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#### Foreword by our Chair of Trustees - Robert Rankin

Since 1986 our vision has been for Herefordshire and Worcestershire to be a great place to grow older.

Our two counties offer a mix of urban and rural dispersed communities across two of the largest counties in England. Just under 354,000 people over 50 live in Herefordshire and Worcestershire (ONS, 2020), representing a growing population and one that is higher than average for England and Wales.

This context provides the backdrop for the increasing demand for our support and services as well as our endeavours to provide the rich mix of activities to support the diverse needs and interests of our older population. During the year we have offered a range of support and services to over 11,000 older people.

What we have been able to offer has, of course, been affected by the Covid-19 pandemic but I am very proud of the way we continued to support older people, their families and carers throughout a very challenging period.

Where it has been safe to do so, we reinstated face to face services which have been gratefully received by our clients, who endured significant isolation and loneliness as a result of the pandemic restrictions.

A particular area of focus has been to support activities which improve the quality of life for older people, their families and carers.

Our work in partnership with Worcestershire County Council and Worcester University's Association for Dementia Studies has enabled us to open two brand new Dementia Meeting Centres, providing a vital resource to those who have been diagnosed with dementia. The Meeting Centres support not just those people living with dementia, but also provide a lifeline for families and carers through carers' support meetings, access to further information and advice as well as peer support at specific carer's events.

We will continue to develop our services using a quality improvement approach based on feedback from our clients.

The dedication of our staff and volunteer teams has continued to be exceptional at a time when our clients have needed us more than ever, and we are very grateful to them for their commitment to maintaining a high standard of support in what have often been difficult circumstances. This has been reflected in the feedback we have received from clients both as part of our annual client survey (which demonstrates a high level of satisfaction with our services) and the comments our teams receive from clients.

We will build on this enthusiasm, developing our management team by ensuring that they have the skills and knowledge to lead our teams and develop confidence in leading improvements in our services.

Our Help at Home service has been hampered by the pandemic, with many older people choosing not to have our staff visit their homes throughout lockdown periods. Many clients reduced their service to door-step visits and shopping drop offs rather than wanting in home support. This was compounded by those staff needing to isolate after being in contact with those with Covid symptoms. However, by the end of the financial year we have seen our income return to pre-pandemic levels as well as a significantly increased demand for Help at Home Services.

We will continue to develop our paid-for-service provision.

Maintaining and improving efficient management and financial support for service delivery and growth has been a focus during the year.

Following feedback from our clients we have introduced the use of direct debits and card payments for those who prefer these methods, which has improved efficiency for both the Charity and our clients. We have been mindful of the impact that the restrictions on our service delivery have had on our finances and have introduced a monthly review of all service delivery areas, looking in detail at our income and expenditure. This gives us an up to date and detailed understanding of our financial position.

We will continue to refine our approach to financial management, ensuring that our reporting is transparent and understood by our teams so that they are able to make full use of the information available to them.

Partnership working is increasingly important for us to ensure that the needs of our clients are fully met as well as to ensure that we make the best use of our resources. We continue to invest time in developing partnerships with public bodies, particularly as the structure of the statutory sector evolves locally. Our Meeting Centres have been a platform for developing relationships with Age UK Bromsgrove, Redditch and Wyre Forest and our Kidderminster Centre is based in their premises and supported through referrals directly from their teams. Our Stourport Meeting Centre has been developed in partnership with Sanctuary Care who generously offered the use of their premises free of charge.

We have an important role to play in advocating for older people and our membership of panels and boards (including Worcestershire Adult Safeguarding Board, Dementia Programme Board, Worcestershire Voluntary Alliance and numerous Dementia Action Alliance groups), means that we are well placed to do this. We are active members of the Age UK regional groups and participate in groups focusing on developing fundraising, services and the volunteering elements of our work.

The Covid-19 pandemic has shone a spotlight on the need to understand how we can better support and reach clients who are in greatest need. We have begun a programme of work which includes a review of our data capture methods to ensure that we can accurately identify under-represented groups. This will give us better information to develop services where they are most needed.

Understanding the opportunities available to us as Age UK Brand Partners is important for us and we continue to maintain, oversee and respond to local and national initiatives. In recognition of the reduction in dementia diagnoses as a result of lockdowns and in anticipation of the sharp increase in diagnoses, once face to face diagnostic services resumed, Age UK H&W were successful in winning funding opportunities to deliver Maintenance Cognitive Stimulation Therapy and will deliver two courses starting in early 2022/23.

Finally, on behalf of the Trustees, I would like to thank Magda Priall for returning to take up the role of Chief Operating officer at a very challenging time. It is important to recognise the leadership during this period. We are pleased to welcome Julia Neal into the role of Chief Executive Officer and we are looking forward to working with her to further develop the Charity, in order to make a real difference by meeting the growing and diverse needs of our older adults in Herefordshire and Worcestershire.



#### **Message from incoming CEO - Julia Neal**

Looking forward to the year ahead, I know that we will continue to work through every challenge that comes our way. We may have a long road to recovery ahead of us, but we will get there. To support the organisation on this journey, we have refreshed our Organisational Strategy and focussed our immediate efforts on recovery and rebuilding as we move into the 'living with' COVID-19 world. We want to get back to doing what we do best – making Herefordshire and Worcestershire a better place to grow older.

The environment in which we deliver our support and services is changing rapidly and now, more than ever, it is vital that we build on existing partnerships and seek new ones where we have shared goals. This will enable us to extend our reach, particularly to those who need us most. we also need to make sure that we understand what support and services older people in Herefordshire and Worcestershire need and to ensure that we involve them in designing and evaluating our offer.

We are fortunate to have come through the pandemic in a relatively strong position, but need now to build on this and to look for ways of making our services more sustainable. The way we work has changed for ever, therefore we will also be focussing on ensuring that our IT infrastructure and data reporting is fit for purpose and will support our future aspirations. Most importantly, we need to invest in our people who are our most important asset and continue to make Age UK Herefordshire and Worcestershire what it is and will ensure that we can support more older people across our two counties.



### **Our Principles**

#### Ageism is unacceptable

We are against all forms of discrimination, we challenge unfair treatment on grounds of age, and we and represent the views of older people to ensure their voice is heard.

# All people have the right to make decisions about their lives

We help older people to discover and exercise these rights.

# People less able to help themselves should be offered support

We seek to support older people to live their lives as independently as possible. We believe people who are supported should be treated with dignity and respect in all supported settings.

# We believe in working with others to make Herefordshire & Worcestershire a better place to grow older

We recognise the value of collective action and where possible we will work with others, with diverse strengths, in our communities to ensure older people are cared about.

# Aim 1: Promoting Positive Attitudes to Ageing

Age UK Herefordshire & Worcestershire aims to promote a positive attitude to ageing covering all aspects of the lives of older people.

### **Objectives:**

- To treat all older people fairly and with respect, recognising their different needs, choices and values.
- To promote the value of older people in their communities and to each other.
- To increase awareness of opportunities available to older people.
- To enable older people to influence strategic planning and service delivery.
- To promote the contribution older people can make through their involvement in service provision.
- To identify and develop new areas of activity and training for older people.

#### **Outcome:**

Older people will feel more confident and involved to the benefit of all.

## Aim 2: Provision of Direct Support/Services

Age UK Herefordshire & Worcestershire aims to develop support and services identified as relevant to the lives of older people across the two counties.

### **Objectives:**

- To provide information and support to older people through direct service provision of a consistently high standard.
- To identify and develop new areas of activity to reflect needs and demands.
- To continue to work with under-represented groups and other agencies to ensure that all older people receive the services and support to which they are entitled.
- To develop and support partnerships within Herefordshire and Worcestershire to extend opportunities for service delivery.
- To raise awareness of, and to communicate, the work of the Organisation.

#### **Outcome:**

Older people will be able to live independently at home.

#### **Aim 3: Raising Standards**

Age UK Herefordshire & Worcestershire aims to encourage and support others involved in providing support to older people, across the two counties, to achieve the highest possible standards in the work they do.

#### Objectives:

- To support others working with older people to develop high standards of care.
- To support others working with older people to manage and maintain their high standards of care.
- To support others to ensure they treat older people with dignity and care.

#### **Outcome:**

Age UK Herefordshire & Worcestershire is recognised as helping establish the highest standards of support and care in all interfaces with older people.

# Aim 4: Internal and Organisational Resilience

Age UK H&W is robust and can adapt in an ever-changing environment and maintains quality back office functions to support the delivery of our aims.

#### **Objectives:**

- To maintain diversity of income streams.
- To maintain, review and update Finance Policy and Procedures annually.
- To implement and update financial software and processes as identified, including alternative payment methods to reduce admin burden.
- To ensure quality IT resources are available for staff to enable them to work in the community as well as from office bases.

#### **Outcome:**

Age UK H&W remains a viable, responsive and cost-effective organisation.

#### **Our Plan for the Year**

We reviewed and developed our strategy based on our understanding of the adverse impact Covid 19 will have on the economy, increased competition for resources and the impact of the changing public perception of charities and how they operate. We are also mindful of the outcome of any new Age UK Brand Partnership and Network arrangements. Our objective for the period was to consolidate our approach with a view to developing a new strategy effective from 2022. Our plan during the year has therefore been to:

- Maintain support to, and activities for, older people, their families and carers.
- Continue to focus on Quality of Life for older people, their families and carers.
- Maintain a financial balance within current restrictions on service delivery.
- Build the staff and volunteer teams' enthusiasm, ownership, expertise and commitment to continued, high quality client support.
- Maintain and improve efficient management and financial support for service delivery and growth.
- Maintain and grow relationships with public agencies, funding bodies, other Age UKs and VCS (Voluntary Community Sector) organisations.
- Improve reach into BAME (Black, Asian and minority ethnic) communities and develop support services as appropriate.
- F Regrow fee paying services to enable the organisation to continue to deliver underfunded service provision and build reserves for future years.
- Have oversight of, and respond to, local and national initiatives and the Age UK Network Development Plans as appropriate for the future of Age UK H&W.



## Our Legal and Administrative details



#### **Our contact details:**

Registered Office: Malvern Gate, Bromwich Road, Worcester, Worcestershire, WR2 4NB

Ross Office: 27 Palma Court, Brookend Street, Ross-on-Wye, HR9 7EE

Hereford Office and Activity Centre: Drybridge House, 40 St Martin's Street, Hereford, HR2 7SG

#### **Auditors:**

#### **Bishop Fleming LLP**

**Chartered Accountants** 

**Statutory Auditors** 

1-3 College Yard

Worcester

WR1 2LB

#### **Solicitors:**

#### **Harrison Clark Rickerbys**

5 Deansway

Worcester

WR1 2JG

#### **Bankers:**

#### **CAF Bank**

West Malling

**ME19 4JQ** 

#### **HSBC**

6 Broad Street

Worcester

WR1 3LH

#### **Our Board of Trustees**

Brian O'Connell
Caroline Smith
Mark Richardson
Charlotte Wood
Peter Evans
Michael Newitt
Keith Trafford
Robert Rankin, Chair
Margaret Wheatley (resigned 29 November 2021)
Michelle Worthing (appointed 7 February 2022)
Iain Balchin (appointed 9 May 2022)



#### A Year In Review

During 2022/23 we were delighted to add several new services to our portfolio of offers to clients. Funding was secured via the Meeting Centre Support Programme which enabled us to open two brand new dementia meeting centres in Kidderminster and Stourport in the early part of 2022. Funding was also secured for two further centres to be opened next year in Redditch and Bromsgrove.

Towards the end of the year we were also fortunate to secure funding to expand our reach into Herefordshire by working in partnership with Age UK Hereford and Localities and Hereford Council to provide a Digital Inclusion Service. This service launched in November 2021 and provides a combination of 1-2-1 support, group sessions and six week courses. For those without access to their own device, a range of tablets, smart phones and laptops were purchased for loan during their engagement with the service.



#### Referral Hub

During the year we have continued to develop our Referral Hub which acts as a **first point of contact**. Our Hub Team provides simple signposting and referrals to our own internal services and also to external organisations and services.

4242 calls received and supported



## **Information and Advice**

Our Living Well Team who support our clients with Information and Advice provided over 17,000 contacts and supported benefit applications to the value of £1,305,423.

Over £1 MILLION in benefits awarded



#### A Year in Review

## **Dementia Wellbeing Support**

**632 clients** were referred to us for post diagnostic dementia support, provided by our expert team of Living Well Coordinators.

Each client received a personalised service, ensuring their goals and aspirations were considered and incorporated into a plan, to enable them to live well with dementia.





# **Dementia Meeting Centres**

Our Meeting Centres in Droitwich Spa, Hereford, Stourport and Kidderminster reopened to clients when covid 19 restrictions were lifted in April 2022.

Throughout the rest of the year when lockdown restricted visiting, **1869 sessions** were provided across all our Meeting Centres in the two counties.

1869 sessions held



#### **Home Support**

Our Help at Home team received **359 referrals** for support with shopping, cleaning and general errands and provided over **11,000 visits** during the year.

# 11,000 visits during the year



## Home from Hospital

We supported **151 clients** following a stay in hospital and helped them regain their independence to live well within their own home and avoid a readmission to hospital.

# 151 clients supported



#### **Our Podiatrists...**

provided **274 appointments**despite strict covid regulations
being in place for a significant
proportion of the year. Our
podiatry service ensures clients
are able to maintain good
foothealth which reduces the
likelihood of trips and falls.

# 274 appointments



### **Companion Line**

Our 51 volunteer telephone befrienders provided **3764 calls** to isolated older people across the two counties.

# 3764 calls provided



## **Digital Support**

533 attendances were made at our digital cafes across Herefordshire & Worcestershire providing one-to-one support for older adults to improve their skills digitally, supporting their independence and wellbeing.

# 533 visits to our digital cafes



### **Training Solutions**

Our trainers delivered 233 courses to 1258 delegates through a combination of inperson and on-line teaching, in line with Covid-19 restrictions.

1258 delegates trained, 233 courses delivered



# Our team in 2021/2022

| Magda    | Praill             | COO                              | Barbara   | Walsh        | Help at Home Assistant   |
|----------|--------------------|----------------------------------|-----------|--------------|--------------------------|
| Julia    | Neal               | CEO                              | Amanda    | Kitteringham | Help at Home Assistant & |
| Jude     | Henderson          | Director Of Services             | Amanda    | Kitteringnam | Meeting Centre Assistant |
| Davina   | Burdon             | Director of Finance              | Corine    | Peart        | Help at Home Assistant   |
| Richard  | Walker             | Director of Finance              | Jayne     | Flaxman      | Help at Home Assistant   |
| Alison   | Weaver             |                                  | Klinda    | Jelfs        | •                        |
| Helen    |                    | HR Manager                       |           |              | Help at Home Assistant   |
|          | Kelly              | PA and Office Manager            | Anne      | Hawley       | Help at Home Assistant   |
| Sarah    | McDowall           | Marketing Officer                | Susan     | Caine        | Help at Home Assistant   |
| Gill     | Hutchinson         | Marketing Officer                | Julia     | Tandy        | Help at Home Assistant   |
| Bronwin  | Fragiotta          | Finance Team Leader              | Ruth      | Middlicott   | Help at Home Assistant   |
| Johanna  | Shearman           | Finance Officer                  | Kim       | Sheppherd    | Help at Home Assistant   |
| Tom      | Parson             | Finance Assistant                | Tracy     | Wilson       | Help at Home Assistant   |
| Teresa   | Isles              | Finance Assistant                | Caroline  | Anderson     | Help at Home Assistant   |
| Margaret | Stoneham           | HR and Payroll Assistant         | Vancess   | Gannon       | Help at Home Assistant   |
| Sarah    | <b>Evans-Young</b> | Befriending Co-ordinator         | Michele   | Balfry       | Help at Home Assistant   |
|          |                    | & Central Services Administrator | Rosemary  | Wood-Jones   | Help at Home Assistant   |
| Molly    | Allsopp            | Central Services Administrator   | David     | Bunn         | Help at Home Assistant   |
| Rachael  | Ford               | Home Support Manager             | Hilary    | Adams        | Help at Home Assistant   |
| Nicola   | Lannie             | I&H Team Leader                  | Helen     | Bough        | Help at Home Assistant   |
| Susan    | Murray             | Home Support Team Leader         | Helen     | Robertshaw   | Help at Home Assistant   |
| Heather  | Bullock            | Home Support Team Leader         | Shoana    | Salim        | Help at Home Assistant   |
| Loraine  | Reznik             | Home Support Team Leader         | Helen     | Dales        | Help at Home Assistant   |
| Jill     | Gibons             | Help at Home Assistant           | Mary Jane | Bryant       | Help at Home Assistant   |
| Linda    | Sinclaire          | Help at Home Assistant           | Naomi     | Jepson       | Help at Home Assistant   |
| Cathy    | Smith              | Help at Home Assistant           | Vicky     | Champ        | Help at Home Assistant   |
|          |                    |                                  |           |              |                          |



# Our team in 2021/2022

| Pushpa      | Parmar       | Help at Home Assistant      | Lisa       | Allsop       | Referral Hub Advisor                |
|-------------|--------------|-----------------------------|------------|--------------|-------------------------------------|
| Angela      | Townson      | Help at Home Assistant      | Jared      | Shinnie      | Home Support and CRM                |
| Jean        | Chapman      | Help at Home Assistant      |            |              | Administrator                       |
| Jacquiline  | Lamb         | Help at Home Assistant      | Marghanita | Franck       | Living Well Co-ordinator            |
| Christopher | Overden      | Help at Home Assistant      | Emily      | Bowsher      | Living Well Co-ordinator            |
| Margaret    | Johnson      | Help at Home Assistant      | Gemma      | Warden       | Living Well Team Leader (Veterans)  |
| Julia       | Ludlan       | Help at Home Assistant      | Steve      | Karrigan     | Living Well Co-ordinator            |
| Christine   | Jones        | Help at Home Assistant      | Anne       | Cummings     | Living Well Co-ordinator            |
| Rachal      | Blount       | Help at Home Assistant      | Barbara    | Greaves      | Living Well Co-ordinator            |
| Sophia      | Wagstaff     | Help at Home Assistant      | Carly      | Carter       | Living Well Co-ordinator            |
| Shelly      | Chandler     | Help at Home Assistant      | Philippa   | Gregory      | Living Well Co-ordinator            |
| Janet       | Burtenshaw   | Help at Home Assistant      | Karen      | SeQuira      | Living Well Co-ordinator            |
| Fiona       | Osborne      | Help at Home Assistant      | Sarah      | Turner       | Living Well Team Leader (I&A)       |
| Kate        | Franklin     | Help at Home Assistant      | Moica      | Jones        | Living Well Co-ordinator            |
| Angela      | Ridge        | Help at Home Assistant      | Kelly      | Baya         | Meeting Centre Service Manager      |
| Alsion      | Webb         | Help at Home Assistant      | Kim        | Malynn       | Living Well Co-ordinator            |
| Susan       | Hillman      | Help at Home Assistant      | Pam        | Graham       | Living Well Co-ordinator            |
| Julia       | Par          | Help at Home Assistant      | Heidi      | Arnold       | Living Well Co-ordinator            |
|             |              | & Home Support Co-ordinator | Helen      | Cook         | Living Well Co-ordinator            |
| Paula       | Monk         | Help at Home Assistant      | Michelle   | Pearson      | Meeting Centre Service Manager      |
| Cassie      | Stokes       | Help at Home Assistant      | Anne       | Gwinnett     | Living Well Co-ordinator            |
| Karen       | Gardiner     | Help at Home Assistant      | Alicia-Mae | Hussell      | Living Well Co-ordinator            |
| Victoria    | Marsden      | Help at Home Assistant      | Kimberley  | Jeffery      | Living Well Co-ordinator            |
| Shirley     | Williams     | Help at Home Assistant      | Caroline   | Savage       | Social Inclusion and Wellbeing      |
| Vicky       | Frith        | Help at Home Assistant      |            | J            | Manager                             |
| Kitty       | Chance       | Help at Home Assistant      | Julliette  | Kay          | Volunteer Co-ordinator              |
| Geraldine   | Nind-Edwards | Help at Home Assistant      | Anne       | Montgomery   | DSMC Supervisor                     |
| Helen       | Medows       | Help at Home Assistant      | Simon      | Scarratt     | Meeting Centre Assistant            |
| Linda       | Crean        | Help at Home Assistant      | Kathryn    | Hegarty      | Meeting Centre Assistant            |
| Paul        | Edwards      | Help at Home Assistant      | Deirdre    | Crammond     | Meeting Centre Assistant            |
| Rebecca     | Bennett      | Help at Home Assistant      | Pat        | Jones        | Meeting Centre Assistant            |
| Sian        | O'Brien      | Help at Home Assistant      | Helen      | Vaughan      | Meeting Centre Assistant            |
| o.a.r       | o Brien      | & Home Support Co-ordinator | Helen      | Steel        | Meeting Centre Assistant            |
| Jennifer    | Cox          | Help at Home Assistant      | Angela     | Davies       | Meeting Centre Assistant            |
| Nicola      | Meyrick      | Help at Home Assistant      | Lorraine   | Robinson     | Meeting Centre Assistant            |
| Robert      | Crawford     | Help at Home Assistant      | Priscilla  | Price        | Meeting Centre Assistant            |
| Eileen      | George       | Help at Home Assistant      | Joy        | Counley      | Meeting Centre Assistant            |
| Jane        | O'Brien      | Help at Home Assistant      | Christine  | Meredith     | Meeting Centre Assistant            |
| Harriet     | Thomas       | Help at Home Assistant      | Alison     | Fletcher     | Digital Inclusion Co-ordinator      |
| Anita       | Tabbernor    | Help at Home Assistant      | Sasha      | Merrett      | Referral Hub Advisor                |
| Sarah       | Clark Smith  | Help at Home Assistant      | Laura      | Simnett      | Companion Line Co-ordinator         |
| Louise      | Keys         | Help at Home Assistant      | Colin      | Hanley       | Training Co-ordinator/              |
| Emma        | White        | Help at Home Assistant      | Collii     | Trafficy     | Health and Safety Officer           |
| Amanda      | Payne        | Help at Home Assistant      | Angie      | Taylor       | Training Administrator              |
| Allex       | Exley        | Podiatrist                  | Anita      | Mullin       | Associate Trainer                   |
| Louisa      | Denyer       | Podiatrist                  | Lelsey     | Fraser-Young | Associate Trainer Associate Trainer |
| Sonya       | Murray       | Living Well Manager         | Penelope   | Beckett      | Associate Trainer Associate Trainer |
| Lisa        | Smith        | Referral Hub Advisor        | Pam        | Wood         | Associate Trainer Associate Trainer |
| Mandy       | Benn         | Referral Hub Advisor        | Anne       | McNaughton   | Training & Development Officer      |
| Manuy       | Dellii       | Referral Flub Advisor       | Elizabeth  | Loveday      | Digital Inclusion Co-ordinator      |
|             |              |                             | Selina     | Mead         | Meeting Centre Assistant            |
|             |              |                             | Jenna      | MICAU        | Meeting Centre Assistant            |

## **Communication and Campaigns**

We have focused this year on increasing our use of social media because we know that it will help us promote services and better develop our reach into our local communities. We use Facebook to share services, advertise upcoming events and to engage with local groups. This helps us to better target our audiences throughout Herefordshire and Worcestershire. We also have a growing following on Instagram which we use to share content to stories and our feed.

Developing an understanding of who we reach using social media is increasingly important. In order that we can use this approach effectively, we evaluate our analytics and insights on each social media platform, to understand the impact and success of our communications.





#### **Events**

24

During the year, we were still living under covid 19 restrictions. So there were limited opportunities for our teams to attend events, provide talks to promote our services and raise awareness of the issues affecting older people.

Many of these types of gatherings had to moved on-line where we were able to host, and attend, various meetings and events. During Dementia Action Week we hosted a series of Webinars to promote living well with dementia. We also ran a session specifically designed to support people who had recently had a diagnosis, with the aim of providing information about our services, support offered by other local Age UK Brand Partners, and providers of post diagnostic dementia support services in the wider voluntary and community sector. Further sessions were held to support professionals working in the health and social care sector with the aim of raising awareness of the services available for

them to refer people to.

#### We have worked with -

Herefordshire & Worcestershire Clinical
Commissioning Group
Worcestershire County Council
Hereford Council
Onside Advocacy
Worcester University Association of
Dementia Studies



## **Training**

We have trained health and care staff from the following organisations -

**Ashwell Home Care Services Ltd Care First Consultancy Midlands Ltd** Casa Mia Care Home **Civicare Community Housing Dan Hewitt Doves Care Focus Birmingham Full Care Solutions Headway Trust Worcester** HomeInstead Kidderminster **HomeInstead Warwick & Heartlands HomeInstead Worcester Joseph Brookes Newland Hurst Nightingales Norton Hall Nursing Home Orchestra of the Swan Ltd Primrose Hospice** 

**Pulse 8+ Care Services Reconstruct (Children and Adult** Services) LTD **Stanfield Nursing Home T.L.C. Home Care Services Tara Hitchen** The Mill House Care Home The Shrubbery The Woodlands Carehome **Tracy McGeever** tri.x **Truecare Uplifting Lives Services Valuecare VASA Worcestershire Association of Carers Westley Court Woodstock Nursing** Your Ideas Youth & Community Project



#### **Boards and Committees**

We sit on the following boards and committees -

Herefordshire VCSE Alliance
Worcestershire VCSE Alliance
Worcestershire Safeguarding Board
NHS Herefordshire and Worcestershire Dementia Programme
Board

Herefordshire Dementia Partnership
Worcestershire Dementia Partnership
Evesham, Hereford, Worcester, Malvern, Kidderminster
Dementia Action Alliances
Healthy Worcester
Wyre Forest Ageing Well Group

Worcestershire Armed Forces Covenant Operations Group
Herefordshire Armed Forces Covenant Operations Group
Worcestershire Armed Forces Covenant Strategic Partnership
Worcestershire VCSE Alliance Mental Health Advisory Group
Herefordshire Community Partnership

### Thank you to our funders and supporters

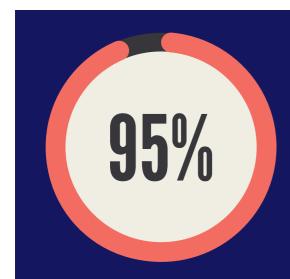
During the year we have received funding in the form of contracts or grants from the following organisations to whom we are very grateful.

Worcestershire County Council
Herefordshire Council
NHS Herefordshire & Worcestershire
The Armed Forces Covenant
The Big Lottery Fund
Eveson Trust
Droitwich Spa Meeting Centre
Age Concern Regional Support Services (West Midlands)
Age UK
Reconnections
Worcester Community Foundation
Awards4All (Lottery)
Sports Partnership H&W
University of Worcester
Community First Herefordshire

...And huge thanks to all our individual Donors, Supporters and Community Partners for working with us during the year. We would especially like to thank all those people who have left a gift in their will. These contributions help us to help those who need us the most and to really make a difference to older people in Herefordshire and Worcestershire.

# What our people say about us...

Our Team...



of our team **strongly feel**they make a difference
in their community



of our team feel valued and listened to

"I feel honoured & privileged to work with, & for, Age UK H&W & always feel valued by my manager & colleagues."

### What people say about us...

#### **Our Training...**

"Very **engaging** and **good content**.

Trainer interacted well with the group."

"All of it engaging, fun and informative."

"Easy, relaxed learning with **very knowledgable tutor**."

"Gave **lots of examples** for staff to understand and follow."

### What people say about us...

#### On Social Media...

"My aunt and uncle needed help during this coronavirus crisis. One message and they're bang on it. Aunt rung, shopping and contact sorted. Thank you from the bottom of my heart to you all."

"Great training day, full of fun and information. Has provided loads of useful ideas and information to our residents."

"It's wonderful to see so many Walking Sports initiatives across the two counties."

### **Governance and Management**

Age UK Herefordshire & Worcestershire is a trading name of Age Concern Herefordshire & Worcestershire and is a charity constituted as a company limited by guarantee, (registered charity number 1080545 and registered company in England and Wales number 3942023).

The charity is governed by a Memorandum and Articles of Association which sets out its charitable objectives:

- To encourage, promote and organise direct services appropriate to the needs of individual elderly people or groups of elderly people and if thought fit to make reasonable changes for any services provided.
- To promote and organise co-operation in the achievement of the above object and to that end to support, join in with and co-operate with other charities, voluntary bodies, statutory authorities and other organisations operating in furtherance of the object or of similar charitable purposes and to exchange information and advice with them.
- To establish, support, undertake or execute any charitable trusts, organisations or institutions formed for all or any of the objects.
- To promote and carry out, or assist in promoting and carrying out, surveys, investigations and research.
- To provide food, drink and refreshments as appropriate but only for persons participating in the activities of the organisation.
- To arrange and provide for, or join in arranging and providing for, the holding of exhibitions, meetings, lectures, classes and training courses.
- To publish books, pamphlets, reports, leaflets, journals, films, videos, tapes and other material.
- To appoint and constitute such advisory committees as the Board of Trustees may think fit.

### Governance and Management

Our Board of Trustees, who are also Directors of the Charity for the purposes of the Companies Act, have overall responsibility for the strategy, management and control of Age UK Herefordshire and Worcestershire. The Chief executive, working with the Executive Team, is responsible for delivering the Trustees vision and strategy and for the day to day operations.

Age UK Herefordshire and Worcestershire supports the principles of the Charity Governance Code fully and will continue to review our practice against the Code's requirements as part of an approach of continuously improving our governance arrangements, as the Code envisaged.

During 2022/23 we will review our Board effectiveness and approach to succession planning with the aim of retaining a balance of charitable and business skills and experience whilst also looking to develop the diversity of our Trustees.



### **Case Study**

Sheila, who was referred to us via The Reablement Team, is a very independent lady who is finding it increasingly difficult to walk any distance and is now virtually housebound. Despite this she remains very upbeat and is determined to stay in her own home.

Due to her mobility issues, Sheila is now finding personal care a struggle and after a recent stay in hospital following a fall, a six-week care package was put in place to support her, when she came home. However, she was found not to be eligible for this help to continue.

As household tasks became more difficult for Sheila, she considered employing a cleaner, but due to her low income, she realised this would be unaffordable.

Our advisor suggested to Sheila that she should apply for the Attendance Allowance and also to check if there are any other benefits she is entitled to. Sheila felt sure she that she would not be eligible for any benefits and declined the check. She did have a long discussion about the criteria for Attendance Allowance with Sarah, our advisor, who felt that Sheila did meet the criteria and she agreed for Sarah to come to her house and complete the necessary forms to apply.

During the visit, Sarah again brought up the possibility of completing a benefit check, as the client may be eligible for other support. A benefit check was completed, and this indicated that Sheila was also eligible for Pension Credit, Housing Benefit and Council Tax support.

### Case Study

Sarah completed all the forms on Sheila's behalf and Sheila is eligible for the following weekly benefits:

| Lower Rate Attendance Allowance | £ 60    |
|---------------------------------|---------|
| Housing Benefit                 | £ 73.97 |
| Council Tax Support             | £ 17.28 |
| Pension Credit                  | £ 70.37 |

# In total, Sheila now receives an additional **£221.62** per week

She is also entitled to a Warm Home Discount which provides £140 towards her energy bill. These additional benefits mean that Sheila's income has almost doubled.

### Case Study

Due to the support that the advisor provided, Sheila has been able to pay for a cleaner which has increased her independence, allowing her to remain comfortable and confident within her own home.

"Thank you for being so kind and patient with me"

"I cant believe the service I received from AgeUK HW is free"

"I had no idea I was entitled to extra benefits; these benefits will make my life easier, whilst maintaining my independence"

"I have told my friends about the Warm Homes Discount, and they did not know about it either"

<sup>\*</sup>Sheila not her real name

# Statement of Financial Activities (SOFA) for the year ended 31st March 2022

|                           | Restricted Funds<br>2022<br>£ | Unrestricted Funds<br>2022<br>£      | Total Funds<br>2022<br>£ | Total Funds<br>2021<br>£ |
|---------------------------|-------------------------------|--------------------------------------|--------------------------|--------------------------|
| Income From:              |                               |                                      |                          |                          |
| Donations and             |                               |                                      |                          |                          |
| Legacies                  | 10                            | 98,002                               | 98,012                   | 314,438                  |
| Charitable Activit        | ies <b>120,912</b>            | 1,210,159                            | 1,331,071                | 1,438,936                |
| <b>Trading Activities</b> | -                             | 2,460                                | 2,460                    | 6,747                    |
| Investment                | -                             | 54                                   | 54                       | 163                      |
| Other Income              | -                             | 16,739                               | 16,739                   | 15,332                   |
|                           |                               |                                      |                          |                          |
| Total Income              | 120,922                       | 1,327,414                            | 1,448,336                | 1,685,616                |
| Expenditure on:           |                               |                                      |                          |                          |
| Raising funds             | -                             | -                                    | -                        | 288                      |
| Charitable Activit        | ies <b>158,604</b>            | 1,314,932                            | 1,473,536                | 1,416,193                |
| Other expenditure         | e _                           | _                                    | -                        | 42,549                   |
| ·                         |                               |                                      |                          |                          |
| Total Expenditure         | <u>158,604</u>                | 1,314,932                            | 1,473,536                | 1,459,030                |
| Net (expenditure)         | \                             |                                      |                          |                          |
| Income                    | (37,682)                      | 12,482                               | (25,200)                 | 226,586                  |
| Transfer between          | ·                             | ·                                    | •                        | ·                        |
| funds                     | 32,937                        | (32,937)                             |                          |                          |
| Net movement              | 4,745                         | (32,937)<br>(20,455)                 | (25,200)                 | 226,586                  |
| 1400 1110 4 01110110      | T,/ TJ                        | (= <del>-</del> ,   <del>-</del>   - | <u> </u>                 | == -,                    |

# Statement of Financial Activities (SOFA) for the year ended 31st March 2022

| Re                           | estricted Funds<br>2022<br>£ | Unrestricted Funds<br>2022<br>£ | Total Funds<br>2022<br>£ | Total Funds<br>2021<br>£ |
|------------------------------|------------------------------|---------------------------------|--------------------------|--------------------------|
| Reconciliation of funds:     | 2                            | J                               | 2                        | 2                        |
| Total funds brought          | 49,995                       | 632,132                         | 98,012                   | 314,438                  |
| forward  Net movement in fur | nds <u>(4,745)</u>           | (20,455)                        | (25,200)                 | 226,586                  |
| Total funds carried forward  | 45,250                       | 611,657                         | 656,927                  | 682,127                  |



