



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 01	Month 01	Year 2025		Day 31	Month 12	Year 2025

Section A Reference and administration details

Charity name Home Instead Charities UK

Other names charity is known by

Registered charity number (if any) 1156700

Charity's principal address

Unit 2 Walnut Business Centre
Lower Stretton
Warrington
Postcode WA4 4PG

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Martin Jones	Chair		
2	Victoria Massey			
3				
4				
5				
6				
7				
8				
9				
10				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
Diana Stephenson	
Clare Jefferies	

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Penelope Hamer

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	CONSTITUTION
How the charity is constituted (eg. trust, association, company)	CHARITABLE INCORPORATED ORGANISATION
Trustee selection methods (eg. appointed by, elected by)	BY APPOINTMENT

Additional governance issues (Optional information)

You may choose to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The objectives of the charity are to further such charitable purposes for the benefit of the elderly (as are recognised under the laws of England, Wales and Scotland) as the trustees see fit from time to time and in particular but not exclusively through making of grants.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Following the rebrand of the core Home Instead business the decision to rebrand the charity to maintain its link to the Home Instead franchise network was taken and a full rebrand was completed in November 2025. This was across all operations resulting in new marketing and branding materials for each of the companionship cafes operating, Home Instead Charities organised events i.e. Carols at the Cathedral and the website.

A survey of the current café estate identified a number of cafes struggling with operations, a number of gaps in service provision and potential to grow the estate following the streamlining and changes to the grant making application processes. 10 cafes are currently dormant with 24 meeting regularly every month.

In 2025 the charity awarded 53 grants totalling £26,988 benefiting 3,292 ageing adults across the UK.

Awards included:

Senior Tigers Club, Hull - £270

This grant was to pay for the volunteer driver of the transport provided for older people to access a monthly meeting at the MKM stadium in Hull. The funding has paid for the driver's tea and biscuits, dinner and also towards to hire of the bus at 10 meetings across the year.

12 seniors were supported.

Neighbours In Poplar, Canary Wharf, London - £500

This award funded a special Windrush project to celebrate and honour the contributions of the Windrush generation at an event on July 4th 2025, creating an immersive and meaningful experience for attendees. Leading up to the event, interviews with twelve individuals who were part of the Windrush generation, captured their personal stories and experiences. These stories were published in 150 booklets, which will be distributed as a gift to those attending the event.

The celebration embraced the Caribbean culture with traditional food, a DJ, and a carnival-themed atmosphere. Members of the Windrush generation wore traditional dress, adding to the vibrant and authentic feel of the event. A large screen displayed a slideshow of historic Windrush photos, helping to educate and inspire guests.

100 seniors attended the event.

Slow Shopping, Newcastle Upon Tyne - £250

Slow Shopping has been working with traders and community partners to create a calmer, more inclusive atmosphere at Grainger Market—especially supportive for older people, those living with dementia, or anyone who finds busy public spaces overwhelming. The grant enables 40 ageing adults to visit Grainger Market in Newcastle which, for many, was their first independent outing to the city centre in some time.

The grant funded light refreshments at Granier Market for 40 adults and helped to build confidence, connection, and community—encouraging older individuals to re-engage with the city and each other.

Spark, Livingston £500

Spark is a community hub, supporting people who live in poverty, and, as a result, experience social isolation, loneliness, poor physical and mental health, and barriers to work/education. The group specifically focuses on tackling the social isolation that many people experience, by removing barriers to participation, through low-cost or free activities. They provide a full and varied activities calendar to help local residents to meet new friends, try new activities, and find something they love to do. Activities are open to all ages, around 70% of the people supported are over 60.

33 ageing adults were supported.

Statutory Declaration

Re: Confirmation of Compliance with Charity Commission Guidance on Public Benefit

We, the undersigned, being trustees of Home Instead Charities (hereinafter referred to as "the Charity"), hereby declare and confirm the following:

1. Awareness of Public Benefit Requirement: We acknowledge our responsibility to ensure that the activities of the Charity provide a public benefit, as per the requirements set out in the Charities Act 2011.
2. Review of Charity Commission Guidance: We confirm that we have had regard to the guidance issued by the Charity Commission on public benefit. This includes the following key documents:
 - "Charities and Public Benefit" (PB1)
 - "The Advancement of Education for the Public Benefit" (PB2)
 - "The Prevention or Relief of Poverty for the Public Benefit" (PB3)
 - Any other relevant guidance provided by the Charity Commission.
3. Application of Guidance in Decision-Making: We have duly considered this guidance in all our decision-making processes to ensure that the activities, operations, and purposes of the Charity align with the principles of providing public benefit. Specifically:
 - Our programs and initiatives are designed to serve a broad section of the public, without undue restriction.

- We prioritize transparency and accountability in our operations to demonstrate how our activities contribute to public benefit.
 - We regularly review and assess the impact of our work to ensure it continues to meet the public benefit criteria set by the Charity Commission.
4. Documentation and Reporting: We maintain accurate records and documentation of our adherence to the public benefit requirement. This includes:
- Minutes of trustee meetings where public benefit considerations are discussed.
 - Annual reports detailing how our activities provide public benefit.
 - Impact assessments and evaluations demonstrating the outcomes of our work.
5. Ongoing Commitment: We commit to ongoing education and awareness regarding public benefit requirements among trustees and staff of the Charity. We will continue to review and implement any updates to the Charity Commission's guidance to ensure continuous compliance.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Due to the charity receiving a 400% increase in applications to its grant making programme it was decided at the October Trustees Meeting and AMG to suspend accepting unsolicited applications for funding. The increase had placed an untenable increase in admin burden upon the small team that could not be sustained.

It was agreed at the Trustees meeting to focus grant making support to community groups and charities that are already working within the Home Instead Network of local offices and to support applications that were championed by individual offices. This had the benefit of removing the need to research the charities, or groups, aims and objectives and to be able to get 'on the ground' feedback from people within Home Instead that knew the organisation and could vouch for them across a number of key areas such as Impact, trustworthiness and ability to deliver on projects.

This meant a significant decrease in the administration burden and allows the team to focus more effectively on supporting groups where additional support can be galvanised from the local office and community it serves.

The benefit of this is to provide greater support and community contacts to those applications we do receive to ensure they have a long lasting and valuable local connection that will outlive the term of the grant award.

This will help to build sustainability and bring stability to local groups on a more long term basis by building a valuable relationship led partnership in their community.

This change in process and focus will also enable Home Instead Charities to build more meaningful, long term relationships with local community groups delivering consistency and long term support to better serve ageing adults across the UK.

Section D Achievements and performance

Summary of the main achievements of the charity during the year

Successes and challenges

Fundraising and Operations Manager, Alicen Thorn, decided not to return to the charity after her maternity leave finished. This has left a capacity gap in the Charities team. A review of Fundraising, Grant making and café operations was conducted to allow the charity to focus on key areas. A number of changes were made across these areas to improve efficiency around key priorities that were identified including:

Maximising fundraising in the Home Instead Network
Streamlining Grant Applications – reducing the admin burden of an increasing pipeline of applications.

Our two main events, Carols at the Cathedral and the Home Instead Annual Golf Day continued to perform well generating £19,131.

The charity operated 23 companionship cafes regularly throughout the year benefiting more than 500 ageing adults on a regular basis.

The charity awarded 53 grants to local community groups totalling £26,998 supporting 3,292 individuals.

Section E Financial review

Brief statement of the charity's policy on reserves

The Trustees agreed that no more than 3 months operating costs be held in reserves. As the salary costs of the only full time employee is borne by Home Instead, this equates to approx. £25,000 to be held in reserve.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Income – key highlights

1. Companionship Cafes £3,356
2. Home Instead Local offices raised £6,943
3. Events (Golf and Carols) raised £19,131
4. Lottery £3,817
5. Corporate donations generated £3,218

Expenditure – Key Highlights

6. Companionship Cafes expenditure of £5,331
7. Subscriptions - £3,255
8. Events Expenditure £4,162
9. Grants £26,988

(Subscriptions includes Run 4 Charity challenge portal, ACF, Fundraising Regulator, National Care Forum)

Section F Other optional information

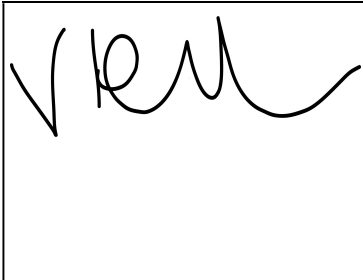
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Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Victoria Kay Massey	
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Position (eg Secretary, Chair, etc)

Trustee	
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Date

02/03/2026	
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