



Annual Review 2017-2018

Helping people in Essex to live well in later life



Chairmans Report

As Age UK Essex enters its 48th year the Charity's objective to promote the well being of older people in Essex is even more crucial than before. Over the last year the Charity has adopted a number of changes in policy to increase operational efficiencies and effectiveness. As expectations of charities from stakeholders increase, the following report highlights the Charity's achievements and impact in relation to our mission, how the Charity's resources have been managed and how the culture of the organisation supports the approach and the purposes of what it sets out to do. As a charity it is paramount that Age UK Essex is able to demonstrate the trustworthiness of what it is and what it does. The willingness to support charities, particularly in becoming long-term supporters or volunteers, relies upon these benchmarks of trust.

The devotion of the Charity helps older people to live fulfilling lives regardless of social or cultural backgrounds. These services are provided in nearly 250 towns and villages across the county. Although the Charity is a Brand Partner of National Age UK we are an independent charity and all funding comes from local sources. Some of the sources come from public agencies such as Essex County Council and Thurrock Council, but over the last year many of these funds have been adversely affected by the current economic climate. This means that fundraising is an essential part of what we do. The Charity has continued to generate income through community fundraising activities and events. We are indebted to all individuals and organisations that fund our work and enable us to reach more people every year.

Looking ahead to the forthcoming year, the Charity has identified some objectives that will be achieved by the end of the 2018/2019 financial year. These include working towards reducing the deficit and aiming to be financially self supporting as much as possible, developing a more volunteer led organisation to enhance our services and improving our engagement within the community to increase our supporters.

Despite the challenges the Charity faces, Age UK Essex continues to promote the well-being of all older people in Essex and to support people to live fulfilling and enjoyable lives. If you would like to find out more about what we do, please do not hesitate to get in touch.

Mr M Mahoney
Chairman

Chief Executives Report

After a challenging year, it gives me great pleasure to present our annual report.

As the numbers of older people across the county are growing and their needs are increasing, and people are living longer, we will continue to have many challenges. This is nothing new for the charity and we should be in no doubt that next year may be even more difficult as funding bids are likely to be more competitive. With this in mind, we will review our services and how we provide them within the finances available.

As you will see from the review, we provide many important services, which contribute to helping people remain independent and live in their own homes for longer whilst providing much needed emotional and practical support to enhance their quality of life.

I am very proud to say that collectively across our services we have reached 101,655 people in 2017-18.

As you will see from the report, we have achieved our certification of the Age UK Quality Standard which clearly demonstrates and evidences areas of good practice identified across the charity.

Our services performed outstandingly well within the current financial climate, which is all down to our excellent management team, frontline staff and our volunteers, who have all shown dedication and commitment above and beyond all expectations.

I would like to thank all staff, volunteers, funders and donors who have taken the value of our excellent work into account and made a valuable contribution, which has been gratefully received.

I now look forward to building on our successes in the future and hope you enjoy reading this report.

Diane Nicola
Chief Executive

Fundraising

The fundraising team has had a busy year with many successes.

Our Slip On Your Slippers event in October involved Radio Essex and our corporate supporters who went to town wearing their slippers to help raise funds. It was a great success with Companies such as Essex University, Leonard Gray Solicitors and the Essex Business Network all taking part and donating funds to wear their comfy slippers for a day. We are looking forward to expanding the event over the coming years.

The Chelmsford Beer and Cider Festival was a lovely opportunity to engage new volunteers and supporters and raised £4,000 in total. We had a great week chatting to members of the public about what we do and the services we provide.

Our Tinsel Tea Rooms were a great success raising funds and awareness as we entertained vulnerable people from around the County at Christmas Time. Working with Wilkin & Sons we have also enjoyed being their quiz charity of the year which raised over £700 in one evening.

We have had great success with our bag packing initiative. Working closely with Marks & Spencer in Chelmsford, we have raised over £6,000 in 2017-2018. Much of this money has been matched funded by our corporate partner for the year, Santander, raising over £10,000!

Our Big Knit Knitters made over 12,000 little hats for the Age UK Innocent Smoothie campaign and next year we're aiming for even more having been asked to knit 18,000 hats which makes us one of the most successful counties to take part in the initiative. Each little hat raises 25p for Age UK Essex.

Legacies continue to raise much needed funds, we are thankful to every person who makes generous donations through their Will. We have had many individuals, companies, schools and groups fundraise for us for which we are very grateful. The fabulous ideas that members of the public come up with, from skydiving to baking, to selling Christmas tree decorations, continue to inspire the fundraising team.



Grants



Donations



Legacies



Events

Information & Advice

During the past year we have supported some of the most vulnerable people in our communities. Our services have listened and paid attention to what our clients are really saying about what it means to cope with frailty and the challenges of the passing years.

We delivered Information and Advice that could be relied upon to over 8,500 people. We helped Older People to cope with bereavement, loss of health and vigour, cognitive decline, securing safe and secure accommodation and maintaining independence. Our workers ensured that couples were able to remain together independently, in safety and with dignity at the end of their days and that people were discharged in a safe and timely manner with choice and control when they left hospital.

Our services helped the Older People of our County to secure £1,660,000 in benefits, benefits that they had paid into, were fully entitled to, but would otherwise have remained unclaimed. Again, this maintains independence and benefits our local communities and economies.

Advocacy

We celebrated the work of our advocacy staff and volunteers who worked tirelessly within our communities. Work that took support and services into the most deprived corners of our county. We delivered choice, empowerment and voice in Jaywick, East Basildon, Harlow, Thurrock, Canvey Island and Clacton. We helped our Older People to secure their rights in Chelmsford and Colchester, in Epping and Loughton, in Brentwood, Billericay and Ongar as well as in some of our leafier, less deprived but very isolated rural pockets of deprivation and loneliness.

Our workers took our fight into the heart of places seldom seen: working within a failing care system. Within this system, we were instrumental in delivering vulnerable and otherwise powerless people from deprivation and squalour in some of the most challenging of institutional safeguarding situations. Our advocates were fearless in holding to account those responsible or callously indifferent.

Advocacy staff delivered services to over 1,400 of the people that cared for us when we needed to be cared for, those who built the society that we benefit from. Our Advocacy Staff, our Advice workers and all of our Volunteers are engaged upon the task of returning a long overdue favour on behalf of us all.

The team secured £1.6m in welfare benefits for 598 clients, average £2,861 per client.

Information & Advice

Number of clients being supported with information and advice about:

2,870

Benefits

1,680

Non-residential care

471

Health & Disabilities

337

Residential care

333

Housing

137

Hospital discharge

993

Other

Advocacy

1,428

Number of
people supported

21

Institutional
Safeguarding Cases

Home Help Service

Our Home Help Service has been providing practical support for over 20 years to enable people to remain living at home independently.

This service helps with general cleaning, laundry, changing beds and hoovering. We can also collect shopping and pick up prescriptions and much more.

The Sitting and Companionship Service has been operating for 5 years and its aim is to support Carers by providing respite to enable a Carer to have some time for themselves, knowing their loved one will be in safe hands.

Achievements

- We have developed and expanded 2 new services, Outdoor Activity Support which is available countywide, and Food Preparation, which is available in various locations across Essex.
- Working in partnership with Colchester Borough Homes as their preferred service provider within their Sheltered Schemes.
- Promoted our services by contacting other organisations and attending events across the county.

Future Plans

- To encourage donations and secure grants to allow us to expand Food Preparation across all areas of the county.
- To grow our services in order to reach more people.
- Strengthen partnerships with more organisations.



3,491

Home Help Clients



172,124

Supported Hours



356

Home Help Workers

Home Help Customer Care Team

Our Home Help Customer Care Team was set up 3 years ago with the aim of providing a more positive customer journey. We want people to feel that we care about them, that we are committed and that they can trust us.

- Recruitment of Home Helps and monitoring service standards. Improving training and spot checks on Home Helps to ensure quality standards are being maintained.
- Customer Care Team work with hubs as a team to support the operational side of the service.
- Deal with compliments and complaints in a positive and appropriate manner in order to resolve them satisfactorily.

Achievements

- Increased the amount of feedback we receive by contacting more clients and making changes where we can based on their views. Updated the client satisfaction questionnaire sent out to all clients to gain clearer insight.
- Building networks with other organisations and raising awareness of our services, as requests are regularly received from other organisations for our literature to promote services. Attend events across the county.
- Improved relationships with Home Help workers by keeping them informed and passing on compliments to them.
- Increased circulation of literature throughout the county.

Future Plans

- To merge the Home Help Customer Care Team with the Toenail Cutting Service Team to increase customer service and satisfaction levels across services.
- Expand both services.

Volunteering

The focus of the Volunteer Team is to:

- Recruit, train and support volunteers with the relevant skills to help us deliver our services
- Match volunteers to roles that will fulfill their needs, requirements and aspirations
- Provide an offboarding service for members of the public, but who are interested in volunteering with older people in Essex whom we cannot place

Highlights throughout the year

- 63 new volunteers started with Age UK Essex over the year
- Our total number of volunteers at end of March 2018 was 325
- Secured funding from ECC from April 2018 - March 2019 to support the volunteer offboarding service
- 123 people were placed with external organisations working with older people across Essex through the volunteer Recruitment Consultant Role
- Implemented a new Volunteer Relationship System (Salesforce), customised for our requirements to manage, streamline and support the recruitment and management of volunteers
- The total number of hours volunteers have given throughout the year amounted to 32,271 (this figure excludes travel time)
- Based on the current living wage (£7.83) this is equivalent to nearly £253,000 if we were working with salaried staff

Our Future Plans

- We want to work towards becoming a more volunteer led organisation, maximising opportunities for volunteers across the organisation. More people are now using volunteering to help develop a career, learn new skills or expand their CV. We want to develop new roles to encourage these people to volunteer for us, to develop their knowledge base, whilst increasing our staff support.
- Look at developing more short term and one off roles to attract younger volunteers and those that do not have the time to volunteer on a regular basis. We will be working closely with Anglia Ruskin University and colleges to help us recruit younger volunteers.
- We would like to reduce the percentage turnover of our volunteers.
- We want to make sure we keep the volunteers we have, so we will be reviewing our support, supervision and monitoring procedures. If our volunteers are recognised, feel valued and supported we hope they will be more likely to stay with us longer.

325

Our Volunteers

32,271

Volunteering Hours

304

Volunteering Roles

Case Study



Congratulations to Phill Moore who was highly commended for the Mayor's Award for Outstanding Contribution to Voluntary Service in Chelmsford.

Phill is a Telephone Befriender and also volunteers for the Home Help Customer Care Team. As well as his weekly befriending calls, Phill also contacts our Home Help clients to see if they are happy with our service and has spoken to over 600 clients in the time he has been with us! Thank you Phill, and thank you to all our volunteers.

Human Resources

The board of Directors, who are the Charity's trustees, and the senior management team comprise the key management personnel for the Charity, in charge of directing and controlling, running and operating the Charity on a day to day basis. We are reliant on retaining experienced and capable staff and there are a number of elements we use to achieve this. We ensure that all staff are properly motivated, trained, developed and managed and are remunerated on a basis consistent with their role and responsibilities.

453

Age UK Essex Staff

1,237

Job Applicants

6

Age UK Essex Offices

Befriending

Age UK Essex continues to work passionately every year to fight the impact of loneliness and/or social isolation through its Befriending Services.

Age UK Essex Befriending is a free service for anyone over 60 who is feeling lonely and/or socially isolated. We receive referrals from many organisations but encourage people to self refer.

We currently support a total of 495 clients and utilise the talents of 141 Befrienders, achieving over 500 volunteer hours a month.

We have funding secured from Thurrock Council for a comprehensive Befriending Service in Thurrock, and are able to deliver Telephone Befriending, Home Befriending (support within the home), and Active Befriending (support outside of the home) in this area. We are currently not operating a waiting list here and have capacity for new clients.

Countywide we receive funding from Essex County Council although there are some regional variations. In Brentwood, Basildon, and Billericay all 3 types of Befriending are supported and there is capacity for new referrals.

Case Study

Mrs K is 81 years of age, she was referred to the Befriending service by a family member in March 2017. At this time Mrs K was living with anxiety and feeling generally low and isolated as she did not have much social interaction.

Age UK Essex immediately arranged a weekly telephone call, our volunteer telephone befriender said it took some time to build a rapport with Mrs K, now they enjoy a good chat. Mrs K has since stated that the trust and friendship she has developed with the telephone befriender has enabled her to become more confident and her anxiety has reduced.

6,888
Volunteering
Hours

495
Befriending
Clients

Community Engagement

As part of the Community Agents project, the Voice Network's team of specially trained volunteers continue to attend events and visit clubs and groups across Essex, giving talks about the services and facilities available to older people in their local area.

Passionate about their local community, Voice Network volunteers inform their audiences about Age UK Essex services, Community Agents Essex and the help and support available from other organisations. They in turn disseminate information to their neighbours, family and friends. The Voice Network also gives older people a voice within their community - volunteers collect their views on support services and gaps in services and feed back to key decision makers.



Feedback following a Voice Network talk:

"I want to thank you for coming yesterday and letting us know more about Age UK Essex. Feedback was very good and your involvement in the interactive session was just the best.... We look to collaborate further with Age UK Essex in the very near future and we hope we can count on Age UK Essex to continue to give us support as we grow our organisation.

Your volunteer was an excellent speaker and is also a good person who bonded very well. Age UK Essex is lucky to have him."

Toenail Cutting Service

The Toenail Cutting Service operates throughout Essex, providing a much needed service to people who are unable to cut their own toenails.

The service was launched in 2001 and consisted of one mobile van that travelled across Chelmsford. The service now has over 104 venues where the toenail cutting service is hosted, and we also provide a home visiting service across Essex for people who are unable to access the venues.

As there is a very high demand for the home visiting service, we will recruit additional trimmers to meet the need for this. We aim to expand the venues to create a more accessible service.

Case Study

Mrs B had recently spent several weeks in hospital after she had a fall, she was referred to the toenail cutting service by her daughter in February 2018.

It was disclosed that Mrs B is a type two Diabetic and is taking blood thinning medication, she also had a leg ulcer and short term memory loss. The information that was disclosed is important as it enabled us to provide the correct trimming procedure for Mrs B. We do not cut the nails very short for people who are diabetic as this can cause infection to the toes. The leg ulcer also made us aware that the client had poor circulation.

Mrs B has been receiving regular toenail trims to address the issue of her long nails. Her first appointment was in February 2018. The service operates on an eight weekly rotation so she has attended further appointments in April, June and August.

In August 2018 it was apparent that her nails were looking healthy in comparison to her first visit. Mrs B's mobility has improved and she is now able to go out as she is able to wear outdoor shoes.



Increase
in home visits
across Essex



Venue Toenail
Trims



Home Visit
Trims

Trading

Age UK Essex Trading earn commission on the sale of every product and service. For the year ending 31 March, 2018 Trading made a profit of £113,162 and this amount was gift aided to the Charity, providing the unrestricted income which enable services to continue to operate.

Our team of expert arrangers support customers to access the right products and services for them. Every arranger is highly trained, dedicated and provides excellent customer care before, during and after all sales. That is why our customers return year after year. Between them our current arrangers have 39 years' experience working within our Trading Company.

The Products and Services provided are designed with the over 50s in mind and include:

- Home Insurance
- Motor Insurance
- Motor Breakdown
- Travel Insurance
- Funeral Plans
- Personal Alarms
- Equity Release Advice Service
- Legal Services
- Weekly Lottery
- Stairlifts
- Easy Bathing
- Adjustable Beds

4,982

Home

2,716

Car

859

Travel

56,261

Lottery

186

Motor Breakdown

282

Personal Alarms

129

Funeral Plans

Age Co Insurance is arranged by Age UK Enterprises Limited and arranged and administered by Ageas Retail Limited, who are both authorised and regulated by the Financial Conduct Authority.

Age Co Motor Breakdown Insurance is provided by Call Assist Ltd.

Age Co Funeral Plans are provided by Advance Planning Limited, a subsidiary of Dignity plc.in association with Age UK Enterprises Limited..

Age UK Personal Alarms are provided by PPP Taking Care Limited and brought to you by Age UK Trading CIC.

The Age Co Equity Release Advice Service is provided by HUB Financial Solutions Limited.

Age Co Legal Services offers legal advice and support, through Irwin Mitchell LLP.

The Weekly Lottery is promoted and administered by Age UK Enterprises Limited, a commercial services arm of Age UK (Charity No. 1128267).

Age Co Funeral Plans, Age Co Equity Release Advice Service and Age Co Legal Services were previously sold under the trade name Age UK Enterprises Limited.

Age UK Enterprises Limited (registered in England and Wales, No. 3156159) is a commercial arm of Age UK (registered charity No.1128267) and donates its net profits to Age UK.

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Financial Summary 2017/18

Income		Expenditure	
Donations and Gifts	£46,683	Advocacy	£262,794
Investments	£8,833	Befriending	£203,154
Legacies	£19,256	Home Help	£2,300,732
Fundraising	£27,975	Information and Advice	£121,664
Age UK Shops	-	Toenail Cutting	£391,205
Trading Subsidiary	£233,798	Community Engagement	£145,861
Grants	£529,786	Volunteer Management	£99,925
Contracts	£73,058	Trading Subsidiary	£120,636
Fees	£2,765,554	Income Generation	£124,294
Other	£81,541	Governance	£43,582
		Head Office	£103,332
Total	£3,786,484	Total	£3,917,179

Treasurer's Report

Most of the Charity's income is derived from grants, statutory funders and from contracted services. Total income for this was £3,786,484 (2016/2017: £4,299,677) against total expenditure of £3,917,179 (2016/2017: £4,217,789). This resulted in a deficit during the year of £130,695 (2016/2017: surplus £81,888).

Our trading subsidiary has once again made a major contribution with a profit of £113,162, although this was £62,032 (35%) less than the profit achieved in 2016/2017.

During the year we received grants of £355,779 (2016/2017: £344,752) from our statutory funders, £73,058 (2016/2017: £154,052) from contracted services and £174,007 (2016/2017: £221,953) from other grant sources.

The Charity's investments are governed by its Constitution. This permits the funds not immediately required by the Charity to be invested as agreed with the Directors, provided that the Board seeks professional advice from a suitably qualified person before exercising such powers. The Charity's activities require funds to be available at short notice and therefore the Treasury policy determines that surplus funds should be retained on short-term deposits spread across a range of financial institutions.

Our reserves totalled £1,853,746 at 31st March 2018, of which £393,035 (21%) are restricted funds, £476,000 (26%) are designated funds and the balance of £984,711 (53%) are unrestricted funds. The general reserves held at the year end are equivalent to approximately three months of total expenditure, in line with the reserves policy.

Mr C Ignatowicz

Treasurer

External Quality Audit holds Age UK Essex in high regard

Age UK Essex is a brand partner of the national Age UK Charity which enables the charity to share the name and logo of its counterpart. Whilst both organisations fundraise and deliver services completely independently of one another, as a brand partner Age UK Essex complies with a number of audit activities in order to remain an eligible local brand partner. This year we successfully completed a Charity Commission approved external quality audit assessed by a company called SGS.

This audit process applies to Age UK itself and to all local brand partners. It applies to all parts of the Charity and this year involved Trustees, Managers, Staff and Volunteers. It assessed 14 key operational areas of Age UK Essex, focussing on safeguarding, strategic risk, financial control and data management in particular. It verifies that, as a charity, we are legally compliant, financially sound, operationally safe and adopting best recommended practice where applicable to the services we deliver.

The assessment was split into two distinct parts: evidence across the areas of finance, health & safety, safeguarding, data management, volunteering, recruitment, risk management and fundraising all had to be provided two months before the assessment date, so that they could be audited externally against a benchmark of national standards and verified as compliant. The second part of the assessment took the form of a full day which included a two hour presentation about the county of Essex, the demographics, our services and our corporate governance procedures, followed by focus groups with our Trustees, Staff and Volunteers. It was also a physical check on documentation, such as insurance policies and safety checks.

It was a full team effort - everyone across all services had a part to play in gathering the evidence for the assessor. The result was successful and the external Quality Award was awarded to Age UK Essex, providing strong evidence that Age UK Essex is committed to delivering services of a high quality for our clients.



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