our Digital Resource for Carers (DRC) platform or with our team engaging directly with their employees. And although face-to-face sessions have been made impossible, the team switched to engaging online and have had a hugely successful year in encouraging more organisations to become carer friendly.

During Carers Week we announced that all 42 NHS England Integrated Care Systems (ICS) and Sustainability and Transformation Partnerships (STP) were now able to access the EfC and DRC online platforms and ran sessions to introduce them to both, including tips on rolling out the resources; case studies from engaged NHS Trusts; as well as a tailored toolkit to support key contact leads. With 33% of NHS employees having caring responsibilities outside of work, this relationship means approximately 250,000 employees across the NHS in England now have direct access to our information. In addition to being able to offer this support in a year when they have had to respond to such increased pressure, this will also help them recognise potential carers using their services.

And even though many companies have focussed on their responses to the pandemic, our quality assurance scheme for organisations and their employees, Carer Confident, continues to grow rapidly, going from 14 organisations accredited across the three levels of Active, Accomplished or Ambassador at the start of the year, doubling to 30 at year end with a further five organisations having applications pending.



232

members of Employers for Carers employing 3.7M people



12

members of Employers for Carers in Wales employing 100k people



207

Carer Positive employers employing 449,385 people



30

Carer Confident accreditations



The benefits of flexible working

With many people's jobs affected during the pandemic the need to be supportive in offering flexible working has never been greater. We released our new guide, *Let's talk about flexible working*, and a series of accompanying short films to help working carers feel more confident in discussing the benefits of working more flexibly to balance their care requirements and ensure that they are able to stay in employment. With tips on 'where you should start', 'how to communicate your request well' and 'debunking the myths', these resources were made possible through our partnership with Barclays LifeSkills and feature carers sharing their stories as to how they've found a balance between working and caring.

Providing educational support online

This year saw a sudden increase in employees needing to work remotely, either some or all of the time, and in response we were proud to add to our portfolio of e-Learning resources two new courses. Our 'Carer Aware' course was supported by NHSE/I while our 'You and Your Wellbeing' course was funded by Bupa UK Foundation.

Carer friendly companies and recognising their vulnerable customers

Looking after the day-to-day affairs of the person that they are caring for is often essential: whether paying their bills, accessing services or benefits, updating details or organising repairs – but this can be a difficult experience with carers telling us that dealing with companies who do not understand their needs or the reality of what they are dealing with can be frustrating, pushing many carers already facing stressful caring responsibilities to breaking point. Through both a survey and hosting insight groups with a focus on carers without a Power of Attorney or Deputyship, or carers who already had a formal arrangement in place, we researched the experience of carers and what organisations could do to make carers feel understood and valued, and how to implement systems and processes to make things easier where a carer was acting on behalf of someone else.

This builds on our work with Centrica and others to help recognise carers among their customer base; what can be done to ensure their needs are understood and acted upon; and how the lives of carers can be better understood by their customer service and other teams.



Growing income streams to increase our impact in 2020/21

What we said we'd do in 2020/21:

- strengthen our ability to accelerate our fundraising across a challenging and rapidly changing financial landscape, remaining flexible in our approach 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.

Preceding years had been challenging for many charities, but the immediate effects of the pandemic hit the ability to fundraise significantly and areas of income that were being counted on failed to materialise for many. Having done significant work in the previous year ensuring we had solid foundations for our fundraising, the team were able to respond quickly to the changing environment. They focused on identifying potential funding channels that fitted best with the most urgent needs of unpaid carers during the coronavirus crisis.

While some of our existing plans had to be put on hold in the short to medium-term, including launching our legacy programme and our work with major donors, it is of great testament to not only our fundraising team but across the organisation that we were able to increase our voluntary income, vital to meeting the increased demands throughout the year and for the foreseeable future. Additional funding from DHSC and Centrica allowed us to increase and maintain our extended Helpline opening hours, while a consecutive year's independent education grant from Seqirus allowed us to promote the importance of getting a flu jab once again to carers, particularly considering other risks of infection.



Finding new partners to work with

While we had conversations with many existing funders to share how unpaid carers were being dramatically affected by the pandemic, we also identified new organisations who were interested in partnering with us, either finding ways to tie in what was core to their offer with the needs of carers, or through helping them recognise the importance of everything that carers do and making the case as to why they should fundraise for Carers UK. The multi-channel lifestyle brand, FatFace, launched a range of face coverings with 100% of the profits being donated to us, which were an immediate sell-out, requiring a second range to be launched in the spring – while Foxy Bingo created a Carers UK room where customers knew that a donation was being made as part of the proceeds of each game played.

Being able to grow our initiatives to meet demand at speed

Having identified across the charity the many ways in which we could support carers throughout the crisis, it was essential that we could rapidly build on the success of our initiatives to meet demand. With our online ‘meet-ups’ quickly reaching capacity and the feedback being so positive as to how, for a few hours every week, carers were able to take some time for themselves whilst feeling less alone, it was through a COVID-19 related grant from the National Lottery Community Fund we were able to ramp up delivery of our Share and Learn programme, upgrading the systems we use to make them more fit-for-purpose; engage with external providers to broaden the range of sessions available including programmes that ran across multiple weeks; being able to promote and target to attract new and harder-to-reach audiences; and to be able to invest in greater impact analysis; this programme continues to build as we use our insight to develop nation specific sessions.



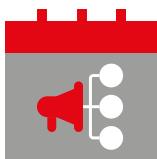
Growing income streams to increase our impact in 2020/21

The Telegraph Christmas campaign

Following an application highlighting how hard-hit unpaid carers had been throughout the crisis, one of the highlights of the year was being chosen as one of four charities supported by the Telegraph readers Annual Christmas Appeal which allowed us to share the real-life stories of carers and the extraordinary additional challenges that they had faced. Across the Telegraph's various titles, both print and online, 18 stories were shared by carers that we had identified, a total of 27 articles mentioned caring - and in response their readers donated over £835,000 to be divided among the four charities, including £124,000 in a single day in December when they ran their annual charity phone-in. We are thankful to all who made a donation, large or small, and to the Telegraph for helping share key information as to the reality facing unpaid carers and the help and support available from Carers UK.

The beneficial effects of our statutory funding

Teams continued to make the case for the importance of continued statutory funding from the governments in each nation. This funding provides us with security as to be able to maintain delivery for the future. When combined with our other income streams, this allows us to plan for the ongoing effects of a health crisis which has no immediate end in sight.



33 million+
estimated media reach for
the Telegraph Christmas Appeal



Priority

Being a great place to work and volunteer

What we said we'd do in 2020/21:

- 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.

It is of great testament to all Carers UK staff as to how they have responded to the changing circumstances we found ourselves working in throughout the year. A culture of mutual support and information sharing has been in evidence, with new cross-organisational teams forming to deliver our response to the coronavirus pandemic. The challenge of needing to rapidly deliver projects or reprioritise those already in development, has been met by all departments, keeping the needs of unpaid carers central throughout.

Although we had moved to remote working in mid-March of 2020, like many others we anticipated that there would be some movement towards a phased return to our offices – but the entire year was spent with all staff following governmental guidelines to continue to work remotely. Yet throughout that time, whether led by initiatives from the senior management team or by members of staff creating ways of keeping each other supported and motivated, everyone has respected the importance of looking after ourselves while delivering for carers.



904

total number of active volunteers



37,429

members of Carers UK



Volunteering in the digital world

The pandemic meant an immediate move away from existing forms of face-to-face volunteering to identifying new ways that we could be there for unpaid carers, and our volunteers understood this and embraced these new opportunities. Building on the work of our social media volunteers, we looked to broaden their remit and recruit new participants to help us spread-the-word, digitally, as Online Awareness Raisers with new materials to help train and support them. And while much of the work focussed on how we could be there virtually, our volunteers also made direct calls to vulnerable or digitally excluded carers, reaching out to offer support by phone.

Supporting and building our staff team

Following on from the development already undertaken to ensure that Carers UK is a good place to work, this year we provided an enhanced programme of online sessions including looking after our health and wellbeing, financial planning, and hearing from other people's experiences, alongside our first virtual staff conference. We have implemented new processes to ensure our recruitment of staff is fairer to all including anonymising all applications through shortlisting - and have recognised that for those new staff who have joined whilst we have been working remotely, the challenge has been to ensure they feel both informed and welcomed as part of the Carers UK family.

Our new strategy and values

Work was already underway to reflect on the achievements of *Vision 2021* and what was now needed to deliver our mission to make life better for carers, when it became clear that the outbreak of COVID-19 was spreading globally and that this would have a profound effect on the lives of unpaid carers. Although it was impossible for anyone to be able to fully understand how this would impact in both short and long term, it was clear that Carers UK needed to be agile in responding to new challenges, forthright in asking for what was needed to support both carers and those they look after, reactive to what carers were saying were their emerging priorities and ensure that in a challenging climate we would have the financial support in place to match our ambition. The organisation lead by the Board of Trustees and Senior Management Team have developed *Vision 2025* which not only sets out an ambitious direction of travel for the coming years but reflects our need to be agile to all new and developing challenges carers will face as we continue through and beyond the pandemic; and the political, social, and human impacts that will be felt as a result.

Priority

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

What we said we'd do in 2020/21:

- 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.

One of the changes that affected the global population in the last year was how heightened our reliance on digital technologies has become – whether staying in touch while people are in lockdown or have been shielding; accessing information and support when face-to-face services have not been available; ordering food or other items to be delivered to our homes, in order to stay safe; or the move to more people needing to work or school from home. For carers it has been essential that systems were accessible, sources of support available, and recognition that some of our most vulnerable carers and those they care for may be digitally challenged or excluded. And as reliance on digital services has become more pronounced, it has been vital that Carers UK's systems have been both secure and robust.

Digital systems and security

At a time of heightened reliance on our digital offer, a significant undertaking has been to look at our digital security across the organisation, including ensuring everything we do whilst working remotely is as robust as when office based. The work undertaken saw us achieve Cyber Essentials first level accreditation and we are now working towards the Cyber Essentials Plus level.



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

Our conferences and events go virtual

Throughout the year, Carers UK runs various face-to-face events and activities including our Members' Conference, State of Caring Conference, roadshows, Nation Summits and the Scottish Carers' Parliament. Although many were scheduled for later in the year, we made the early decision that hosting these events in person was unlikely to be appropriate and that even if they coincided with any easing of lockdown restrictions, we had a duty of care to carers, our staff and volunteers. It was of paramount importance to keep them safe at all times and not introduce any additional risks as a result of indoor events or unnecessary travel. We also recognised the opportunity to reach those carers who had not been able to attend for practical reasons through moving our conferences online, with an ability to dip in and out of sessions, or for us to share content, post event, via video clips. Although there was a learning curve involved in setting up and managing fully digital events, the feedback, particularly from those who had previously been unable to attend, was overwhelmingly positive and ensures that digital attendance is something we will look to include in the future.

My BackUp

Planning for emergencies has been key for carers, helping reduce stress for many and can be of immense support when help is needed during a critical time. The My BackUp interactive tool takes carers through the process of creating their personalised plan and by sharing with trusted family members, friends or healthcare professionals can help ease worries if they become unable to care for someone in the future.

Web redevelopment and the launch of the new Carers Week website

The outbreak of the pandemic made clear that our digital channels were going to be key in addressing the surge in demand for up-to-date information and support by carers and other core audiences. We needed to focus in the short-term in ensuring our existing offer could be easily and frequently updated. For the Carers UK website, the immediate need was to create new coronavirus specific pages where we could update information, sometimes several times a day, reflect differences across the nations in response to the crisis and ensure that all content could be easily found and recognised as both trustworthy and of the highest quality. Carers Week faced an additional challenge, with organisations rethinking their plans for what would normally be physical activities, what could we offer to ensure individuals were engaged? Building on our existing site we developed the opportunity for people to add their voice to help Make Caring Visible which saw thousands of individuals and organisations taking part. As a result of the success of this we looked to streamline how individuals can get involved through the development of the new website, enhancing it for mobile and tablet, and launching the first of our four redeveloped websites in March 2021.

Looking forward: our Vision 2025

The coronavirus pandemic has meant that creating a detailed five-year strategy would be almost impossible given the fast-moving situation, changing political landscape and the shifting status of carers' situations. Nevertheless, Carers UK wanted to set out our broad ambitions and goals for the next five years alongside our shorter-term rolling programme that means we can respond in a more agile manner, as funding challenges and beneficiary needs dictate.

We have developed an overarching three pillared approach to tackle the issues carers face of Equality, Support and Recognition – these are underpinned by income generation and our impact collection and reporting overseen by our new values.

Equality

Under our equality pillar we will focus on policy and legal change. Whilst this is a considerable ambition, by setting our sights high we believe it will enable us to achieve much en-route to our final goal, including addressing the longstanding issue of gender imbalance.

In 2021/22 we will:

- launch our ambition for legal equality - to make caring the tenth protected characteristic
- campaign for access to Care Leave - once the result of statutory Care Leave consultation is known, work for speedy implementation and movement towards legislation, including for Paid Care Leave
- influence NHS legislation ensuring a duty to identify, support and consult carers throughout the UK
- campaign for improvement to carer and related benefits UK wide, increasing awareness and uptake - including a supplement to, and increase in Carer's Allowance in England, Wales and Northern Ireland
- campaign for improved digital inclusion for unpaid carers across health, social care, work and throughout life.

Support

We provide support in a variety of ways: our campaign and policy work ensure carers have the support they need provided by the government, the direct support we provide to carers and our research underpins both to ensure we are providing and campaigning for what carers need/want at that moment in time. In addition, there is our indirect support through our partnerships.

In 2021/22 we will:

- drive the debate and influence reform of social care, ensuring it includes carers across the UK
- influence NHS (England) to deliver the carers element of the Long-Term Plan and People Plan
- campaign for carers ID: to better enable carers to gain the support they need
- campaign for improved provision of respite care and develop Carers UK's end of caring support
- work to ensure service providers and employers support both carers and the people they care for better, through promotion and the effective roll out of EfC and DRC
- scope and develop a plan for the digital transformation of the Helpline support services, whilst maintaining current levels, plus launch Listening Support service in England and Wales
- expand significantly peer and facilitated support developed during the pandemic.
- enhance our volunteering offer including employee volunteering
- promote Self-Advocacy Support for carers across the UK
- develop audio resources for carers who are digitally excluded.

Recognition

Recognition is the final pillar of our strategy and links all the themes together. During the (on average) two years it takes for carers to identify as such, their own health, wellbeing, and financial stability suffers and often, by putting their own needs last, their ability to care is also impacted.

We know that early intervention for carers is best and has the added benefit of positively impacting not only the carer but the person they care for too.

In 2021/22 we will:

- research and report on key topic areas for carers including the ongoing effect of the COVID-19 crisis; the importance of and access to breaks; carers health and wellbeing; nutrition and physical activity; work and digital; and what specific support is needed by BAME carers, LGBTQ+ carers, older carers and faith-based groups
- create campaigns targeting increased recognition from the likes of GPs and pharmacists
- deliver pre-census campaign in Scotland
- launch our Carer Aware campaign in Wales, improving recognition and respect for unpaid carers in health and social care settings
- research and estimate the number of carers globally
- deliver Carers Week including increased participation - and Carers Rights Day including increased engagement and media coverage.

Cross-cutting activities

To deliver against the three core pillars of our strategy will need to ensure we also deliver the following actions and activities.

In 2021/22 we will:

- invest in our people
- increase our capacity to deliver
- develop a framework to collect and measure our impact across the organisation
- deliver three new websites
- scope work on a cross organisational CRM
- continue to take a proactive approach to risk management
- exceed income generation targets with a focus on multi-year funding
 - raising sufficient income to meet expenditure
 - operating in line with our reserves policy
 - ensuring continued robust financial planning and management.

With ambitious plans for the coming years, a team was formed from across the organisation to work with staff and other key stakeholders to develop our new set of values, helping clarify both what we believe and how we will all behave, and will be central to our success in delivering our Vision 2025.

Embedding our new values across the organisation will ensure that at all times, and in all we do, we are;

- **ATTENTIVE**
 - we welcome everyone and are always supportive and ready to help
 - we listen carefully and respond with expertise and understanding.
- **AMBITIOUS**
 - we're courageous and innovative, aiming high and seeking out new ideas and opportunities that take us forward
 - we are always learning and improving, pushing boundaries to increase our impact.
- **ACHIEVERS**
 - we are passionate about what we do and tenacious in our pursuit of change
 - we adapt to new challenges and are always striving for excellence
 - we love to collaborate and enjoy working with others to reach our goals.

Although the challenges have been significant during the year, it is the effect of the coronavirus pandemic on the lives of unpaid carers throughout the United Kingdom that has further galvanised our determination to do all we can to make life better for carers.

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:

- Barclays LifeSkills
- Basil Samuel Charitable Trust
- Centrica
- CSIC Charity Fund
- Ecorys
- FatFace
- Foxy Bingo
- John James Bristol Foundation
- Marie-Louise von Motesiczky Charitable Trust
- National Lottery Community Fund, Wales
- Northern Ireland Executive
- Nutricia
- Oxygen House Foundation
- Pears Foundation
- Seqirus
- Spirit of 2012
- Sport England
- The BUPA Foundation
- The Department of Health and Social Care for the Carers UK Helpline
- The Department of Health and Social Care through the Health and Wellbeing Alliance
- The Dulverton Trust
- The Francis Winham Foundation
- The Garfield Weston Foundation
- The Gerald Micklem Charitable Trust
- The Haramead Trust
- The Helen Roll Charity
- The J and M Britton Charitable Trust
- The John Coates Charitable Trust
- The John Ellerman Foundation
- The Joseph and Lilian Sully Foundation
- London Freemasons Charity
- The National Lottery Community Fund and Nesta through the Accelerating Ideas programme
- The National Lottery Community Fund with funding from the Department for Culture, Media and Sport
- The QBE EO Foundation
- The Queensberry House Trust
- The Ratcliff Foundation
- The Rayne Foundation
- The Robertson Trust
- The Sandhu Charitable Foundation
- The Scottish Government
- The Sun 50th Birthday Readers Fund
- The Triangle Trust 1949 Fund
- The ZVM Rangoonwala Foundation
- Virgin Media
- Welsh Government

Report of the Trustees

For the year ended 31 March 2021

The Trustees present their report and audited financial statements for the year ended 31 March 2021. 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 2020/2021 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 appointment 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 2020-21. We have not worked with professional fundraisers or commercial participators in the year. 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 2020/21 achieving an operating surplus of £450.5k. This will serve as a buffer to confront the challenges that lie ahead in 2021/22. 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 2020/21 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 only furloughed one of our colleagues. The majority of our staff have been redeployed 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
 (passed away 14 February 2021)
 The Baroness Pitkeathley OBE
 Dame Philippa Russell DBE
 Caroline Walters OBE

Patrons

Johnnie Walker MBE
 Tiggy Walker

Trustees

Nick Baird CMG CVO (Chair)
 (appointed October 2020) **FR/GCM/N/R**
 Professor David Grayson CBE (Chair)
 (retired October 2020)
 Virginia Pulbrook (Vice Chair) **FR/R**
 Eleanor Bradley (Treasurer) **FR/R**

Tim Anfilogoff
 Dr Helen Brown **FR**
 Paula Bryan **GCM**
 Margaret Dangoor **GCM**
 Beverley Harden
 Colin Harper (Chair Northern Ireland Committee)
 Flora Martin MBE (Chair of Scotland Committee)
 Sivakhanthan Shanmuganathan
 Dr Rosie Tope **N**
 Martha Wiseman **FR/GCM**

Special advisor to the Board

Jeff Hayes **FR**

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

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

2020–2021

We are pleased to report that 2021 was a successful year in terms of income raised and progress made in the final year of our 2017-2021 plan. For the year ending March 2021 Carers UK achieved a total income of £4.487m against total expenditure of £4.036m giving an operating surplus of £450k (£564k after unrealised gains on investments).

INCOME

Total income for the year increased by £481k. We were successful in obtaining funding from Covid-19 specific funds from charitable trusts and foundations, the National Lottery Community Fund and the Department of Health and Social Care.

Unrestricted income increased from £2.5m in 2020 to £2.8m in 2021. Part of the increase is due to the higher level of trust income compared to 2020.

Donations and legacies were £2.06m in the year an increase of £202k from 2020. Within this trust income increased by £302k to £532k; donations and gifts increased by £76k to £157k; and fundraising events increased by £51k to £350k. The overall cost of fundraising decreased by 8% (£26k) to £352k.

Incoming resources from charitable activities, received primarily from grants, statutory funding, consultancy and subscriptions, increased by £299k (14%) to £2.4m. This was mainly due to an increase in grants, contracts and subscriptions to our Digital Resource for Carers and Employers for Carers membership.

EXPENDITURE

Overall, our total resources expended for the year were £4m, £431k higher compared to last year (2020: £3.6m).

During the year we spent a total of £3.7m on charitable activities. We increased unrestricted expenditure on charitable activities by £205k (12%) to £1.9m. Restricted expenditure increased by £200k (13%) to £1.7m, mainly due to an increase in delivering grants and contracts. The overall spending on charitable activities is £405k higher compared to last year due to these reasons.

Fundraising costs were £25k higher than last year at £352k (2020: £327k). Our overall fundraising return was £5.80 for each £1 spent (2020: £5.70 for each £1 spent).

We have been able to commit 91%* (2020: 91%) of expenditure to our core work of making life better for carers. *Charitable expenditure is 91% (2020:91%) 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 2020/2021 our total reserves were £4,038,230.

Our general funds increased by 49% to £1.674m. 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 of COVID-19 the Board have agreed that we should increase the general reserves fund to six months forward expenditure. At 31 March 2021 the general reserve fund increased to £1.674m. This is equivalent to 6.8 months of 2022 budgeted unrestricted expenditure of £2.959m. This robust reserves position will give us the confidence to meet the challenges of the years ahead as we continue to operate with a high level of uncertainty around what fundraising activity will be possible over the next year or two.

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 £115k to £1.932m.

Currently the designated fund balance relates to the London office with a value of £1.306m and £626k 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 43% to £432k.

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 2021 the investment in pooled funds was valued at £478,077 representing a increase of 31% (£113,418) in the year. Details can be found in Note 9b.

Going concern review

The Board and Senior Management team carry out an annual review of the charity's financial position and performance as part of our budget setting process. We have assessed projected future income, expenditure and cash flows over the period to 31 March 2024, 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 are also actively working to secure new income sources in 2021/22 to fund planned activities into the next couple of years.

In summary:

- all income streams are risk assessed, and likelihood is tested against prior year performance and amounts secured to date for the following three financial years. Restricted income is only included in the budget when contracts are signed or are near certain to be renewed.
- expenditure is reviewed annually and a regular review of the top ten suppliers is undertaken.
- we have budgeted to achieve a breakeven position in 2021/2022 on unrestricted income and expenditure. This will allow us to continue to hold six months of unrestricted reserves and enable us to continue to meet our commitments to carers with confidence.
- we will continue to ensure that restricted expenditure is only committed when funding is approved.
- all budgeted restricted income is fully identified.
- budgets and forecasts are actively monitored monthly by the senior management team. There is detailed scrutiny by the Finance and Resources Committee and reports to the Board every quarter.
- cash flow and secured income analysis form a part of the monthly management accounts which are reviewed by both the charity's Senior Management Team and the Finance and Resources Committee ahead of it going to the Board.
- our programme of work is approved by the Board at the start of the financial year. Any new activity is subject to a detailed review and is only undertaken if fully funded.
- our business model can be easily scaled up or down subject to funding being secured or renewed.

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.

**Approved by the Trustees on 07 July 2021
and signed on their behalf by:**



Nick Baird
(Chair)



Eleanor Bradley
(Treasurer)

Independent Auditor's report

We have audited the financial statements of Carers UK (the 'charitable company') for the year ended 31 March 2021 which comprise the statement of financial activities, balance sheet, statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 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 charitable company's affairs as at 31 March 2021 and of its 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, the Charities and Trustee Investment (Scotland) Act 2005 and regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended)

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 charitable company 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

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on Carers UK's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees' annual report, including the strategic report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. 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. 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 course of 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 this gives rise to a material misstatement in the financial statements themselves. 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, including the strategic report, for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- The trustees' annual report, including the strategic 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 charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' annual report, including the strategic report.

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

- Adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- The 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.

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

Our 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.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud are set out below.

Capability of the audit in detecting irregularities

In identifying and assessing risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, our procedures included the following:

- We enquired of management, which included obtaining and reviewing supporting documentation, concerning the charity's policies and procedures relating to:
 - Identifying, evaluating, and complying with laws and regulations and whether they were aware of any instances of non-compliance;
 - Detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected, or alleged fraud;
 - The internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- We inspected the minutes of meetings of those charged with governance.
- We obtained an understanding of the legal and regulatory framework that the charity operates in, focusing on those laws and regulations that had a material effect on the financial statements or that had a fundamental effect on the operations of the

charity from our professional and sector experience.

- We communicated applicable laws and regulations throughout the audit team and remained alert to any indications of non-compliance throughout the audit.
- We reviewed any reports made to regulators.
- We reviewed the financial statement disclosures and tested these to supporting documentation to assess compliance with applicable laws and regulations.
- We performed analytical procedures to identify any unusual or unexpected relationships that may indicate risks of material misstatement due to fraud.
- In addressing the risk of fraud through management override of controls, we tested the appropriateness of journal entries and other adjustments, assessed whether the judgements made in making accounting estimates are indicative of a potential bias and tested significant transactions that are unusual or those outside the normal course of business

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

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 44(1) (c) of the Charities and Trustee Investment (Scotland) Act 2005. Our audit work has been undertaken so that we might state to the charitable 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.



Joanna Pittman
(Senior Statutory Auditor)

Date: 15 July 2021

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

Statement of financial activities

(incorporating an
Income and
Expenditure Account)
For the year ended
31 March 2021

	Notes	Unrestricted Funds	Restricted Funds	Total 2021	Unrestricted Funds	Restricted Funds	Total 2020
		£	£	£	£	£	£
Income from:							
Donations & Legacies	2	1,957,173	103,327	2,060,500	1,682,539	175,643	1,858,182
Charitable Activities	3						
Giving Carers a stronger voice		320,173	526,508	846,681	310,178	396,792	706,970
Providing Carers with Support		301,380	637,843	939,223	283,968	611,030	894,998
Education, Influence and Training		157,524	459,406	616,930	163,327	338,203	501,530
Total Charitable Activities		779,077	1,623,757	2,402,834	757,473	1,346,025	2,103,498
Investments		2,371	-	2,371	4,611	-	4,611
Publication Sales		40	386	426	2,576	975	3,551
Misc Income		20,584	-	20,584	35,487	-	35,487
		22,995	386	23,381	42,674	975	43,649
Total income		2,759,245	1,727,470	4,486,715	2,482,686	1,522,643	4,005,329
Expenditure on:							
Raising funds:	5						
Fundraising costs		352,486	-	352,486	326,603	-	326,603
Charitable Activities							
Giving Carers a stronger voice		565,128	571,331	1,136,459	519,064	445,240	964,304
Providing Carers with Support		730,112	631,350	1,361,462	588,885	615,274	1,204,159
Education, Influence and Training		653,021	532,819	1,185,840	635,486	474,865	1,110,351
Total Charitable Activities		1,948,261	1,735,500	3,683,761	1,743,435	1,535,379	3,278,814
Total Expenditure		2,300,747	1,735,500	4,036,247	2,070,038	1,535,379	3,605,417
Net incoming/(outgoing) resources before transfers	6	458,498	(8,030)	450,468	412,648	(12,736)	399,912
Unrealised (Losses) on Investments	9b	113,418	-	113,418	(34,735)	-	(34,735)
Transfers between Funds		(139,215)	139,215	-	(128,775)	128,775	-
Net Movements in Funds for the year	13a	432,701	131,185	563,886	249,138	116,039	365,177
Reconciliation of funds							
Total funds brought forward		3,173,275	301,069	3,474,344	2,924,137	185,030	3,109,167
Total funds carried forward		3,605,976	432,254	4,038,230	3,173,275	301,069	3,474,344

All of the above results are derived from continuing activities. There were no other recognised gains and losses other than those stated above. Movements in funds are disclosed in Note 15 to the financial statements.

Balance sheet

Company number:
00864097
As at 31 March
2021

	Notes	2021	2020
		£	£
Fixed assets			
Tangible fixed assets	9a	1,321,057	1,392,823
Investments	9b	478,077	364,659
Total fixed assets		1,799,134	1,757,482
Current assets			
Debtors	10	621,736	1,444,262
Cash at bank and in hand: Head Office		3,921,923	1,930,351
Total current assets		4,543,659	3,374,613
Current liabilities			
Creditors: amounts falling due within one year	11a	(1,727,333)	(1,031,973)
Net current assets		2,816,326	2,342,640
Creditors: amounts falling due after one year	11b	(577,230)	(625,778)
Net Assets less current liabilities less Creditors falling due after one year		2,239,096	1,716,862
Total Net Assets		4,038,230	3,474,344
Funds			
Restricted funds	13	432,254	301,069
Designated funds		1,932,126	2,046,761
General		1,673,850	1,126,514
Total funds		4,038,230	3,474,344

Approved by the Board of Trustees on 07 July 2021
and signed on its behalf by:



Nick Baird
(Chair)



Eleanor Bradley
(Treasurer)

The notes on pages 47 to 59 form part of these financial statements.

Statement of cash flows

For the year
ended 31 March
2021

	2021	2020
	£	£
Reconciliation of operating surplus to net cash outflow from operating activities		
Net incoming/(outgoings) resources before revaluations	563,886	365,177
Investment income	(2,371)	(4,611)
Depreciation charges	71,766	70,450
Unrealised loss on investment	(113,418)	34,735
(Increase)/Decrease in debtors	822,526	(866,700)
Increase/(Decrease) in creditors	694,044	494,942
Net cash (outflow) from operating activities	2,036,433	93,993
Cash Flows from investing activities		
Investment income	2,371	4,611
Cash Flows from Capital Expenditure		
Purchase of fixed assets	-	(20,563)
	-	(20,563)
Cash Flows from financing activities		
Repayments of borrowings	(47,232)	(45,953)
	(47,232)	(45,953)
Change in cash and cash equivalents in the year	1,991,572	32,088
Cash and cash equivalents brought forward	1,930,351	1,898,263
Cash and liquid resources as at 31 March	3,921,923	1,930,351

Notes to the financial statements

For the year ended 31 March 2021

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) - (Charities SORP FRS 102), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) 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.

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 financial statements are therefore not consolidated.

Reporting period

The financial statements cover the year to 31 March 2021.

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.

Due to the current Covid 19 pandemic the trustees have exercised even more caution with regard to the charity and consideration is given to the effects of outside elements on the charitable company's core activities. The close relationships which the company has with its funders has enabled the trustees to place reliance on the future funding requirements continuing to be met and therefore consider that the charitable company can continue as a going concern.

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.

Corporate subscriptions are received for the Employers for Carers scheme. The subscriptions provide employers access to resources throughout the subscription period, which is usually one year. Our accounting policy is to recognise the subscription income as the benefits are provided. The estimate for accounting purposes is to recognise the subscription income at the point of initial subscription or renewal, as this is when most of the services are provided.

The charity receives a number of legacies and maintains a pipeline of notifications. The charity uses a portfolio approach to estimate the monetary value of the income that may be received from legacies to which entitlement is established and probate is granted. Legacy income will going forward only be recognised when it is received.

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	2021	Unrestricted	Restricted	2020
	£	£	£	£	£	£
Donations and Gifts inc.						
Membership	155,408	1,253	156,661	79,233	1,027	80,260
Funding for DH Strategic Partners Programme (a)	-	82,540	82,540	-	59,998	59,998
Legacies	253,064	3,000	256,064	484,136	-	484,136
Corporates	556,392	5,542	561,934	479,866	101,920	581,786
Trusts	531,783	-	531,783	229,922	-	229,922
Fundraising Events	339,069	10,992	350,061	286,539	12,509	299,048
Tax reclaims	25,297	-	25,297	13,716	189	13,905
Payroll Giving	96,160	-	96,160	109,127	-	109,127
	1,957,173	103,327	2,060,500	1,682,539	175,643	1,858,182

(a) Relates to a grant receivable from Department of Health (DH) as part of the Strategic Partners Programme shared 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.	2021	2020
	£	£	£	£	£	£
Giving Carers a stronger voice	91,874	455,654	1,779	297,375	846,682	706,970
Provide Carers with Support	51,450	580,562	5,361	301,050	939,223	894,998
Education, Influence and Training	40,425	421,865	4,783	149,856	616,929	501,530
	183,749	1,458,081	11,923	749,081	2,402,834	2,103,498

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

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		2021 Restricted	2020 Restricted
	£	£	
Communications, Campaign, Media & Public Affairs			
	The Dulverton Trust	35,000	35,000
	Sport England	41,756	57,401
Technology & Innovation			
	Marie-Louise von Motesiczky Charitable Trust	100,000	100,000
	Clothworkers Company	-	25,000
	Other grants< £20,000	-	15,000
	BUPA UK Foundation	-	55,200
Carers UK Volunteer Programme	Nesta	35,000	50,000
Information, Support & Advice			
	Barclays Bank	168,262	135,362
	Garfield Weston Foundation	30,000	10,000
	National Lottery	95,123	-
Nation offices:			
Scotland: Work in Scotland	Scottish Government	266,337	281,400
	The Robertson Trust Core Grant	18,000	-
	Trusts< £15,000	39,166	13,050
Wales: Work in Wales	Welsh Government Sustainable Social Services Grant	344,623	210,257
	Welsh Government	-	35,000
	Other grants< £10,000	3,950	9,500
	Carers Trust Wales	168,090	-
	Big Lottery	47,706	93,161
N.Ireland: Work in N.Ireland	DHSSPS (N.I): Core Grant	39,508	31,607
	Northern Health and Social Care Trust	-	39,552
	The Triangle Trust: Core Grant	-	20,000
	Other grants< £10,000	25,560	13,300
Total grants received for charitable activities		1,458,081	1,229,790

5a 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	2021	2020
	£	£	£	£	£	£	£	£
Staff Costs (Note 7)	261,711	719,690	820,340	705,020	-	225,777	2,732,538	2,455,962
Fundraising costs	90,755	-	-	-	-	-	90,755	103,087
Finance	-	-	-	-	-	191,796	191,796	69,787
Information Technology	-	-	-	-	-	95,753	95,753	28,086
General Administration	-	-	-	-	-	134,815	134,815	148,738
AGM and Trustees travel	-	-	-	-	22,826	-	22,826	23,501
Audit Fees	-	-	-	-	11,500	-	11,500	11,500
Depreciation	-	21,530	21,530	28,706	-	-	71,766	70,450
Direct costs	-	189,034	317,318	178,126	-	-	684,478	694,306
Total	352,486	930,254	1,159,188	911,852	34,426	648,141	4,036,247	3,605,417
Support Costs – allocated by staff time apportionment	-	195,127	189,877	263,137	-	(648,141)	-	--
Governance Costs	-	11,077	12,397	10,852	(34,326)	-	-	--
Total resources expended	352,486	1,136,458	1,361,462	1,185,841	-	-	4,036,247	3,605,417

5b Total resources expended: prior year

	Costs of raising funds	Giving Carers a strong 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	2,455,962	2,009,790
Fundraising costs	103,087	-	-	-	-	-	103,087	182,698
Finance	-	-	-	-	-	69,787	69,787	118,616
Information Technology	-	-	-	-	-	28,086	28,086	35,144
General Administration	-	-	-	-	-	148,738	148,738	156,324
AGM and Trustees travel	-	-	-	-	23,501	-	23,501	12,115
Audit Fees	-	-	-	-	11,500	-	11,500	12,000
Depreciation	-	21,135	21,135	28,180	-	-	70,450	68,887
Direct costs	-	156,395	299,657	238,254	-	-	694,306	618,901
Total	326,603	813,920	1,057,443	910,333	35,001	462,117	3,605,417	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)	-	-	-
Total resources expended	326,603	964,305	1,204,161	1,110,349	-	-	3,605,417	3,214,476

5c Grants awarded

	2021	2020
	£	£
Department of Health (DH): Strategic Partners Programme	65,315	29,999
Total	65,315	29,999

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

	2021	2020
	£	£
This is stated after charging/(crediting):		
Depreciation	71,766	70,450
Trustees' remuneration	-	-
Trustees' reimbursed expenses: Travel, subsistence and care expenses	-	1,387
Auditors' remuneration	11,500	11,500
Number of Trustees whose expenses were reimbursed	-	6

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

	2021	2020
	£	£
Salaries and Allowances	2,341,279	2,110,666
Social Security Costs	235,592	208,157
Pension Costs	140,785	124,030
Redundancy costs	14,882	13,109
	2,732,538	2,455,962
Total emoluments paid to staff were:	2,496,946	2,247,805

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

	2021	2020
	No.	No.
Charitable	51	47
Support	8	9
Fundraising	7	6
Total emoluments paid to staff were:	66	62
Number of employees' earning over £60,000		
£80,001 - £90,000	1	1
£70,001 - £80,000	2	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 £195,329 (2020: £145,390).

The charity trustees were not paid or received any other benefits from employment with the charity in the year (2020: £nil). No charity trustee received payment for professional or other services supplied to the charity (2020: £nil).

8 Taxation

The charity is exempt from corporation tax as all its income is charitable and is applied for charitable purposes.

9a Tangible fixed assets

	Long Leasehold Building	Leasehold Improvements	Office/Gen Equipment	Total
	£	£	£	£
Cost				
At 1 April 2020	1,361,012	803,651	36,295	2,200,958
Additions	-	-	-	-
At 31 March 2021	1,361,012	803,651	36,295	2,200,958
Accumulated Depreciation				
At 1 April 2020	319,891	471,021	17,223	808,135
Charge for year	27,220	40,183	4,363	71,766
At 31 March 2021	347,111	511,204	21,586	879,901
Net book value				
At 31 March 2021	1,013,901	292,447	14,709	1,321,057
At 31 March 2020	1,041,121	332,630	19,072	1,392,823

9b Investments

	2021	2020
	£	£
Market value at the start of the year	364,659	399,394
Additions at historic cost	-	-
Disposal proceeds	-	-
Unrealised (loss) / gains	113,418	(34,735)
Market value at the end of the year	478,077	364,659
Historical cost at the year end	400,000	400,000

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

10 Debtors

	2021	2020
	£	£
Trade debtors	460,780	1,309,263
Other debtors	-	4,029
Prepayments	6,000	34,058
Accrued income	154,956	96,912
	621,736	1,444,262

11a Creditors: amounts due within one year

	2021	2020
	£	£
Trade creditors incl other creditors	16,729	35,690
Bank loans	48,548	47,232
Other Taxes & Social Security	156,197	313,812
Accruals and deferred income	1,505,859	635,239
	1,727,333	1,031,972

Deferred income

	2021	2020
	£	£
Balance at the beginning of the year	572,887	194,195
Amount released to income in the year	(572,887)	(194,195)
Amount deferred in the year	1,417,788	572,887
Balance at the end of the year	1,417,788	572,887

Deferred income comprises of income received for Covid 19 support relating to future periods and sponsorship for Carers Week, which occurs after the year end.

11b Creditors: amounts falling due after one year

	2021	2020
	£	£
Loan payable due after one year and less than five years	263,788	256,640
Loan payable due after five years	313,442	369,138
	577,230	625,778

Bank loan totalling £625,778 (2020: £673,010) 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. The loan commenced in March 2017 and the term of loan is 15 years at a minimum rate of 2.75% per annum.

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

12a Analysis of net assets between funds: current year

	Restricted funds	Designated funds	General funds	Total funds
	£	£	£	£
Tangible fixed assets	-	1,306,348	14,709	1,321,057
Investments	-	-	478,077	478,077
Net current assets	432,254	1,203,008	1,181,064	2,816,326
Long term liabilities	-	(577,230)	-	(577,230)
Net assets at the end of the year	432,254	1,932,126	1,673,850	4,038,230

12b Analysis of net assets between funds: prior 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	2,342,640
Long term liabilities	-	(625,778)	-	(625,778)
Net assets at the end of the year	301,609	2,046,761	1,126,514	3,474,344

13a Movements in funds: current year

	As at 1 April 2020	Incoming resources	Resources expended	Transfers between Funds	As at 1 March 2021
	£	£	£	£	£
Restricted funds					
Information & Technology	-	100,000	100,000	-	-
Information & Advice	-	45,000	45,000	-	-
Carers Strategy	-	82,540	-	-	82,540
Communications, Campaigns, Media & Public Affairs	-	135,322	135,322	-	-
Sport England	34,600	41,756	79,574	3,218	-
Primary Care Navigator	10,345	-	-	-	10,345
Centrica	26,309	-	26,309	-	-
Accelerating Ideas Volunteering	-	20,000	100,470	80,470	-
Barclays	130,303	168,262	169,752	-	128,813
National Lottery Community	-	95,123	95,123	-	-
Virgin Media	-	6,999	56	-	6,943
Nation Offices:					
Northern Ireland	-	78,909	134,436	55,527	-
Scotland	-	358,695	355,522	-	3,173
Wales	75,739	594,864	493,936	-	176,667
Legacy Funds					
West Sussex Carers Fund	23,773	-	-	-	23,773
Total Restricted funds	301,069	1,727,470	1,735,500	139,215	432,254
Unrestricted funds					
Designated Funds					
Loan repayment fund	673,010	-	-	(47,232)	625,778
Office fund	1,373,751	-	67,403	-	1,306,348
Total Designated Funds	2,046,761	-	67,403	(47,232)	1,932,126
General funds	1,129,965	3,102,212	2,329,112	(139,215)	1,673,850
Trf to Office Funds	-	-	-	-	-
General Funds	1,129,965	3,012,212	2,329,112	(139,215)	1,673,850
Total Unrestricted Funds	3,176,726	3,012,212	2,396,515	(186,447)	3,605,976
Total Funds	3,477,795	4,739,682	4,132,015	(47,232)	4,038,230

13b Movements in funds: prior year

	As at 1 April 2019	Incoming resources	Resources expended	Transfers between Funds	As at 1 March 2020
	£	£	£	£	£
Restricted funds					
Information & Technology	-	80,200	80,200	-	-
Information & Advice	-	110,180	110,180	-	-
Carers Strategy	-	59,998	59,998	-	-
Communications, Campaigns, Media	-	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
Nation Offices					
Northern Ireland	-	124,526	186,806	62,280	-
Scotland	-	352,545	364,095	11,550	-
Wales	95,597	352,801	372,659	-	75,739
Legacy Funds					
West Sussex Carers Fund	23,773	-	-	-	23,773
Total Restricted funds	185,030	1,522,643	1,535,379	128,775	301,069
Unrestricted funds					
Designated Funds					
Loan repayment fund	718,963	-	-	(45,953)	673,010
Office fund	1,441,154	-	67,403	-	1,373,751
Total Designated Funds	2,160,117	-	67,403	(45,953)	2,046,761
General funds	764,020	2,482,686	2,037,370	-	1,209,336
Trf to Office Funds	-	-	-	(82,822)	-
General Funds	764,020	2,482,686	2,037,370	(82,822)	1,209,336
Total Unrestricted Funds	2,924,137	2,482,686	2,104,773	(128,775)	3,173,275
Total Funds	3,109,167	4,005,329	3,640,152	-	3,474,344

(a) Designated Funds

Office Fund	This represents the net book value of the leasehold and improvements to the building at 20 Great Dover Street, London, SE1 4LX
Loan repayment fund	This represents the amount to repay loan commitments

(b) Restricted Funds

Information and technology	Funding to assist in the development of software and databases to support carers and develop stronger links.
Information and Advice	Funding to support the adviceline team donated by Garfield Weston and Barclays Bank.
Carers Strategy	Support from the Department of Health Carers Strategy Fund for Carers UK and Carers Trust.
Communications, Campaigns, Media & Public Affairs	Funding to support the advice and advocacy work undertaken by Carers UK Limited to promote carers rights.
Barclays	Funding to assist in the development of programmes designed to assist commercial organisations in helping carers within their workforces.
Primary Care Navigator project	Contract to improve identification and support of carers within the primary care system within the boroughs of Westminster, Kensington & Chelsea and Hammersmith & Fulham.
Centrica	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.
Sport England	Funding to support a project to enable carers to access the benefits of physical activities.
Carers UK Accelerating Ideas Volunteering Programme	To establish a new, integrated country-wide social action programme to enable carers and former carers to volunteer time to support carers. Funding for England and Wales only.
National Lottery Covid Fund	Funding to help Carers UK continue to deliver its programmes of help and support to Carers during the pandemic.
Virgin Media	Funding to help develop and expand Carers UK support and advice systems to all parts of the UK.
Nation Offices:	This relates to funds held in respect of offices based in Northern Ireland, Wales and Scotland.
Wales	Funding from the Welsh Government and others in support of our work in Wales.
Scotland	Funding from the Scottish Government and others in support of our work in Scotland.
Northern Ireland	Funding from the Northern Irish Government, Health and Social Care Trusts and others in support of our work in Northern Ireland.
Branches: West Sussex Carers Fund	A legacy left for the benefit of carers in West Sussex.

14 Related party transactions

There are no related party transactions to disclose for 2021 (2020: none).

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.

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