

# ANNUAL IMPACT REPORT



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# 01 Reference and Administrative Information

Year ending 31st March 2023

## Trustees

Robert Rankin (Chair)  
Charlotte Wood (Vice Chair)  
Caroline Smith  
Peter Evans  
Michelle Worthing  
Brian O'Connell  
Iain Balchin  
Craig Guthrie  
Michael Newitt (resigned 26th September 2022)  
Mark Richardson (resigned 31st March 2023)  
Keith Trafford (resigned 31st March 2023)

## CEO

Julia Neal

## 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 Mailing.  
ME19 4JQ

HSBC,  
6 Board Street,  
Worcester.  
WR1 3LH

RBS,  
Drummonds House (CR) Branch,  
1 Redheughs Avenue,  
Edinburgh.  
EH12 9JN

## Charity Number

1080545

## Registered Number

03942023

## Address

Malvern Gate,  
Bromwich Road,  
Worcester.  
WR2 4BN

## Telephone

0800 008 6077

## Email

[referralhub@ageukhw.org.uk](mailto:referralhub@ageukhw.org.uk)

## Website

[www.ageukhw.org.uk](http://www.ageukhw.org.uk)



## 02 About Us – Who We Are

**For over 35 years we have been working to improve the lives of older people in Herefordshire and Worcestershire. Built on a strong ethos of volunteering and engagement with local communities, the Charity works with older people, their friends, families and carers to promote independence.**

We work with other statutory and voluntary sector organisations to identify the changing needs of older people. Our responses to those needs includes the professional delivery of person-centred services, activities and campaigns.

Supported by staff and volunteers, we are committed to enabling individuals as they age to maximise their independence and to be able to experience more fulfilling lives. We deliver a range of services in order to achieve our mission and fulfil our strategy. Over the next three years, we intend to develop our work in these services, allowing us to support more older people within Herefordshire and Worcestershire.





# A summary of our services:



## **We support older people to maintain their independence.**

We know that as people get older, many prefer to stay in their own homes and continue living within their community for as long as possible. For some, essential tasks can become more challenging and life at home can become less safe and manageable alone. Therefore, we provide a variety of services to help people stay independent in their own home. These include:

- Help at home
- Home from Hospital
- Handyperson Services
- Gardening
- Admin at Home Service
- Information and Advice Services
- Legal Surgeries
- Footcare and Podiatry Services



## **We promote opportunities for those who want to be physically and socially active.**

There is evidence to suggest that staying physically, cognitively and emotionally active is very important for older people and helps them remain independent and healthy for longer. Our services include opportunities to take part in a huge variety of activities including:

- Walking Sports
- Walking Friends
- Community Allotments
- Companion Line
- Armed Forces Veterans Telephone Befriending
- Reach Telephone Support for LGBTQ+ Community
- Gay Women's Group
- Computer Cafés
- Creative Arts Social Group



## **We support people living with dementia and their carers to lead more fulfilling lives.**

For people living with dementia and their loved ones, navigating the various challenges they face following diagnosis is often incredibly challenging. We offer a range of services which are designed to support people through their dementia journey including signposting to more specialist help, when that is needed. The services we deliver include:

- Dementia Meeting Centres
- Dementia Cafés
- Maintenance Cognitive Stimulation Therapy (MCST)
- Post Diagnostic Dementia Support Service
- Young Onset Dementia Service



## **We train those who support older people.**

We provide high quality, up-to-date training courses for a range of professionals, organisations, families and personal carers who are supporting older people.

Each course is developed and refined through the first-hand experiences of our trainers who work in those settings.

Our training is a crucial part of how we achieve our mission because it ensures that those working with older people develop the high standards that we promote.

We would also like to thank all those who have left us a gift in their will, raised money on our behalf or donated to our charity.

We are incredibly grateful for the legacies which are kindly given to support our work with older people in Herefordshire and Worcestershire. In 2022, we were humbled by the generosity and thoughtfulness of those who chose to support our work which resulted in our legacy income of £28,774.

We used this money to support our vital work of providing information and advice to older people, at a time when they most needed it and to support the delivery of our Veterans Meeting Centre in Hereford.



# Our partners

Most of our services are funded under contract or through grants from charitable trusts.

We continue to be very grateful for this support and would like to say a big 'thank you' to all those who have funded us during the last year and enabled us to make a difference to the lives of older people. These include:



Herefordshire and Worcestershire  
Health and Care  
NHS Trust





## 03 Our supporters and funders

### Partnership working is central to our mission of making a difference to older people across our two counties.

We work collaboratively with a range of partners to ensure that older people can access the help that they need. Together with our partners we deliver services and make and accept referrals for support.

We constantly seek to ensure that we develop and maintain strong and healthy partnerships and will particularly focus on this as we adopt our new strategy.

We maintain strong working relationships with all our partner organisations as we work together to share knowledge expertise and support older people in Herefordshire and Worcestershire.

What some of our partners have said about us:



#### **The Worcestershire VCSE Alliance**

“The Worcestershire VCSE Alliance collaborates closely with Age UKHW and has developed a valuable partnership over the past 12 months. Age UKHW plays a crucial role in representing charities that support older people within the Alliance forum and its extensive network of influence.

The Alliance regularly holds management and research group meetings at Malvern Gate. We are grateful for the warm welcome and use of the venue to bring together colleagues from across the county.

The Social Wellbeing and Inclusion Team have welcomed the Alliance Communications and Engagement officer to document the launch of its new Gardening Group in partnership with Worcester Community Garden, as an example of how the VCSE creates opportunities to enhance wellbeing and prevent ill health.”



## **Worcestershire Association of Carers**

“Worcestershire Association of Carers has been working with Age UK Herefordshire Worcestershire Training Solutions, delivering training for family carers, for more than a decade. We have consistently received positive feedback from clients about the quality of the facilitators and trainers and the benefits of the learning opportunities we deliver.

From Dementia Awareness, Moving & Handling, First Aid and Falls & Frailty to the newly launched De-escalation and Autism Awareness, courses are relevant, consistent and excellent in quality.

Worcestershire Carers is proud to be a longstanding delivery partner with AgeUKHW Training Solutions. “



## **Active Herefordshire and Worcestershire**

“Age UK H&W have become one of our key partner relationships within the Active Ageing programme across Herefordshire and Worcestershire.

From an initial Tackling Inequalities funding application, the relationships has blossomed into one where there is a mutual desire to work collaboratively on a range of projects. Together we are giving the ageing population of both counties, positive physical activities that not only improve their physical wellbeing, but also have a significant effect on mental wellbeing and the development of supportive social connections.

From Walking Friends to the variety of walking sports sessions, the work Age UK Herefordshire and Worcestershire continues to develop is an essential pillar in supporting our older adults to not only live longer, but more importantly to live better”

# 04 Message from the chair

**Robert Rankin**



## **Welcome to the Age UK Herefordshire and Worcestershire Report of Trustees and Annual Accounts for the year ending March 2023.**

This document provides details about how we have supported older people across our two counties during the last financial year.

The last 12 months have been dominated by societal challenges such as the increase in cost of living which particularly affected older people. This makes achieving our vision of making Herefordshire and Worcestershire a great place to grow older increasingly challenging. We are very fortunate to have such committed staff and volunteers who have again worked tirelessly to deliver an ever increasing range of services, designed to help older people live more independent and fulfilling lives.

This year the Trustees and Senior Leadership team have focused on developing a new strategy which will guide us through the next four years, ensuring that the Charity is sustainable and fit for purpose. Allowing us to provide for the growing demand on our services and the increasing pressures on our various funders.

Our Strategy consists of four key objectives, broken down into a number of areas of work which will underpin our business plan, provide the framework for our governance and guide our review of risk.

As Trustees we have a responsibility to regularly review and assess the risks faced by the Charity and this work was the foundation of our strategy formulation. We have reviewed how we manage risk in order to facilitate a more inclusive approach to identification, better communication and management and strengthening the controls we have in place to enable Risk Management to be effectively embedded.

To enable us to deliver on our strategy more effectively, we have reviewed our governance and reporting structures. This has enabled us to better differentiate between our strategic and operational work and provide more effective leadership. Our new committee structure is already facilitating better opportunities for Trustees to work with a variety of staff, developing trusted relationships which enable Constructive Challenge and facilitate organisational development.



The value of time spent reflecting on and improving our governance was evident as we approached our three yearly external quality review in order to achieve the Charity Quality Standard awarded by Age UK to Brand Partners who meet the requirements set out. We were delighted to pass with flying colours with no areas for improvement identified by the assessor; a significant achievement.

The review included interviewing a range of staff, volunteers and clients as well as desk-based research carried out over two days. The excellent result reflects the hard work and high standards of the whole organisation and the Trustee Board was delighted to receive such an endorsement of its governance and effectiveness.

We have, of course, been careful not to let this work distract us from our core mission of making a difference to the lives of older people across Herefordshire and Worcestershire, by providing connections, enabling seamless access to advice, support and services through awareness raising and advocacy; this report is testament to that.

The ongoing Cost of Living Crisis has really focused our activity and reminded us, should we ever need reminding, that our work is absolutely vital if we are to support the older people who need our help the most.



# Our Trustees

**This year we said goodbye to some longstanding Trustees and would like to thank them publicly for their hard work and service.**

Michael Newitt joined us in 2015, taking on the role of Vice Chair before becoming Chair in 2019 and supported the charity for seven years.

Mark Richardson was a valued Board member for eight years, providing expertise and promoting closer ties with our Brand Partners. We are delighted that he continues to volunteer, supporting our services and particularly the development of the Men Sheds project.

Keith Trafford was our longest serving Trustee; he dedicated his support for an impressive 17 years before retiring this year. Keith was a passionate supporter of the Age UK West Midlands Regional Network and took on the role of Treasurer on the Executive Board, as well as representing the West Midlands as Age England Association (AEA) rep during his time.





## Our trustee board for the year was as followed

Iain Balchin (appointed 9th May 2022)

Peter Evans

Craig Guthrie (appointed 9th May 2022)

Michael Newitt (resigned 26th September 2022)

Brian O'Connell

Robert Rankin

Mark Richardson (resigned 31st March 2023)

Caroline Smith

Keith Trafford (resigned 31st March 2023)

Charlotte Wood

Michelle Worthing

## What our Trustees say about their role with Age UK Herefordshire and Worcestershire



### **Charli Wood Trustee (from 2019) and current Vice Chair from 2022**

"I joined as a Trustee after my father died as I wanted to give something back to the community in which I grew up. I'm a Herefordshire girl born and bred, and giving some of my free time to help a charity that does so much for older people across the two counties is a real privilege."

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### **Iain Balchin, Trustee and Treasurer and Chair of Finance Information and Risk Subcommittee (from 2022)**

"Being a Trustee is hugely rewarding and I am very pleased to be able to support Age UK H&W as Trustee and Treasurer. Since I got involved just over 12 months ago I have seen great progress in the way finance is managed, both in terms of timely accounting and accurate forecasting, to support the Senior Leadership Team and Board in their decision making. The approach to risk assessment, mitigation and monitoring has also been improved and these changes mean that the charity is more efficient and better placed to support its mission effectively. The recent hiring of a new Finance and Information Director will only enhance these controls further."

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### **Michelle Worthing, Trustee and Chair of Standards and Services Subcommittee**

"I'm really looking forward to seeing the impact Age UK H&W makes over the next year, particularly after all the hard work undertaken by the leadership team, staff and volunteers. I'm especially excited about the fundraising events that have taken place, those planned for the future and hearing about how they have raised valuable funds to support the ongoing work of the charity, whilst helping to promote the services available. The expansion of services into Herefordshire is another area I am enthusiastic about - it's great that these will be available more widely across the two counties."



# 05 Message from the CEO

Julia Neal



**My first year as CEO has been somewhat of a roller coaster ride; it has been exciting, challenging, and fun in equal measures but has certainly stretched me beyond what I thought was my comfort zone.**

I am very grateful to Magda Praill for her time at the helm and to the Trustees for their support and patience as we grew to know each other and to Jude Henderson who has been an incredible support from the outset.

The dedication of our teams is humbling and range of services and projects they have developed to support older people to remain more independent is wide ranging and provides a very valuable resource within Herefordshire and Worcestershire, playing a vital part in keeping our older residents more connected, financially secure and physically active. Our people are our greatest asset; we are committed to supporting them on our journey with us and know that we have more to do to make this journey more fulfilling.

We have committed to invest in a new HR database which will support efficiencies in our processes. This will free up time for us to ensure that our staff and volunteers are fully equipped with all that they need to be able to support our clients effectively. We have also invested in new roles, including apprenticeships and interns to support our office functions and we have been very lucky to work with some highly talented young people in this way.

It has been inspiring to see how the charity has developed over the year, with an increased focus on working to the values we have developed together. We have re-energised and strengthened our vision and mission statements and developed a strategy and supporting business plan. This will help us grow and develop in a more structured way as we rise to the very significant challenges that face us as we respond to the issues that face our older population, particularly in relation to the cost-of-living crisis.

We have taken time to understand how we capture data and what we need to improve this. It will stand us in good stead for making sure that we are delivering our work where we can have most impact.

We are increasingly focused on partnership working to achieve the best possible results for as many older people as possible and this approach will become even more important as we adapt to meet the challenges associated with our work. We have been very proactive in supporting the development of the voluntary sector partnerships in our two counties, leading on a joint response to support winter pressures by helping those older people who are leaving hospital with no support.

I have been particularly impressed by the work we do to support people living with dementia and was delighted that we were able to implement the first Maintenance Cognitive Stimulation Therapy Course in Worcestershire, aiming to provide opportunities for those living with dementia to take part in meaningful and stimulating activities which have been proven to help maintain memory and mental functioning. There has been a fantastic response to the course, and we are looking to secure funding to set more up in the future given the increasing demand.

The need for our services continues to increase and we have invested in support for fundraising given that our income is currently reliant on the contracts that we hold and any grants we are successful in winning for specific projects. We have developed a fundraising plan and will next year start to set up fundraising events. We have also set up a hardship fund which is enabling us to support clients with specific financial needs to access our paid for services, if it will help them to be more independent.

2023 will bring more challenges but we will rise to them, as the needs of older people are central to what we do. An important part of our role as a Senior Leadership Team is to quantify those challenges and identify the risks, and potential risks, faced by the Charity and to ensure that we have appropriate mitigations in place.



**The most significant risks to the organisation, during this time, and the actions taken to address them are shown below:**

Risk/Potential risk	What we have done to reduce the risk / potential risk
The potential risk to our vulnerable clients if staff and volunteers do not adhere to the high standards of behaviour we expect.	We have developed organisational values which help us to articulate the behaviours we expect, and these have been embedded in our approach to recruitment and development. We have improved processes to ensure that we are compliant and introduced new ways to develop skills within our teams.
The potential risk that we will not have the capacity.	We are undertaking a review of all our services to ensure that they are run in the most cost-effective way possible. We have invested in the development of a volunteer model to maximise the use of our resources. A restructure of our teams has been carried out to ensure that we deploy staff's specialist knowledge more effectively.
The potential risk that the way that NHS and Local Authority commissioning is managed might impact on opportunities for contract funding.	We have continued to build on our excellent relationship with our funders and to ensure that we are able to demonstrate that our delivery is of a high standard and makes a positive difference to our clients. Our focus has also been on developing wider relationships both in the voluntary and statutory sector, to ensure that we are well placed to be part of the developing Integrated Care System. We need to further develop our relationships at a local level.
The risk that the nature of our Brand Partnership in relation to overlapping geography could limit our growth.	We are developing close working relationships with Brand Partners in Herefordshire and Worcestershire, within the wider West Midlands and in neighbouring counties. We will focus on maximising the potential for working more closely, building on areas of mutual interest.
The risk of limited income as a result of not having a dedicated fundraising resource.	We have invested in a Fundraising Lead and developed a plan which sets out how we are going to achieve the target we have set this year. We will build on this area of work by investing in grant writing expertise and further expanding the team to develop an income from charity shops.

Risk/Potential risk	What we have done to reduce the risk / potential risk
<p>The risk of the impact of increased costs on the Charity from inflation and cost of living rises, as well as increases to National Living Wage.</p>	<p>We have reviewed our business model with a particular focus on those services most impacted.</p> <p>We will also review our infrastructure costs including IT and premises to ensure that we are getting the best value for money.</p> <p>We will also improve our financial reforecasting and focus on scenario planning to ensure that we can make informed decisions about the best way forward.</p>
<p>The potential risk that we are not making the most of our client database to provide us with the information that we need to plan and manage our services effectively.</p>	<p>We have worked with an external consultant and expert volunteers to review the system and ensure that it aligns with the needs of our clients and services.</p> <p>We will continue to refine the structure of our database and to rationalise the data we are collecting in order that we can support our clients and demonstrate the impact of our work more effectively We will also continue to invest in staff training to improve the way in which we capture data .</p>
<p>The potential risk that we will not be able to work efficiently, due our staff and volunteers not having the knowledge and skills they need to be able to carry out their work.</p>	<p>We have reviewed the delivery of our core training for staff and volunteers.</p> <p>We have mapped the training that we offer to ensure that it complies with sector best practice and is compliant with relevant regulatory authorities.</p> <p>We will now focus on the more individualised requirements within different service areas as well as continuing to invest in development opportunities for all our staff and volunteers.</p>
<p>The potential risk to our reputation if we are not able to demonstrate that we are actively seeking to reduce our carbon footprint.</p>	<p>We have developed a Carbon reduction policy and procedures.</p> <p>We will be setting up a staff interest group to implement our plan to reduce our use of carbon.</p> <p>We will look at alternative premises.</p>



# Our People

We would like to thank all our staff for their hard work and commitment over the last 12 months

Alison Weaver	Human Resources Manager (left 29/07/22)	Denise Knight	Help at Home Assistant
Alison Webb	Help at Home Assistant (left 28/02/23)	Edward Smith	Help At Home Assistant
Alison Fletcher	Digital Inclusion Coordinator (left 28/02/23)	Elizabeth Loveday	Digital Inclusion Co-Ordinator (left 31/05/22)
Amanda Kitteringham	Meeting Centre Assistant (Vets & DSMC) /Help at Home Assistant	Emily Bowsher	Living Well Coordinator
Amanda Payne	Help at Home Assistant	Emma Almond	Finance Apprentice
Angela Ridge	Help at Home Assistant	Emma White	Home Support Assistant
Angela Taylor	Training Administrator	Emma Louise Jenkins	Dementia Wellbeing Support Advisor
Anita Tabbernor	Help at Home Assistant (left 25/05/22)	Etsuko Inufusa	Help at Home Assistant
Anita Mullin	Associate Trainer (left 28/02/23)	Fiona Osborne	Help at Home Assistant (left 28/12/22)
Anna Gwinnett	Living Well Co-ordinator	Gemma Warden	Living Well Team Leader (Vets) (left 31/05/22)
Anne Hawley	Help at Home Assistant	Georgia Crowe	Marketing Intern
Anne Montgomery	DSMC Team Leader	Geraldine Nind-Edwards	Help at Home Assistant (left 30/09/22)
Anne McNaughton	Associate Trainer	Gillian Hutchinson	Marketing Co-Ordinator (left 10/06/22)
Annette Bishop	Project Manager (left 15/02/23)	Gillian Tythacott	Service Manager (Herefordshire)
Anthony Barraclough	Handyperson & Warm Homes Advisor	Hannah Webb	Dementia Wellbeing Service Support Advisor (left 31/01/23)
Barbara Welch	Help at Home Assistant	Harriet Thomas	Help at Home Assistant
Ben Snookes	Help at Home	Heather Bullock	Home Support Team Leader
Carley Edge	Social Inclusion & Wellbeing Activities Coordinator	Heidi Arnold	Living Well Co-ordinator (left 23/12/22)
Carly Spence	Meeting Centre Support Manager	Helen Kelly	Office Manager and PA to the Chief Executive
Carole Blake	Help at Home Assistant (left 28/04/22)	Helen Bough	Help at Home Assistant
Caroline Anderson	Help at Home Assistant (left 30/09/22)	Helen Robertshaw	Help at Home Assistant
Caroline Savage	Social Inclusion and Wellbeing Manager	Helen Meadows	Help at Home Assistant (left 31/10/22)
Caroline Close	Help At Home	Helen Cook	Living Well Co-ordinator (left 28/02/23)
Cassie Stokes	Help at Home Assistant	Helen Hall	Digital Inclusion Co - Ordinator
Catherine Smith	Help at Home Assistant	Henrietta Scott	Help at Home Assistant
Catherine Mole	Dementia Support Assistant	Hilary Adams	Help at Home Assistant
Charlotte Kerr	Director of People and Organisational Development	Isobel Ellis	Dementia Activity Co - Ordinator
Charmaine Ince	Meeting Centre Assistant	Jacqueline Lamb	Help at Home Assistant (left 31/03/23)
Christine Jones	Help at Home Assistant	Jane O'Brien	Help at Home Assistant (left 30/06/22)
Christine Meredith	Catering Assistant	Jane Louch	Help at Home Assistant
Christine Clews	Help At Home Assistant (left 30/04/22)	Janet Burtenshaw	Help at Home Assistant
Christine Owens	Help at Home Assistant	Jared Shinnie	Team Leader and CRM Administrator
Christopher Ovenden	Help at Home Assistant	Jayne Flaxman	Help at Home Assistant
Christopher Richard Walker	Director of Finance	Jennifer Cox	Help at Home Assistant
Clare Crew	Dementia Support Assistant	Jill Gibbons	Help at Home Assistant
Colin Hanley	Training Manager	Joanne Calvert	Dementia Support Assistant (left 01/08/22)
Corinne Peart	Help at Home Assistant	Joanne Tatham	Dementia Services Team Leader
Danielle Harrison	Admin Support Advisor	Johanna Shearman	Finance & Information Manager
David Bunn	Help at Home Assistant (left 30/04/22)	Josephs Sharon	Help at Home (left 26/01/23)
David Noke	Handyperson & Warm Homes Advisor	Judith Henderson	Director of Services
Deborah Edmondson	Help at Home Assistant	Juila Neal	CEO
Debra Last	Meeting Centre Assistant	Julia Parr	Help at Home Assistant (left 11/11/22)
Deirdre Crammond	Relief Meeting Centre Assistant (left 28/02/23)	Julie Ludlam	Help at Home Assistant
		Julie Hill	Meeting Centre Assistant

Juliette Kay	Volunteer Coordinator	Penny Anne Jones	Meeting Centre Assistant (left 11/01/23)
Karen Gardiner	Help at Home Assistant	Philip Griffiths	Help at Home Assistant
Karen SeQueira	Living Well Coordinator (left 30/12/22)	Pushpa Parmar	Help at Home Assistant
Kate Waring	Help at Home Assistant	Rachael Ford	Home Support Manager
Kay Wall	Referral Hub Advisor	Rachel Blount	Help at Home Assistant
Kaye Bradley	Help at Home (left 30/11/22)	Rachel Harper	Associate Trainer
Kelly Reeves	Living Well Team Leader (Dementia)	Rebecca Bennett	Help at Home Assistant
Kim Shepherd	Meeting Centres Assistant (left 30/11/22)	Robert Crawford	Help at Home Assistant (left 28/02/23)
Kim Malynn	Living Well Coordinator (left 04/11/22)	Rosemary Wood-Jones	Help at Home Assistant
Laura Simnett	Companion Line Coordinator	Russell Payne	Help at Home Assistant
Laura Jones	Help At Home Assistant	Ruth Middlicott	Help at Home Assistant (left 28/02/23)
Lesley Fraser-Young	Associate Trainer	Ruth Nicholls	Meeting Centre Assistant
Linda Jelfs	Help at Home Assistant	Samantha Roberts	Referral Hub Advisor
Linda Crean	Help at Home Assistant	Samantha Saunders	Help At Home Assistant
Lisa Smith	Referral Hub Advisor	Sandra Harris	Help at Home Assistant (left 28/12/22)
Lisa Allsopp	Referral Hub Advisor (left 01/07/22)	Sandra Adams	Help At Home Assistant
Lorraine Reznik	Home Support Team Leader (left 08/07/22)	Sarah Evans-Young	Regional Administrator
Lorna Davis	Help at Home Assistant (left 31/08/22)	Sarah Turner	Information and Advice Manager
Lorna Davies	Podiatrist	Sarah Whitmore	Help At Home
Louisa Denyer	Podiatrist	Sarah Louise Clarke Smith	Help at Home Assistant (left 30/09/22)
Louise Jane Keys	Help at Home Assistant (left 30/09/22)	Selina Mead	Meeting Centre Assistant (left 13/10/22)
Lucy Caden-Robinson	Communications and Marketing Manager	Sharon Minchin	Help at Home Assistant
Lysa Southern	Help at Home Assistant	Sharon Davies	Help At Home Assistant
Maddison Roberts	Apprentice Business Administration	Shelley Chandler	Help at Home Supervisor
Mandy Benn	Referral Hub Advisor	Shirley Williams	Help at Home Assistant
Margaret Stoneham	People & OD Co-ordinator	Sian O'Brien	Home Support Co-Ordinator
Marianne Agolia	Quality and Project Officer	Simon Scarratt	Meeting Centre Assistant
Marianne N E Micoud Flewitt	HR Intern (left 16/09/22)	Sonya Murray	Information Advice and Guidance Service Manager
Mary Jane Bryant	Help at Home Assistant	Steven Kerrigan	Living Well Team Leader
Megan Symmonds	Apprentice Business Administration	Stojan Vasiljevic	Gardener
Melanie Bryan	Meeting Centre Assistant	Susan Murray	Home Support Team Leader
Michelle Balfry	Help at Home Assistant	Susan Caines	Help at Home Assistant (left 30/09/22)
Miriam Knight	Meeting Centres Assistant (left 31/12/22)	Susan Vyse	Help at Home Assistant
Molly Allsopp	IT & Premises Co-ordinator	Susan Pritchard	Associate Trainer
Monica Jones	Living Well Coordinator (left 30/12/22)	Teresa Isles	Finance Assistant
Naomi Jepson	Help at Home Assistant	Tracy Wilson	Help at Home Assistant (left 30/04/23)
Neil Miles	Marketing Intern	Vanessa Gannon	Help at Home Assistant
Nicola Lannie	Independence at Home Team Leader	Victoria Champs	Help at Home Assistant (left 30/10/22)
Pamela Graham	Living Well Co-Ordinator	Victoria Marsden	Help at Home Assistant
Pamela Wood	Associate Trainer	Victoria Frith	Help at Home Assistant
Pamela Ballone	Fundraising Lead	Victoria Johns	Home Support Supervisor (left 26/01/23)
Patricia Jones	Meeting Centre Assistant (left 31/03/23)	Victoria Johns	Help at Home Assistant (left 28/02/23)
Paul Edwards	Help at Home Assistant (left 30/09/22)	Victoria Tramontana	Dementia Activity Assistant
Paula Monk	Help at Home Assistant	Yasmin Banbury-Pugh	Referral Hub Advisor

## What our staff say about working for Age UK Herefordshire and Worcestershire:

*I have always wanted to work with the older generation to show that all ages can have a good impact on each other. I have learnt to be patient and understand that I may need to repeat myself with some clients, but they are happy when you start to understand.*

*As an apprentice, I feel that I have added a bubbly and amusing atmosphere to the office, particularly to the art club as I try to make even a rainy day enjoyable.*

### Megan Symmonds - Apprentice



*After working as a caretaker within a care home for the elderly, I realised that my DIY skills were sufficient enough to make a difference. So, when Age UK H&W posted the vacancy for a handyperson, I was excited to apply.*

*From installing grab rails following a hospital stay to replacing all the taps within the household to make them more user friendly, all jobs are rewarding as I feel that I have contributed to allow that individual to be safer and more comfortable within their own home.*

*Frequently I am greeted with the phrases like, “I wouldn’t know who to ask” or “my husband always used to do the DIY” and it is those comments that are often followed with praise for the handyperson service and that makes me feel proud to have played a part in it.*

### Dave Noke - Handyman



**A huge thank you to all of our volunteers that help us do what we do.  
Without them we simply could not have been there when it mattered.**

**We are incredibly lucky to benefit from their support, they make a huge difference in vital roles such as befriending, raising funds and supporting people to be more independent and safe when they leave hospital.**

William Adams	Computer Café Volunteer	Julia Downes	Walking Friends Volunteer
Marianne Agolia	IT Volunteer	Susan Draper	Dementia Café Volunteer
Diane Alldrett	Dementia Café Volunteer	Valerie Duffy-Cross	Companion Line Volunteer
Caroline Anderson	Companion Line Volunteer	Sally Duthie	Walking Friends Volunteer
Barbara Baker	Companion Line Volunteer	Stephen Earl	Companion Line Volunteer
Iain Balchin	Trustee	Stefan Edmead	Companion Line Volunteer
Nicholas Bancroft	Companion Line Volunteer	Lee Edwards	IT Volunteer
Lynda Banks	Companion Line Volunteer	Elizabeth Elliott	Companion Line Coordinator
Paul Barber	Companion Line and Walking Friends Volunteer	Peter Evans	Trustee
Margaret Barker	Dementia Café Volunteer	Jill Evans	Independence at Home Volunteer
Chris Barron	Digital Inclusion Volunteer	Vanessa Eversfield	Companion Line Volunteer
Richard Bateman	Home from Hospital volunteer	Helen Finlow	Dementia Café Volunteer
Olivia Benner	Companion Line Volunteer	Daisy Fisher	Walking Friends Volunteer
Andrea Bennison	Walking Friends Volunteer	Donna-Louise Flowers	Companion Line Volunteer
Geoffery Blyth	Computer Café Volunteer	Caroline Fortune	Walking Friends Volunteer
Jess Bolton	Companion Line Volunteer	Theresa Gavin	Companion Line Volunteer
Andy Bond	Walking Friends Volunteer	Alison Gayton	Dementia Café Volunteer
Nicola Bradbury	Independence at Home Volunteer	Robert Grace	Independence at Home Volunteer
Dorothy Brewer	Independence at Home Volunteer	Carol Gray	Home from Hospital volunteer
Louise Bugg	Computer Café Volunteer	Ranjit Grieve	Meeting Centre and companion line Volunteer
Gillian Burchell	Companion Line Volunteer	Christopher Griffiths	Digital Inclusion Volunteer
Helen Cameron	Companion Line Volunteer	Clara Griffiths	Home from Hospital volunteer
Kirsty Cartwright	Companion Line Volunteer	Craig Guthrie	Trustee
David Catchpole	Meeting Centre Volunteer	Jo Gwilliam	Walking Friends Volunteer
Christine Champness	Companion Line Volunteer	Carole Hague	Walking Friends Volunteer
Sarah Chan	Walking Friends Volunteer	Phyl Harradine	Companion Line Volunteer
Nigel Christie	Companion Line Volunteer	Ann Hartwright	Dementia Café Volunteer
Julie Clarke	Data volunteer	John Hawkins	Walking Friends Volunteer
Edward Clews	Dementia Café Volunteer	Marion Hearn	Dementia Café Volunteer
Sheila Cole	Walking Friends Volunteer	Sarah Heeney	Independence at Home Volunteer
Cheryl Compton	Companion Line Volunteer	Beverley Herring	Meeting Centre Volunteer
Marion Contreras	Companion Line Volunteer	Sallie Hewitt	Home from Hospital volunteer
Deirdre Cooper	Companion Line Volunteer	Leigh Heydenrych	Companion Line Volunteer
Heather Copus	Walking Friends Volunteer	Mark Higgs	Independence at Home and reception Volunteer
Judith Cosnett-Durn	Footcare Volunteer	Jordan Hollister	Proof Reading Volunteer
Rosemary Coupe	Dementia Café Volunteer	Ann Houghton	Companion Line Volunteer
Judy Crean	Dementia Café Volunteer	Debbie Howe	Independence at Home Volunteer
Annette Crouchman	Dementia Café Volunteer	Seren Hughes	Companion Line Volunteer
		Annette Hughes	Allotment Volunteer



Christine Curnow	Dementia Café Volunteer	Tracy Hulse	Walking Friends and companion line Volunteer
Anna Curtis	Companion Line Volunteer	Clare Hunter	Companion Line Volunteer
Shirley Dale	Dementia Café Volunteer	Adrian Hutt	Research Ready Volunteer
Thomas Day	Walking Friends Volunteer	Lesley James	Companion Line Volunteer
Michele Donaghy	Meeting Centre Volunteer	Susan James	Companion Line Volunteer
Carlton Douglas	Veteran telephoning volunteer		
Leah Jones	Companion Line Volunteer	Dorothy Roberts	Companion Line Volunteer
Michael Jordan	Admin Volunteer	Jill Robinson	Meeting Centre and companion line Volunteer
Emma Jukes	Admin Volunteer		Meeting Centre and independence at home Volunteer
Suzanne Kettle	Dementia Café Volunteer	William Robinson	
Margaret Kilcar	Digital Inclusion Volunteer		Companion Line Volunteer
Colin Kirk	Computer Café Volunteer	Levi Robinson	IT Volunteer
Andrew Lane	Digital Inclusion Volunteer	Bill Roddie	Walking Friends Volunteer
Robert Lane	Independence at Home and companion line Volunteer	Jeannette Roe	Computer Café Volunteer
Frank Lauriello	Walking Friends Volunteer	Justin Rowling	Companion Line Volunteer
Roger Lemmon	Dementia Café Volunteer	David Saunders	Companion Line Volunteer
Joanna Loader-Young	Walking Friends Volunteer	Jennifer Sayer	Proof Reading Volunteer
Elizabeth Loveday	Companion Line Volunteer	Melanie Scanlon	Meeting Centre Volunteer
Vicki Manley	Companion Line Volunteer	Lesley Scott	Digital Inclusion Volunteer
Maria Virginia Marcote Garcia	Companion Line Volunteer	David Sheppard	Companion Line Volunteer
Laura McGarrick	Proof Reading Volunteer	Eric Silverstone	Dementia Café Volunteer
Alison McGilvray	Companion Line Volunteer	Peggy Simms	Digital Inclusion Volunteer
Robert Meakin	Companion Line Volunteer	Alain Skelding	Companion Line Volunteer
Frank Mendez	Proof Reading Volunteer	Phillipa Smallwood	Trustee
Brian Miller-Hall	Digital Inclusion Volunteer	Caroline Smith	Companion Line Volunteer
Alyxandra Miller-Hall	Admin and companion line Volunteer	Verity Smith	Companion Line Volunteer
Simone Montgomery	Companion Line Volunteer	Rachel Smith	Companion Line Volunteer
Margaret Moore	Companion Line Volunteer	Philip Stanton	Companion Line Volunteer
Jackie Nash	Companion Line Volunteer	John Stiggers	Veteran telephoning volunteer
Sue Needham	Dementia Café Volunteer	Alan Tanner	
Karen Nicholls	Companion Line Volunteer	Louise Taylor	Companion Line Volunteer
Ruth Nicholls	Meeting Centre Volunteer	Emma Thomas	Companion Line Volunteer
Brian O'Connell	Trustee	Janette Thomas	Independence at Home Volunteer
Emma O'Monaigh	Companion Line Volunteer	Kerry Timbrell	Companion Line Volunteer
Val Pashley	Meeting Centre Volunteer	Joy Tomlinson	Companion Line Volunteer
Julie Perks	Companion Line Volunteer		Home from Hospital and companion line volunteer
Debbie Phillips	Footcare Volunteer	Barbara Tonkin	Walking Friends Volunteer
Graham Phipps	Companion Line Volunteer	Karen Vann-Hill	Art club lead volunteer
Patricia Podd	Veteran telephoning volunteer	Marianne Vincent	Admin Volunteer
Patricia Powell	Companion Line and Dementia Café Volunteer	Andrea Vose	Walking Group Volunteer
Philip Preston	Digital Inclusion Volunteer	Hilary Wainwright	Allotment Volunteer
Sian Pym McGran	Home from Hospital volunteer	Caroline Ward	Meeting Centre Volunteer
Bridget Quinn	Allotment Volunteer	Jennifer Ward-Robinson	Dementia Café Volunteer
Mysie Raine	Dementia Café Volunteer	Carol Warren	Meeting Centre Volunteer
Robert Rankin	Chair of the Board of Trustees	Dawn Webster	Dementia Café Volunteer
Bryan Ratcliff	Computer Café Volunteer	Kay Whaley	Dementia Café Volunteer
Natalie Rebeiz	Walking Friends Volunteer	Mark Whaley	Companion Line Volunteer
Sarah Rennie	Dementia Café Volunteer	Petra White	Companion Line Volunteer
Helen Richards	Companion Line Volunteer	Caroline Whittall	Companion Line Volunteer
David Richards	Digital Inclusion Volunteer	Chris Windsor	Companion Line Volunteer
Mark Richardson	Admin Volunteer	Jane Wise	Companion Line Volunteer
Christine Robbins	Companion Line Volunteer	Andrew Witney	Computer Café Volunteer
Deborah Roberson	Companion Line Volunteer		Vice Chair of the Board of Trustees and Companion Line Volunteer
		Charlotte Wood	
		Laura Wood	Companion Line Volunteer
		Rosemary Wooderson	Companion Line Volunteer
		Michelle Worthing	Trustee

## What our volunteers say about Age UK Herefordshire and Worcestershire:

*"I've always wanted to part of something that makes a positive difference to my local community, and so getting the opportunity to volunteer for Age UK Herefordshire and Worcestershire has been fantastic! The wonderful team have made me feel welcome, and the tasks I have undertaken have been varied and have helped me to develop my skills and confidence. Most importantly though, I have seen first-hand the real benefits that the services provide to the lives of older people in the area whether that be through activities tackling loneliness, giving practical advice on important issues such as energy costs and benefits, or providing a safe and engaging space for those living with dementia."*

**Leah Jones - Fundraising Volunteer**



*"I became a volunteer with Age UK some 15 years ago when I was made redundant from Jessop's camera group. I then took three-month computer classes where I updated my skills covering a lot of subjects including setting up email accounts, web design, and Microsoft Office, and much more. I share my skills with other tutors who in turn share theirs with clients who come to us with problems and sometimes new laptops, tablets, mobile phones etc. We are learning all the time from each other. Some of our beneficiaries have been coming for years as they enjoy the company of others and a lot of friendships have been made. I enjoy helping others and believe that the computer café is very beneficial to a lot of people."*

**Bill Adams - Computer Café Volunteer**



*"My mum was very ill, and Age UK were so helpful when we needed it the most. I decided to volunteer as it is a matter close to my heart and my way of giving back. I have been helping on reception twice a week and have supported older people coming out of hospital through the Home from Hospital service. I find it fun getting to talk to new people; some have been real characters, and it's nice hearing stories from their lives. I moved to Worcester recently, so it's also given me a chance to learn more about the area better. It's not until you do this that you realise how many people in the area need the help."*

**Mark Higgs - Reception and Independence at Home Volunteer**



# 06 Our Services

## Dementia Wellbeing Service

Our Dementia Wellbeing Service supports people to lead as full a life as possible for as long as possible. Our Dementia Wellbeing advisors are trained to listen, support and connect people living with dementia and their loved ones with local services and groups. A named worker will support clients to find the best support for them, from diagnosis up until the person requires personal care.

The support includes wellbeing checks tailored to the individual with the aim of helping people come to terms with their diagnosis and to adapt to change. This might include accessing additional funding to enable attendance at dementia specific groups or signposting to available technology that will enable them to remain at home independently for as long as possible.

### Case study

Mrs J called the DWS service as she was struggling to get her husband who was living with dementia to agree to accept any support. She was struggling to manage and would often ring us in distress to speak to her Dementia Wellbeing Advisor for reassurance and guidance. Following her husband experiencing a fall, and a period of respite care, Mrs J called us again as she was getting no sleep due to his need for round the clock care. She admitted that she needed the support but did not want her husband to go into full time care.

Our team made a home visit to support with Attendance allowance. They found that Mr and Mrs J were living in a few rooms of a large, cold house and were able to suggest alternative living arrangements that were more convenient. Having built a strong relationship with Mrs J, the Dementia wellbeing advisor was able to encourage Mrs J to move to a home with supported living which is more appropriate for their needs. Mrs J has fed back that she now feels more able to look to the future with a positive outlook.

## Dementia Cafés

Our 10 Dementia Cafés across Worcestershire run for two hours on a monthly basis and attendance is free of charge. The cafés provide a place for people to take part in enjoyable activities in a supportive environment. They provide support and advice for people living with mild to moderate dementia and their carers, friends and family and an opportunity to develop friendships with people who are also navigating through their dementia journey.

**Our Dementia Wellbeing advisors made 336 contacts to people living with dementia and their loved ones.**

**We have provided over 600 places for people to attend our Dementia Cafés.**

## Case study

Mrs L was referred to our Dementia Wellbeing Service because she was struggling with progressive aphasia due to her Alzheimer's diagnosis. She and her husband were looking for social groups to attend to compliment some of the other local activities that she was attending.

Our team recommended our Dementia Cafés and now Mr and Mrs L have developed a really good friendship group through attending our dementia café's and other activities. Mrs L is a very friendly, sociable person and is always smiling and happy to be at the cafés. She has also learnt some new skills and is always keen to try new activities, which has given her more confidence. Her husband has also commented that he can see the benefits of her attending.



## Dementia Meeting Centres

Our Meeting Centres are based in community buildings and offer on-going warm and friendly expert support to people with mild to moderate dementia and their families. At the heart of the Meeting Centre is a social hub where people meet to have fun, talk to others and receive help that focuses on what they need. Meeting Centres are based on sound research evidence of what helps people to cope well in adjusting to living with the symptoms and changes that dementia brings.

Every Meeting Centre is different determined by the needs and interests of the people using them, their families and their local communities. In response to the cost of living crisis, Age UK Herefordshire and Worcestershire offered attendance on the basis of asking members to pay only what they were able, to ensure that the support was available to all those who needed it.

### Case study

**We have provided over 1700 places at our Meeting Centres this year.**

Miss K attends our Hartlebury Meeting Centre every week and laterly decided to attend the Stourport Meeting Centre too. They provide her with a routine which she looked forward to. She enjoys the activities that run throughout the day and making friends with the other members and the staff.

She is very creative and particularly enjoyed the arts and crafts activities although did also push herself to join in with some of the seated exercise and dance sessions too. Her attendance gave Miss Ks family some respite and they appreciated the fact that their mum was in safe hands with the team. One of BK's sons commented,

*"I know that she has really enjoyed her time at both meeting centres and I can only praise all the various staff who have been absolutely brilliant with her and so kind. Once again, thank you and all the staff – I wouldn't have coped up until now without your support."*



## Maintenance Cognitive Stimulation Therapy (MCST) Courses

The courses provide opportunities for members take part in meaningful and stimulating activities, which have been proven to help maintain memory and mental functioning. The groups provide a fun, supportive environment where people can build new friendships. We carry out Mini Mental State Evaluations (MMSE) at the beginning and end of the course to evaluate the success of the course.

**The first cohort demonstrated improved MMSE scores in 80% of attendees with 7% remaining static and 13% declining.**

### Case study

Mrs W was referred to Age UK Herefordshire and Worcestershire by the NHS Early Identification and Diagnosis Team because they thought she would benefit from, joining our MCST course. She achieved a high score in her initial assessment, which improved to 30/30 after the 6-month MCST course. M's drive to remain active has helped slow her disease progression and the MCST course actually showed an improvement in her cognitive function at the end of the course.

Mrs W feels that her attendance of MCST and subsequent involvement with Age UK Herefordshire and Worcestershire makes her feel as if she is helping to break down the barriers people with dementia face. She also finds that keeping physically active and engaging her brain with these projects helps to slow the progression of her dementia. Mrs W has since volunteered to assisted the Dementia Team with planning Dementia Action Week 2023 and is an active member of the Worcestershire Dementia Partnership Meeting which our Dementia Service Manager chairs.



## Companion Line

Our volunteers make a weekly phone call for a friendly chat to clients who are lonely or isolated. They offer supportive and reliable friendships to people who would otherwise be socially isolated. This leads to improved mental health and increased confidence, as well as providing a pathway for clients to access other support.

### Case study

Mrs C is a 76-year-old lady, who had been accessing our other services, made contact after her husband died because she was finding it very hard to adjust to being on her own.

She did not want to speak to family about how she was feeling as they were also upset following her husband's death. Her health issues also meant that it was difficult for her to get out and about, so she felt isolated.

**We have provided over 3600 calls equating to around 1200 hours of conversation for lonely and isolated clients. During this period we provided services to 130 clients delivered by more than 45 volunteers.**

Whilst on the waiting list for a suitable match, Mrs C received telephone calls from our Companion Line volunteer group which meets every two weeks at Drybridge House in Hereford. The client really enjoyed the opportunity to talk, and conversations ranged from how much she was missing her husband to more light-hearted chat and laughter over the fact that she and the volunteer calling her supported rival football teams. She is now delighted to be matched with a permanent volunteer who will call her for a chat every week.

*"It's hard when you're not feeling well and you're on your own. Just being able to tell you I don't feel well today really helps. The volunteer made me laugh. It was so nice to have a laugh with her."*

The client feels less isolated now that she can talk freely about how she is feeling around the recent changes in her life and to chat, which she really enjoys and had been missing.





## Walking Sports



*"I wanted something to do, keep fit, meet new people as I am recently retired and wanted to get out. Walking basketball is really good fun and inclusive. When I started, I had not played basketball and no one seemed to mind."*

*"The exercise, keeps my weight down and I feel good the day after. I have made a couple of new friends too!"*

**Annual attendance  
of our walking  
sports sessions  
3383**

Our walking sports offer a more inclusive atmosphere that keeps people active whilst creating opportunities to be part of a group. We offer a range of walking sports across Worcestershire, which includes walking football, walking basketball, walking tennis, walking cricket and walking rugby. People that attend the walking sports have made great connections and keep in touch via our walking sports Facebook group.

## Lower Wick Walkers

Our Lower Wick walking Group is an NHS Health Walk, joined by Age UK Herefordshire & Worcestershire to help promote health and wellbeing. They walk at a steady pace for about an hour and the walks are therapeutic. There is also a social element as the walkers stay for refreshments at our Malvern Gate office after the walk. The group has 18 members.



*"We walk by the river and enjoy the wildlife, flowers and fauna. We once saw an otter in the river. It is a good opportunity to meet new people. It is a very enjoyable occasion with lots of talking and enjoying the people's company."*

## Computer Cafés and Digital Sessions

Our Computer Cafés and Digital Sessions are very popular and are a vital way of helping older people keep their independence through learning how to shop online, use online banking, navigate emails and keep connected with friends and family either in a group setting or on a one-to-one basis. The cafés are also a great place to socialise. Some people attend as a one off, to learn a specific skill, and others attend every week.

**229 people have  
been supported in  
285 sessions  
providing support  
of 1170 hours**

### Case study

Mrs C who had recently been bereaved and was struggling with managing the admin tasks her husband used to carry out. She received one-to-one support from a volunteer who showed her how to use the phone and guided her through buying a Chromebook. From being apprehensive about using a smart phone, she now has the confidence to use emails and WhatsApp and apply online for council services and her driving licence. Mrs C now joins the sessions as a volunteer to help support others.

*“The digital sessions have been my therapy, the support has been tremendous – I can sum up the service in one word – FANTASTIC.”*

## Pershore Allotments

Our Pershore allotments are a great way of encouraging people to get out and about and meet new people, make new friends, share and learn knowledge and skills about gardening and horticulture, and stay active.

Clients spend time growing their own fruit and vegetables either to take home or to be delivered to our head office; donations raised from this go back into the allotment to buy seeds and equipment.

*“I get great pleasure in groveling the dirt. My favourite past time is weeding. I like picking and harvesting the goods that have been grown.”*

*“The allotments are a green gym that helps me stay physical and active. It’s great to chat to people whilst working, in the fresh air. The growing is an extra bonus for me.”*





## Information Advice and Guidance (I&A)

Our Information Advice and Guidance Service is our core service and provides clients with help and support in every facet of later life, from finding out the benefits they are entitled to claim, to discussing options that help make later life at home more manageable.

**Our I&A service  
had 12,778  
contacts with our  
beneficiaries.**

### Case study

Mr X is a 72 year old widower living by himself in Worcester. He has no children and is reliant on his brother, who has health problems of his own, and his sister for help. He was struggling to live independently following two bad falls which resulted in multiple spinal fractures. Since his accident he had been living downstairs and experiencing challenges with all aspects of his personal care and is coping with serious mobility issues.

Mr X can no longer drive and is reliant on lifts. Increasingly, he was feeling isolated at home and that his independence was being taken away from him. He had been given an Attendance Allowance form but was struggling to complete it as he finds it hard to write for a long time.

**We supported  
people to apply  
for unclaimed  
benefits worth  
£1,600,417**

Our Information and Advice advisor visited Mr X at his house and filled in the Attendance Allowance form with him. She listened to Mr X describe the problems he was having and explained to him that an Occupational Therapy referral would help him get the adaptations needed and he agreed to this. She also helped him apply for a blue badge and guide him through the process of getting medical evidence for this, which he found difficult.

In the weeks after the Age UK Advisor's visit, Mr X has had contact with the Occupational Therapy Service and has heard that they will be able to adjust his home, including his bed and bathroom, which will make it easier for him to live in. He has now been awarded a Blue Badge and has more flexibility with getting around in the car. He has been awarded higher rate Attendance Allowance and hopes to spend some of this on employing a gardener so that his garden can once again become a pleasant place for him to spend time.

*"I always used to fix anything I needed in my house myself, and now that I am not able to, I didn't know what to do. I never realised that I could get help from the Occupational Therapy (OT) service until Age UK H&W mentioned it."*

## The Administration at Home Service

Our Administration at Home Service launched in October 2022 and supports clients to create an organised, easily accessible filing system within their home, setting up online banking, managing their paperwork, diaries, appointments and other administrative tasks. The support is intended to help people manage their own affairs more easily after the initial support.

### Case study

Mrs B is 81, lives alone and rarely sees her daughters. She suffers sight problems but has a busy lifestyle & many friends. She had a lot of paperwork that has accumulated over the years, including old bank statements, receipts, old bills, leaflets, and no space for it. She had struggled with making decisions about what she needed to keep & would talk herself into keeping things 'just in case they were needed.'

She contacted the service because she wanted to reduce the amount of paperwork she keeps and to have a filing system put in place so that she could easily find the documents that are important. Our adviser discussed the requirements for keeping old paperwork which helped Mrs B realise she did not need to keep everything. They then reviewed what she had and sorted it into what needed keeping and what could be disposed of or recycled.

Our advisor was also able to draft a letter for Mrs B to postpone the major home improvement works due to be carried out in her association owned home which was causing her additional stress as she recuperated from major surgery. They also helped Mrs B to renew her passport and apply online for a Global Health Insurance Card (GHIC) and to delete her unwanted emails on her iPad. She was registered with the telephone Preference Service to reduce the unwanted calls she was receiving.



## Older Veterans Service

Our Older Veterans Service supports veterans over 65 to access benefits and provides social activities, as well as putting them in touch with veterans associations and supporting them to access unclaimed medals.

**We have had contact with over 300 veterans during the year.**

### Case study

Mr A is an 88 year old RAF veteran who lives alone in Worcestershire. He is registered as partially blind and struggles with many aspects of his daily care. He relies heavily on his son who visits several times per week and prepares meals for him, as he can't read labels on food packaging. Although he can walk outdoors alone using his sticks, he needs supervision crossing roads. He was referred to us by the Sensory Impairment Team as he was struggling to maintain the housework and because he is quite isolated with the majority of his family living a significant distance away.

A member of the Age UK H & W Armed Forces Veterans & Carers service visited Bill at home address and completed an application for Attendance Allowance and referred to Blind Veterans UK, given that he had not engaged with them at that point. After speaking to him about his RAF service, they also established that Mr A served in the Suez Canal Zone but didn't have a medal and was also unaware of the HM Armed Forces Veteran's Badge.

They applied for both on his behalf – he was unable to complete forms due to his eyesight. As a result of our help, Bill was delighted to receive a General Service Medal (Canal Zone), and his HM Armed Forces Veteran's Badge. Bill was also awarded the higher rate of Attendance Allowance, giving him an extra £92.00 per week. He has also received visits from Blind Veterans UK, as a result of our referral.

*"To have the General Service Medal and Veteran's Badge is fantastic. It feels like recognition for the time I served in the RAF. The extra money I have from the Attendance Allowance is vital for me and allows me to pay for a cleaner who can keep my home tidy. It is great that I have had help from Blind Veterans, and I know that I can call them if I need anything else."*



*"Until I had the visit from Age UK Veterans Service, I never knew about any of these things. I never would have had my medal and badge, and I wouldn't have applied for the Attendance Allowance or asked for help with Blind Veterans. I know that I can call them for help, and I can't thank them enough. It's been marvellous what they have done for me."*

## Help at Home

Our Help at Home service offers clients regular, practical support with those tasks around the house that have become a little bit too much for them, including shopping, cleaning and tidying, changing the beds, laundry, hoovering and much more.

We provide regular, reliable, friendly support to help people remain independent for as long as possible. The service also provides company and companionship which can have a positive impact on loneliness and mental health.

### Case study

Pat, an 84-year-old woman living with dementia, faced a challenging situation when she needed assistance with cleaning her large bungalow. Her trust had been betrayed by a local cleaning company that took advantage of her vulnerability, resulting in missing items, including precious birthday money. This left Pat in a predicament where she still required support but was apprehensive about letting strangers into her home. Fortunately, her journey towards finding reliable assistance took a positive turn when she discovered Age UK Herefordshire and Worcestershire's Help at Home service.

Having worked as a nurse in a 61-bed ward, Pat remembered the invaluable support that Age UK could provide and the reputation of reliability they had earned over the years. This is where Pat was introduced to Sharon, a Help at Home Assistant from Age UK Herefordshire and Worcestershire. From that moment on, Pat's life took a positive and reassuring turn.

*"I love having her here. Sharon doesn't miss a trick, even things I wouldn't notice. She helps me with cleaning, emptying the bins, taking washing off the line, and she even helps me feed the cats."*

Sharon's commitment to Pat's well-being extended beyond her role as a Help at Home Assistant. Sharon has recently transitioned into a role as a Dementia Wellbeing Advisor for the charity and despite her new responsibilities, Sharon continues to support Pat once a week. A testament to the enduring connection they share. Pat expresses her gratitude, saying:

*"I am so glad that she has offered to carry on supporting me alongside her new job - I couldn't bear it otherwise. I have a nice bond with Sharon now; she is very easy to talk to, and I can trust her. She is very inviting, and my daughter is pleased with the support."*

Through the dedication and compassion of individuals like Sharon, Age UK Herefordshire and Worcestershire has not only rebuilt Pat's trust but has also enhanced her quality of life to ensure that she can remain independent in her own home.

### We have:

- **Supported 332 clients**
- **Completed 10,053 visits**
- **Gave 14,922 hours support**
- **Generated £299,017 income**





## Home from Hospital

Our Home from Hospital service is available to clients who are discharged following a stay in hospital. Our team of paid and voluntary assistants offer short-term support for adults (at no charge), to improve their independence, health and wellbeing at home, while reducing the need for non-medical health and care support.

Support can include being there to welcome the client home, linking with new and existing support networks, doing food shopping, light household tasks and assessing their needs to see if there is any other support we can offer. This service not only allows clients to remain independent in their own home for as long as possible, but it also supports the NHS by enabling people to be discharged safely, more quickly.

### Case study

Mrs H, a widow, was discharged from hospital after a fall with support from the District Nursing Team, but needed help with shopping and light housework whilst she regained mobility and confidence. Our Help at Home volunteer supported Mrs H for four weeks with shopping and cleaning and set up meal delivery services.

Mrs H felt the additional support from a volunteer had provided both practical support and companionship and asked to be referred to our long term help at home service. Our Advisors also helped her apply for Attendance Allowance which she hadn't realised she was entitled to; which will help to pay for the additional support she now needs.

### We have supported 891 beneficiaries with:

- **286 shopping visits**
- **112 setting up meal deliveries**
- **164 light cleaning visits to ensure their house was safe**
- **73 referrals into assisted technology**
- **33 referrals into WMFS for smoke detectors**
- **76 befriending visits**
- **49 referrals for aids and adaptations**

## Home Energy Checks

**In Worcestershire we have delivered 216 Home energy checks and 32 for our new service in Herefordshire.**

Our skilled and professional Handy-People provided practical advice and support to make homes more energy efficient for people over 50. This includes installing energy saving equipment to further reduce energy usage/costs such as draft excluders, reflective radiator panels, night lights, remote control switches. This is a free service that can reduce energy bills, save money and reduce stress and anxiety during the cost-of-living crisis.

*“Just a quick note to say how grateful my wife and I were for the home energy check undertaken here this morning. This is a really helpful service and was delivered brilliantly by Dave, who was highly professional, courteous and friendly throughout.*

*We appreciated all the advice given and the clear and focused way in which it was conveyed and we are hopeful that the reflective foils fitted behind a number of our radiators on outside walls will help reduce our gas consumption, which is our main concern. Our sincere thanks both to Age UK Herefordshire & Worcestershire and to Dave personally.”*

## Gardening

Our Gardening Service supports clients with a variety of jobs within the garden including: mowing the lawn, weeding, cleaning paths and patios, pruning & cutting back of hedges & small bushes, planting & maintenance of bulbs, plants & vegetables, painting garden sheds, fences, and garden furniture and general tidying.

For those clients who love their garden, it can have a huge impact when they are no longer able to do what they have always loved to do. It can improve their health and wellbeing as well as combat loneliness.



### We have:

- Supported 21 clients
- Completed 204 visits
- Completed 337.5 hours support
- Generated £6,581 income

## Case study

Our gardening service supports a 91-year-old lady from Droitwich who lives on her own and is still very independent. Although she has family nearby to help, she didn't want to burden them with odd jobs when they are busy.

We now cut the grass, weed the borders, cut back shrubs, maintain her pots and tidy the garage, whenever needed. Our service has allowed her to enjoy her garden without the stress and worry about it becoming unmanageable. The beneficiary also enjoys the social contact and spends time in the garden when the gardener is there.

Even during the winter she wanted Age UK to continue with her visits.

*“I will always find you things to do. I really appreciate every visit and value the service”.*

## Podiatry

Our Podiatrists treat a wealth of foot conditions ranging from ingrown toenails, corns, calluses, verrucas, fungal infections, biomechanical problems, to the complexities of the diabetic foot. They also provide advice on maintaining good health, especially to those with general medical problems.

This service gives the client peace of mind, that their feet are being treated by trained professionals which can improve clients mobility once their conditions have been treated.

### We have:

- **Delivered 954 appointments**
- **Supported over 200 clients**
- **Generated £29,412 in client fees and £43,769 funding**

*“We feel that the Podiatry service is excellent and invaluable. We love to be able to come together to have our treatment. We get lots of advice given and Louisa is very helpful and caring.”*

Mr and Mrs Jones

## Footcare



Our footcare service provides a simple toenail cutting service by a trained volunteer in a clinic environment, at a lower cost (to themselves) than a Podiatry appointment.

## Case study

Mr and Mrs Caldicott have been footcare clients since November 2014. They are husband and wife and love attending together. They were struggling to bed down and cut their own toenails and wanted to ensure they had regular visits to keep their feet healthy.

Our Podiatrist assessed their feet and assigned them to the footcare clinic with our volunteer, Judy and they have been attending every eight weeks since. Judy always makes them welcome and they love the cakes she makes.

### We have:

- **Generated £2,506 income**
- **Delivered 19 clinics**
- **Completed 166 appointments**

*“When leaving our appointment it is like walking on air, we love to come and have our feet done with Judy.”*

## Training

We deliver high-quality, cost-effective training to a range of health & care staff and carers within Health & Social Care settings. All our training is specifically tailored to support the needs of older people and promotes the delivery of a high standard of care and support.

Our trainers provide skills training, tailored to suit individual needs. We offer a range of courses which are accessible for learners at all levels, from First Aid and Manual Handling to more specialist areas such as Dementia and Mental Health First Aid.



**We delivered 207 courses from across our portfolio to 1769 delegates from across health and social care. This included 271 who attended Accredited First Aid Training with a 100% pass rate.**

Our Trainer's knowledge was rated as outstanding/very good by 100% of Delegates and 99% of delegates would recommend our Training to a colleague.

*"Very clear and informative."*

*"Engaging, friendly, informative."*

*"Relevant examples and discussions."*

*"Interactive and engaging training."*

*"The course was very enjoyable and Pam was very knowledgeable."*

*"Very clear information and helpful."*





# Our Impact

**13,673**

Total number of older people supported.

**5590**

Calls responded to with vital support and information.

**891**

People supported to live independently in their own home after a hospital stay or illness.

**7848**

Volunteer Hours

**260**

volunteer hours for our walking friends programme.

**14,922** hours of support delivered to

**322** clients

to help them live independently in their own homes.

**637**

Dementia Wellbeing Service referrals.

**304**

Dementia Meeting Centre Sessions.

**£13,069**

invested in the development of our people.

**316**

amount of Home Energy Checks to make best use of energy efficiencies.

**3600**

Calls to lonely and isolated people.

## Our latest client survey results showed that:

Respondents that found our services accessible: **84%**

Respondents that found our staff welcoming, listened to them and treated them with respect and dignity: **92%**

Respondents that felt we had a positive impact on their life: **92%**

Respondents that found our friendly: **95%**

## Our clients also provided the following survey feedback:

*"Changed my life as far as confidence in my feet and how they look and feel."*

*"The lady that sat with my mum each week was amazing; she was exceptionally kind and caring."*

*"Supportive knowledgeable and empathetic approach."*

*"Free prompt knowledgeable and went beyond the call-of-duty."*

## 07 Communication and Campaigns

We reviewed our resources during the year and appointed a Communications and Marketing Manager in November 2022, who continued the work of increasing our use of social media. Which we'd developed in the previous year with the aim of expanding our reach and encouraging more engagement.

We have seen some growth from 2022 to 2023, but with a fresh strategy in place, we hope to encourage more people to engage with our social channels in 2023 to 2024.

Channel	Following end of March 22	Following end of March 23
Facebook	882	1,200
Instagram	924	985
LinkedIn	217	413
Twitter	2200	2272

In 22-23, much of our marketing focused on print materials that directed prospective beneficiaries to the referral hub. We still also achieved an average of 2,915 website visitors. The 2023-24 Communications and Marketing Strategy aims to bring a wider audience of carers and loved ones to our website via a variety of channels.

### Events attended

We attended a variety of events during the year in order to: raise awareness of the services we provide, recruit new volunteers and develop our valuable networks with other organisations.

Events provide us with an opportunity to be more visible as an integral part of the communities we serve. We are very grateful to our staff and volunteers who supported us by attending the following events:



- Worcester Cathedral Christmas Tree Festival
- Worcester Show
- Worcester Pride
- St Peter's Summer Fair
- Evesham Living Well for a healthier memory and longer life
- Kidderminster Dementia Action Alliance Event
- Leominster Cost of Living Event

## 08 Trustees report



### Purpose

Our Charity's purpose (as set out in the object contained in the company's Memorandum of Association), is:

***To promote the relief of elderly people in any manner which now or hereafter may be deemed by law to be charitable, in and around the counties of Herefordshire & Worcestershire.***

### Objectives and principles

The charitable objects for which the organisation is established and to which it is specifically restricted are:

***To promote the relief of elderly people in any manner which now is or hereafter may be deemed by law to be charitable, within the counties of Herefordshire and Worcestershire.***

### Our Values

We are friendly

We work together

We make a  
difference

We are always  
learning

We are flexible

## Our strategic objectives set out how we will achieve our objects and principles.

### 01 Promote a positive attitude to ageing, leveraging the needs of older people, developing awareness of and building support for our work.

We do this by:

- Treat all adults fairly and with respect, promoting their different needs and opportunities to influence
- Build on our brand and develop our support, increasing the diversity of our income streams
- Increase awareness of opportunities available to older people and communicate the impact of our work
- Extend our reach to ensure that those whose need is greatest have access to our information and services

### 02 Ensure the highest standards of support and services which promote independence, tackle inequalities and address the needs of all older people.

We do this by:

- Provide information and support to older people, through cohesive and trusted service provision of a consistently high standard
- Developing new areas of activity to reflect best evidence and the needs of older people and to support growth.
- Support those working with older adults to develop high standards
- Develop and support partnerships to extend opportunities for service delivery.

### 03 Remain robust and adaptable as a sustainable organisation to deliver our Strategy and Business Plan.

We do this by:

- Develop effective systems and financial controls which support our work effectively and support our long-term growth
- Ensure our governance and data collection, collation and reporting is fit for purpose.
- Develop an infrastructure (including premises), reflecting the organisation's needs and supporting reduction in our carbon emissions.
- Ensure ICT resources and platforms enable staff and volunteers to work effectively, demonstrating activity and impact.

### 04 Develop and grow our people, ensuring that the charity is a great place to work and volunteer

We do this by:

- Provide fair and transparent recruitment, development and employment practices.
- Support the health and well-being of our people.
- Provide a culture of learning and development
- Communicating effectively, recognising the commitment of our people.



The trustees have given due regard to the Charity Commission's guidance on public benefit when planning the strategy and activities of the Charity. Our Business Plan sets out how we will achieve our objectives. The following is an overview of the activities undertaken during 2022 to achieve our objectives, focusing on our priorities as set out in last year's report.

## 1. We developed our services using a quality improvement approach based on feedback from our clients

Our approach included reviewing our compliments, complaints and feedback procedure and the implementation of a new Feedback Policy. We did this to ensure that our methods of gathering and responding to clients and stakeholders were robust and fit for purpose. The revised Feedback Policy means that we gather and act on feedback as a routine part of our work and this feedback is responded to promptly and used to inform our continuous service improvement work.



We now invite feedback from clients and stakeholders on both a formal and informal basis:

- **Informal methods** include the use of 'tell us what you think' cards which are left with customers at home visits, making service exit interview calls by reviewing the emails and letters received directly from beneficiaries. Compliments, comments and suggestions are presented to our Standards and Services Sub Committee. Action plans are created to support improvements or consideration of new services.
- **Formal feedback** is gathered via our annual client survey. A random sample of service users from the previous 12 months are selected and contacted to take part. We use questions which are devised to track progress on the improvements we have made and to highlight any gaps in provision.

During the year we implemented suggestions made by our clients during the annual survey conducted in the spring of 2022. These suggestions included offering alternative payment methods and reinstating a handyperson service and we were delighted to be able to implement both changes during the year. Clients are now able to make payment by card over the phone, in their own homes via our mobile card payment machines and by BACS. In the autumn of 2022, we welcomed three new team members to develop our Handyperson service across both Herefordshire and Worcestershire.

## **2. We refined our approach to financial management to ensure that our reporting is transparent and understood, to enable our teams to make full use of the information available to them.**



We have developed a monthly process to enable transparent and robust financial management. With the transition from Quicken to Sage we can benefit from improved access to financial reports which has resulted in staff having the ability to interrogate data relating to their budgets, which was lacking previously. Budget holders were fully involved in the setting of their individual service income and expenditure targets to ensure that their service development plans were included in anticipated costs.

Monthly management accounts are prepared by our Finance team and reviewed by the Senior Leadership Team before being disseminated to budget holders. Where necessary, budget holders liaise with the Finance Team to ensure areas of slippage are addressed quickly. Budget holders have been supported with training to better understand the management accounts, but this is still an area for development.

## **4. We developed the management team by ensuring that they have access to the skills and knowledge to lead our teams and develop ownership of improvements.**

Our annual appraisal process includes a Personal Development Plan for each employee highlighting any development needs required during the year to deliver their role effectively and support the charity to meet its strategic objectives. The need for leadership training had been identified by managers and a programme of bespoke Leadership and Management training and ongoing coaching was commissioned and evaluated well. We plan to run the course again in the future.



Members of our Senior Leadership Team attended the Quality Service Improvement and Redesign (QSIR) course which is an NHS project management programme specifically designed for those working within the healthcare sector and provides attendees with a range of tested tools and approaches to evaluate services and carry out improvements. We intend to continue to extend QSIR training within our management team into next year and to ensure that we make use of the tools within our daily operations.

## 4. We invested in time to develop partnerships with public bodies as the structure of the statutory sector continues to evolve.

During the year we joined the Worcestershire VCSE Alliance Forum as the representative for older peoples' charities. We also joined the Herefordshire VCSE Community Partnership and our Director of Services was part of two working groups which focused on how the sector can support people affected by poverty and reducing the impact of energy costs. We continued our membership of Healthwatch Worcestershire and Healthwatch Herefordshire, to ensure that older people have a voice in holding our statutory sector bodies to account.

We developed excellent relationships with the developing Integrated Care Board and built on our good relationships with our statutory partners including Worcestershire Acute Hospitals NHS Trust, Herefordshire and Worcestershire Health and Care Trust, Worcestershire County Council, Herefordshire County Council, Wychavon District Council and Wye Valley Trust.

Our CEO is one of two charity representatives on the Integrated Care Partnership Board and is the Worcestershire VCSE Alliance representative on the Worcestershire Clinical Forum. She is also a Trustee of KEMP Hospice in the Wyre Forest.



Our Director of Services and Home Support Service Manager sit on the Worcestershire Safeguarding Adults Group and our Director of Services is a member of the Dementia Programme in Herefordshire and Worcestershire. Our Dementia Services Manager was elected Chair of the Worcestershire Dementia Partnership meeting this year.

## 5. We developed services to deliver where they are most needed.

As the winter months approached, we quickly recognised that the cost-of-living crisis was having a significant impact on our clients' quality of life. Increasing energy prices meant that some older people in the two counties were having to make difficult decisions about heating their homes and cooking meals. In response to this we were able to offer our Warm Homes service to support clients to access benefits that they were previously unaware of, whilst also being offered advice to consider the energy efficiency of their homes.



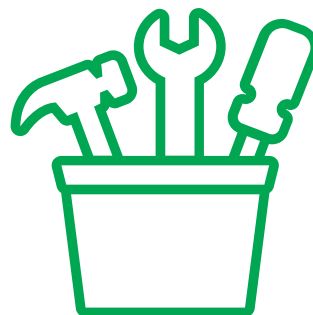
This year due to the launch of our Handyperson Service, we were able to complement the Warm Homes Benefit Entitlement service with our Home Energy Check offer and install energy saving measures such as lightbulbs, draft excluders and timer switches in to over 100 homes in the two counties. This service was delivered free of charge to the client.

## 6. We grew our paid for service provision.

In recognition of our reliance on contracts and grants income, it has been important for us to develop our fee-paying services which run alongside our funded provision. This income enables us to work with freedom to implement services that our clients tell us are needed but will not necessarily be commissioned by statutory services.

By diversifying our income streams in this way, we are building resilience as an organisation and mitigating the risk of contracts being lost or not retendered during the recommissioning cycle.

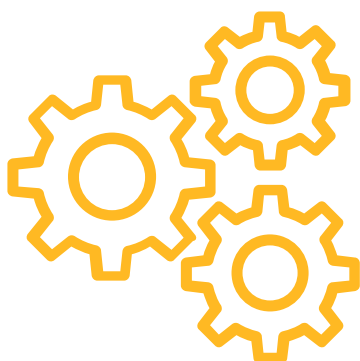
This year we have developed a Gardening, Handyperson and Admin at Home service all of which were set up in response to an increasing number of requests from older people and in time will provide an independent income stream.



## 7. We delivered new Maintenance Cognitive Stimulation Therapy (MCST) courses.

Feedback from our clients and colleagues working in the sector has suggested that there was a gap in the provision of a more structured approach to dementia support that we knew delivering MCST would fill. In January, we were fortunate to be successful in winning funding to pilot courses for two groups in Worcestershire.

MCST courses have been proven to halt the cognitive decline associated with dementia as well as providing opportunities for shared experiences and the development of friendships with people living in the similar circumstances. The funding award was well timed and enabled us to respond to the significant increase in dementia diagnosis rates following the easing of Covid-19 restrictions and people's desire to get back out and socialise following a long period of staying at home.



We are hoping to run more MCST courses in the future so that more people can access the benefit of this offer.



# 09 Governance and Finance

**Age UK Herefordshire & Worcestershire is registered with the Charity Commission as Charity Registration Number 1080545 and is a company limited by guarantee with Companies House registration number 03942023.**

The Charity is managed by the Board of Trustees which meets quarterly. The Articles provide for up to ten members, plus Honorary Officers. Honorary Officers are elected annually for a three year term. Trustees are also elected for three years, with eligibility for re-election for a further two periods.

Trustees have access to, and were offered, opportunities for training and development such as managing finances, legal requirements for running a charity, best practice on charity governance, GDPR, Safeguarding, Equality and Diversity.

The Trustees delegate the day to day running of The Charity to the CEO who is supported by the Senior Leadership Team.

Four subcommittees support and report into the Board:

## **1. Finance Information and Risk Subcommittee (FIRSC)**

The FIRSC has responsibility for monitoring the financial performance and security of the charity, reporting to the Board of Trustees and making recommendations on financial, budgetary and strategic matters. FIRSC met quarterly and received detailed finance information including Management Accounts, Cash Flow and Reforecast to provide assurance.

## **2. Engagement Subcommittee (ESC)**

The ESC has responsibility for promoting the value of older adults and extending our reach to ensure that those with greatest need have access to information and services. ESC met quarterly and discussed research projects, as well as reviewing the Fundraising Plan and Communications and Marketing Plan.

### 3. Standards and Services Subcommittee (SSSC)

The SSSC provides high level scrutiny, giving constructive advice and making decision that have a strategic impact on our standards and services. They support the development of partnerships to extend opportunities for service delivery. SSSC met quarterly to consider and develop service delivery, compliance, quality improvement and to provide assurance and make recommendations to the Board for consideration.

### 4. People Subcommittee (PSC)

The PSC ensure the values of The Charity are embedded and monitor our culture. They review legislation, and monitor its impact on the workforce . PSC met quarterly and received staffing updates, reviewed the staff survey and people policies.

The full Board of Trustees Meeting is held quarterly to review reports and recommendations from the subcommittees. The Board's agenda focuses on strategic issues and the Board held one Away Day focusing on the Charity's plans for growth. The Board also reviewed the risk analysis of the Charity's activities.

Subcommittees review their risks and FIRSC makes an initial overview and reports to the Board of Trustees. The trustees particularly focus on risks relating to the Charity's strategic direction.



# Financial Review

**£1,719,905**

**is what we spent on delivering our services  
and the support needed to do this.**

**£1,565,773**

**was our total income for the year including  
from grants, contracts and donations.**



**Age Concern Herefordshire and Worcestershire**  
**(A company Limited by guarantee)**

**Statement of financial activities (incorporating income and expenditure account) for the year ended 31 March 2023**

	Note	Restricted Funds 2023 £	Unrestricted funds 2023 £	Total funds 2023 £	As restated total funds 2022 £
<b>Income from:</b>					
Donations and legacies	3	-	178,206	178,206	98,012
Charitable activities	4	847,378	480,039	1,327,417	1,640,317
Trading activities	5	-	2,793	2,793	2,460
Investments	6	-	3,600	3,600	54
Other income	7	-	53,717	53,717	16,739
<b>Total income</b>		<b>847,378</b>	<b>718,355</b>	<b>1,565,733</b>	<b>1,757,582</b>
<b>Expenditure on:</b>					
Raising funds		-	80	80	-
Charitable activities	8	1,046,778	673,047	1,719,825	1,473,536
<b>Total expenditure</b>		<b>1,046,778</b>	<b>673,127</b>	<b>1,719,905</b>	<b>1,473,536</b>
<b>Net movement in funds</b>		<b>(199,400)</b>	<b>45,228</b>	<b>(154,172)</b>	<b>284,046</b>
<b>Reconciliation of funds:</b>					
Total funds brought forward as restated		385,328	580,845	966,173	682,127
Net movement in funds		(199,400)	45,228	(154,172)	284,046
<b>Total funds carried forward</b>		<b>185,928</b>	<b>626,073</b>	<b>812,001</b>	<b>966,173</b>

The Financial Statement of Activities includes all gains and losses recognised in the year.



# 10 Our future plans

**Our main priorities for next year are to refresh our Strategy and focus on the following key areas:**

- Grow alternative income from grants and events
- Scope opportunities for retail income and invest in resource to support development
- Develop new services based on client feedback including a Senior Women's Gay group and a Social Art Club
- Further develop our quality assurance processes for service delivery
- Manage the migration of our server based data to the cloud
- Develop our use of Teams and SharePoint
- Improve our financial forecasting
- Improve staff and volunteer experience of recruitment
- Develop our retention strategies including rewards and benefits
- Implement our HR system
- Review our financial policies



## Statement of Trustees responsibilities:

The Trustees (who are also the directors of the company for the purposes of company law), are responsible for preparing the Trustees' report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year. Under company law, the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the Charity and of its incoming resources and application of resources, including its income and expenditure, for that period. In preparing these financial statements, the Trustees are required to:

1. Select suitable accounting policies and then apply them consistently.
2. Observe the methods and principles of the Charities SORP (Statement of Recommended Practice) - FRS 102
3. Make judgements and accounting estimates that are reasonable and prudent.
4. State whether applicable UK Accounting Standards (FRS 102) have been followed, subject to any material departures disclosed and explained in the financial statements.
5. Prepare the financial statements on the going concern basis, unless it is inappropriate to presume that the charity will continue in business. The trustees (who are also the directors of the company for the purposes of company law), are responsible for preparing the Trustees' report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

In so far as the Trustees are aware:

- There is no relevant audit information of which the charitable company's auditors are unaware; and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information

The report of the Trustees, incorporating a strategic report, approved by order of the Board of Trustees, as the Company Directors, on 27th September 2023 and signed on the Board's behalf by:

Robert Rankin

Chair, Age UK Herefordshire and Worcestershire.



[ageukhw.org.uk](http://ageukhw.org.uk)



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