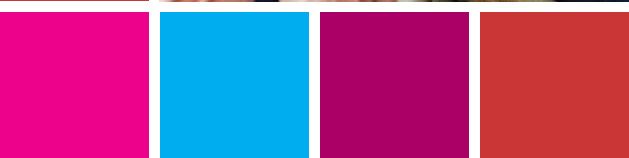
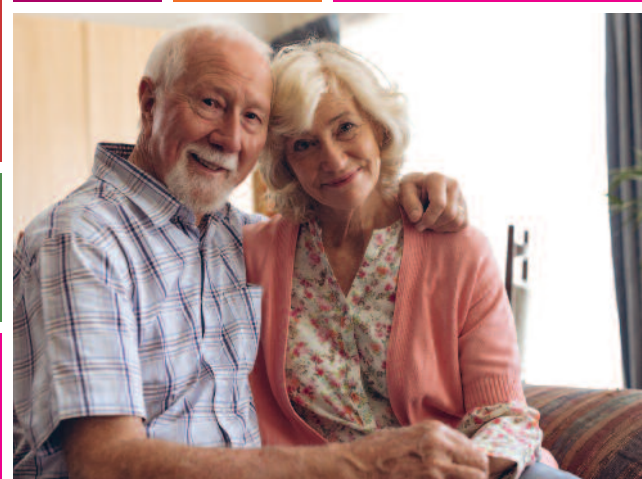
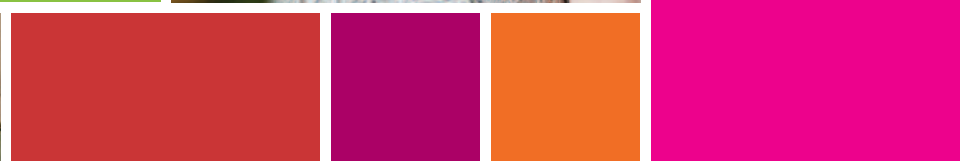


Annual
Review

2019/ 2020



Helping people in Essex
to live well in later life



Chairman's Report



Welcome to the Annual Report 2019/2020 for Age UK Essex. This document provides details on how we have supported older people across the whole of the county of Essex during the last financial year, as well as the challenges and opportunities we face.

The Board of Trustees and Chief Executive agreed the key priorities for 2019-20. However, the events of Covid-19 towards the end of the year had a traumatic effect on the charity, and finances and it's staff. This was particularly unfortunate, as in terms of general and overall performance it was a good year.

Impact of Covid-19 - In March 2020 the Charity closed its Toenail Cutting Service. In April 2020 we suspended our Home Help Service. On 22nd June 2020, the Board of Trustees took the difficult decision to also close the Home Help service, as the Charity could not guarantee to fulfil its duty of care to both staff and clients due to the Covid-19 pandemic. The Charity's income pre Covid-19 was predicted to be £3.6 million. The closure of these services has meant a forecast estimated loss of the Charity's unrestricted fee income predicted to be £3.1 million (20/21). The unrestricted surplus generated from the Home Help and Toenails service was predicted to be around £228,000 in 20/21 pre Covid-19, this surplus income will not now be realised. The priority for Age UK Essex

going forward will be to focus on our fundraising efforts through Trust and Grant programmes, individual giving, regular donors and digital fundraising, with the aim to increase unrestricted income, to enable long term financial sustainability.

Plans for the future

The immediate priority for the board of directors is to assess the current situation and work with the Chief Executive to develop plans to mitigate the effects of the recent challenges we have been faced with as a direct result and impact of Covid-19. We will aim to provide a network of services which will particularly focus on social contact and to serve as an alternative measure to our face to face services that have been closed. In addition, we will also be looking at more effective and productive ways we can continue to support our staff and clients. It is without question that one of the biggest challenges for the charity going forward will be fundraising. This area is critical to financial sustainability and will be a key driver and contributor to any future plans and securing the financial future of the charity.

Many thanks.

Mike Mahoney
Chairman

Summary of stats

4,241	Clients supported with complex information and advice
38,500	People reached through our services and products
327	Less lonely people thanks to our team of befrienders
Over £1.7m	Secured benefits on behalf of our clients
2,261	People received friendly, reliable and trusted support in their homes
80,000	People over 65 living in Essex are likely to be lonely *Essex County Council Isolation Index
8%	Of people over 65 will have a dementia diagnosis by 2037
35%	More people will be over the age of 75 by 2025
18,674	Bobble hats knitted by our amazing knitters raising £2,409 as part of The Big Knit, Age UK and Innocent Smoothie campaign

Chief Executive's Report



It gives me great pleasure to present to you our annual review, 2019/2020. In the past year we have continued yet again, to retain a clear focus on ensuring all clients using our services are supported.

We continue to look to the future knowing that our population is ageing, and demand for our services is increasing, with our clients presenting with ever more complex issues. Whatever issues the charity is faced with, we remain relevant and committed to our core mission to help people in Essex to live well in later life.

We have been committed to the following organisation aims:

- To identify principal areas of need across Essex and enable older people to live independently with confidence
- To help alleviate the debilitating effects of loneliness and social isolation, to include encouraging more older people to volunteer with us by sharing their life long skills to enhance our services
- To provide information, advice and guidance for older people, their families and their carers
- To provide excellent customer care and expand our services, in order to reach more people and deliver a positive contribution to the Charity through our fundraising efforts
- To ensure that we operate without discrimination and that all money raised in Essex is for the people of Essex

As you will see from the review, we have consistently worked towards achieving our priorities with positive results despite the challenges of decreased funding, increased demand on services and the onset of a global pandemic.

Towards the end of the year, and like most, Age UK Essex were faced with one of our biggest unprecedented challenges yet with the outbreak and impact of Covid-19. As a response to the pandemic, all of our services were immediately reviewed in order to comply with all relevant Government advice and guidance which, in turn, affected the usual delivery of the charity's face to face services.

The enormous impact of Covid-19 has put pressure and expectations on our staff and volunteers like never before, but through sheer dedication and compassion for our clients, their loyalty and commitment has remained, and never faltered. Not forgetting the immediate and incredibly generous offers of help from members of the general public.

We are extremely proud, appreciative and grateful for all of our staff, volunteers and Trustees support and hard work. It is a privilege for us to lead such a committed group of people; we cannot thank them enough for all their hard work and support and total dedication to the charity.

We now look forward to rebuilding our services for the future to reflect the alternative measures we have put in place which will enable us to continue to benefit the older people of Essex.

Diane Nicola
Chief Executive

Knowing where to turn to



Our **Information and Advice Service** provides free, impartial, confidential advice to family, friends, carers and older people about:

- Benefit advice
- Housing & care options
- Social care advice
- Legal and financial information
- Bereavement Signposting
- Local services

Service updates for 2019/2020 - Despite the challenges of providing services with very little income, 2019/20 was a successful year. We increased our service offer and attracted some additional funding. We were able to attract new volunteers and delivered a greater number of advice sessions for vulnerable older people across Essex and beyond.

4,241 clients and/or carers provided with professional information and advice

£1,136,655 of money accessed in additional benefits



Alan: "Age UK Essex has helped me to avoid homelessness. I live in a council house which has been paid for by my benefits, but due to my age I was told that I would start receiving my state pension and in doing so I would no longer receive these benefits. There was no way I was going to be able to afford my rent as well as council tax and I was afraid I'd be evicted. Just by asking the questions no other agency has bothered to find out about, Sue at Age UK Essex was able to get me the right benefits I needed and simplify the whole process. Nobody else has taken the time to ask or listen to me. It has made a huge difference to my life."



Giving people a voice



The **Advocacy Service** aims to provide help to the most vulnerable members of our society, enabling people to have their voices heard in how their care, support and funding needs are met, allowing people to be involved in decisions about their lives, exploring choices and options.

Unfortunately in 2018-19 the Advocacy service was unsuccessful in further securing its partnership contract of 10 years and the countywide advocacy contract passed to another provider, which in turn, resulted in the loss of highly trained and experienced staff. It was disappointing for the charity to lose the ability to deliver its own advocacy service. However, we have still been able to accomplish some successes. We continue to work with the West Essex Clinical Commissioning Group with the Smart Life project and with Essex Partnership University Trust (EPUT), in Castlepoint and Rochford, on their excellent Care Co-ordination service as a result of the exceptional service delivery we achieved.

Advocacy services (Smart Life, Care Coordination and Formal Advocacy) were made available to over 1,300 people in all parts of the county.

43 people received advocacy support

977 people supported through Care Coordination

359 people supported via the Smart Life project

£634,000 of unclaimed benefits and care costs recovered

Charlotte: *“I went to support Frank as a base level Occupational Therapist. He was depressed and had multiple physical illnesses. The care plan he was receiving was unsuitable and a breakdown in relationship with the warden at his assisted living facility was not helping him. Lonely, depressed and unable to get out and about Frank was finding accessing the right help very difficult. Liaising with Social Services proved a challenge as he was initially under the duty Social Worker and so accessing reliable information was very difficult. Eventually he was allocated his own social worker from the disability team. It took awhile for me to gain Frank’s trust but eventually I was able to support Frank by listening to his needs and concerns and attending meetings with social services to make sure his voice was heard. After 3 months of working with Frank we were able to have his needs reassessed, offer him a range of alternative care providers to meet his needs and refer him to the befriending service. A review of his medication was carried out and were amended to support Frank’s mental health. All in all I was really happy with the outcome for Frank, as was he.”*



Creating friendships to help combat the impact of loneliness and social isolation



The mission of the **Befriending Service** is that everyone should have someone or somewhere to turn to if they want it.

According to the Essex County Council Social Isolation Index there are over 80,000 older people living in Essex who are likely to be lonely and living in social isolation.

Our well established countywide Befriending Service continues to operate on a smaller scale with the main focus being on telephone Befriending across Essex, whilst continuing to deliver a more traditional Befriending Service in Thurrock. We have secured funding from Thurrock Council for 3 years and the Morris Beneficent Fund for our Countywide Service for 2 years.

443 clients were talked to or visited by a Volunteer Befriender on a regular basis.

129 Befriender volunteers

35 Calls to lonely older people on Xmas day 2019

Since receiving the friendship of our team of Befrienders, the following has been reported.

100% of clients have maintained or improved mood

99% of clients have maintained or improved confidence

99% of clients have maintained or improved motivation

97% of clients have maintained or improved independence

97% of clients have maintained or improved social inclusion



June: *"I'm a tough old bird. I've had cancer three times and I'm still here but after my husband died I felt lonely for the first time ever in my life. It was horrible. My Home Help told me about the Befriending service. Bernie calls me once a week. She is a true blessing, a wonderful listener, all my problems seem to melt away whilst we chat. Age UK Essex never lets me down".*

Supporting the local community



The **Voice Network's** team of specially trained volunteers have continued 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. Following a change with how the project is funded the Voice Network has continued as an independent Age UK Essex venture since November 2019.

Passionate about their local community, our Voice Network volunteers help older people, their families, friends and carers, by delivering talks and attending events to share their knowledge about local services and social activities. Our volunteers signpost to relevant organisations and support groups enabling older people to make informed decisions and, where possible, aid independent living and reduce social isolation. They also listen to how people feel about local services and the key issues affecting older people's lives.

10 Voice Network volunteers have delivered talks across Essex

133 Voice Network talks and events

Over 3,000 Voice Network talk and events audience

Over 31,000 People reached as part of wider community engagement by Age UK Essex, including distribution of Guides To Our Services

198 Wider Age UK Essex talks/events

Lunch club organiser: *"The talk was really informative and helpful and the speakers local knowledge was exceptional."*



Volunteer: *"Once I started giving talks to groups about the services that Age UK Essex offers, I realised how useful many older people found the information, and I became really keen about spreading the word. And I've met lots of really lovely people, a very positive bonus!"*



Volunteering



Volunteers have always been a vital part of the running and success of Age UK Essex, helping us to make a difference in the lives of older people living in Essex.

During 2019/2020 a total number of 239 volunteers contributed 12,322 hours of their time supporting our services such as befriending, information and advice, fundraising and administrative support. If all this work had been completed by paid staff it would have cost the charity over £101,164, based on the National Living wage at the time.

Volunteers were invited to celebrate national Volunteers Week in June where Chelmsford Voluntary Service organised VolFest, a market stall event in Chelmsford High Street attended by local MP Vicky Ford, BBC Essex and other local charities. Volunteers were joined by staff and the Age UK Essex mascot, Ollie the Owl, to share information about how to become a volunteer for the charity. Volunteer meetups were organised to bring our volunteers together and thank our amazing teams for the time they give to support the charity.

The volunteer department worked with Anglia Ruskin Voluntary service to reach out to younger people and promote volunteering for the charity as well as gaining their support of the Christmas Giving Tree initiative.

A new training initiative was developed by the Training Officer and Volunteer Team to expand training in GDPR, safeguarding, loan sharks, organisational inductions and refresher training.

The Volunteer service responded quickly to the effects of the coronavirus by implementing fastrack training and recruiting volunteers to make wellbeing calls and emergency food parcels in March 2020.

239 Volunteers providing support across the organisation

12,322 Hours of time given by volunteers to support our services



Maria: *"I decided to become a telephone befriender when I retired from work a year and a half ago and wanted to give something back. I have always enjoyed talking and looking after people. I love speaking to my clients and feeling like I make a difference, some of them may have not spoken to anybody else since my previous call. I have spoken to some lovely people. We chat about our lives and what we enjoy doing. We share stories about our families and our histories, I feel when we're talking they generally are really interested and become part of your extended family. I thoroughly enjoy the time I spend bringing companionship to some of those who spend the majority of time alone."*

Home Help Service



The Home Help service was suspended in March 2020 and closed permanently on 22 June 2020. The Board took the difficult decision that it could not guarantee to fulfil the duty of care to both staff and clients by continuing the service given the ongoing Covid-19 pandemic.

The Home Help Service was originally set up over 20 years ago covering mainly low level practical support such as housework, a sitting service, outdoor activity support and shopping. The service has never provided any type of personal care.



Toenail cutting service



In March 2020 the charity closed its Toenail Cutting Service in part due to the impact of Covid-19. The Board of Trustees for Age UK Essex has decided not to show statistics for this area of the charity, since to do so might mislead readers as to their long term viability.

The service was launched in 2001 and consisted of one mobile van that travelled across Chelmsford. At the time of closure the toenail cutting service visited over 90 venues and provided a home visiting service across Essex for people unable to access venues.



Customer Care Team



Due to the closure of the Toenail Cutting service and Home Help service, the Customer Care service closed in September 2020 as an indirect result of Covid-19.

The Customer Care Team was primarily set up in 2015 to support the Home Help Service with the aim of providing a positive customer journey, making people feel cared for and providing a committed and trusted service. In 2018 the team evolved to merge the Toenail Cutting service team to increase customer service and satisfaction levels across both services.

Trading



On 1st April 2018 the Trading Alliance Member ("TAM") model was restructured by Age UK Enterprises across the network resulting in the former 76 TAMs being reduced to 30.

Age UK Essex Trading chose to remain one of the members, but despite these efforts to restructure the network in order to become more profitable, in common with all TAMs, Age UK Essex Trading saw a steady decline in business which had a significant impact on the level of income that was gift aided to the Charity.

In the face of this declining business, with effect from 31st January 2020 Age UK Enterprises closed down the TAM network. Age UK Essex Trading therefore had no choice but to cease trading.

The figures below therefore relate to the period from 1st April 2019 to the date of closure.

Household commission	£52,000
Travel commission	£7,100
Motor commission	£37,700
Motor breakdown commission	£1,000
Funeral plan commission	£1,700
Personal alarms commission	£2,500
Lottery commission	£1,100
Other income	£8,200

The Trading service made a profit of £17,600 and this amount was gift aided to the Charity, providing the unrestricted income which enabled services to continue to operate.

Over the period that Age Concern Essex and then Age UK Essex traded they contributed over £1 million to the income of Age Concern Essex and Age UK Essex, and therefore to the support of older people in Essex. This was due in no small part to the expertise and hard work of the Trading Manager and the team.

Fundraising



The **Fundraising team** continues to engage with a wide range of individuals and organisations to raise much needed funds. Through our fundraising campaigns and amazing generosity of the people of Essex we have raised over £32,000 that will help us to deliver our vital free services.

Our staff, volunteers and trustees have helped to increase our presence and profile across Essex. As part of our community engagement we have attended events and visited clubs and groups; delivering talks about the facilities available to older people in their local area via the Voice Network.

We have welcomed the opportunity to engage with Marks and Spencers, Leonard Gray Solicitors, who delivered our very successful Wills month contributing nearly £700, schools, The Essex Walking Football League, the Therapy Services team at Broomfield Hospital, The Rotary Club of Grays Thurrock, Lingwood Bridge Club and Marconi to name but a few, to raise much needed funds.

Our Big Knit campaign grew from strength to strength this year. Our target of 18,000 hats was quite a challenge, but our dedicated team of knitters once again did not let us down and rose to the challenge - our final count was a staggering 18,674 little hats for the Age UK Innocent campaign, raising £2,409.25



Therapy Services bake sale at Broomfield Hospital



Giving Tree at Anglia Ruskin Voluntary Service

Our Christmas Giving Tree campaign in partnership with The Meadows Shopping Centre Chelmsford and Anglia Ruskin University was a great success receiving over 500 donated Christmas gifts from the local community. All presents were distributed to vulnerable older people in Essex. Thank you to everyone who helped to make this special event happen.

In August 2019 our brave volunteer riders took part in the Prudential Ride London, completing the 100 mile challenge and raising over £1,800 for Age UK Essex. Well done and a big thank you to everybody who completed the event!

£378,052	Raised in grants
£32,392	Raised in donations
£80	Raised in legacies
£40,779	Raised in fundraising events

Financial Review 2019/2020



Income

Donations & Gifts	£32,392
Investments	£10,294
Legacies	£80
Fundraising	£40,779
Grants	£378,052
Trading subsidiary	£111,417
Fees	£2,856,015
Other	£21,325
Total	£3,450,354

Expenditure

Advocacy	£212,178
Befriending	£95,019
Home Help	£2,318,560
Information & Advice	£81,548
Toenail Cutting	£533,298
Community Engagement	£26,716
Volunteer Management	£61,104
Trading Subsidiary	£93,811
Income Generation	£52,829
Governance	£71,746
CAPE	£96,311
Head Office	£66,020
Total	£3,709,140

Treasurer's Report



Most of the Charity's income is derived from grants, legacies, statutory funders and from contracted services. Total income for this year was £3,450,354 (2019: £3,554,234) against total charitable expenditure of £3,709,140 (2019: £3,565,104).

This resulted in a deficit during the year of £258,786 (2019: deficit £10,870).

Our Trading subsidiary has once again made a contribution with a profit of £17,606, although this was £41,634 (70%) less than the profit achieved in 2018/19.

This year legacies of £80 (2019: £17,050) have been gratefully received together with other voluntary income of £32,392 (2019: £24,951). During the year we received grants of £174,745 (2019: £266,289) from our statutory funders and £203,307 (2019: £137,687) from other grant sources.

The Charity's investments are governed by the 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 £1,584,090 at 31st March 2020, of which £144,984 (9%) are restricted funds and £1,439,106 (91%) are unrestricted funds. The general reserves held at the year end amount to more than three months of total expenditure, in line with the reserves policy.

Chris Ignatowicz **Treasurer**

Age UK Essex Quality Standard



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. In July 2018 we successfully completed a Charity Commission approved external quality audit assessed by a company called SGS.

This certification applies to Age UK itself and to all local brand partners. It applies to all parts of the Charity, involving 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. This year we

have continued to review the Charity's governance, risk, controls, processes and systems which verifies that, as a charity, we continue to be legally compliant, financially sound, operationally safe and adopting best recommended practice where applicable to the services we deliver. Our main focus this year being our information Governance Systems, so that we comply with the regulations around GDPR and how we handle and store data.

The Charity will continue to review our working practices, Age UK Essex is committed to delivering services of high quality for our clients for the future.



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