

Annual Report and Accounts

2019-20

Message from the Chair of Trustees - Pete Stubbs



I am delighted to welcome you to our Annual Report & Accounts, my first as Chair of Trustees at Age UK Mid Mersey.

Having been a member of the Board for some years, I am well aware of the challenges we have overcome to continue to deliver our much needed services to older people. This year has, in some ways, been no different. But, whilst the financial year we report on here ended in March 2020, it would be wrong not to make reference to the impact Covid-19 has had since the end of that period. Although our fundraising activities have, of course, been impacted by the pandemic, the much bigger concern is the increased demand on our services, both in volume and

complexity. Like all charities, we have been challenged and stretched but I have been incredibly proud and amazed at the outstanding resilience, dedication and effort of our staff and volunteers, my fellow Trustees and our Senior Management Team. The loyalty and support of our stakeholders and funders, as well as new relationships forged, have contributed immensely to our ability to reach the most vulnerable and isolated in our communities when they need us the most and, for that, we are very grateful.

I hope you will find this report provides a balanced view of Age UK Mid Mersey's performance in 2019/20, as well as celebrating our achievements and highlighting some remarkable projects and campaigns. The Respect Campaign #DoYouSeeMe? continues to build momentum, showcasing the contribution made by older people and capturing their wisdom and experience. While we do focus our efforts on the most vulnerable older people, we must not lose sight also of the many aged 55+ men and women who are keen to remain active, learn new skills and Love Later Life...we want to make sure we continually develop our services and activities to support this.

It is fair to say that the challenges of the last financial year were many and the Board and Senior Management Team have had difficult decisions to make but have been driven throughout by our charitable aims. As we say goodbye to our CEO Mark Lunney, I want to thank him on behalf of the Board of Trustees, for his hard work, leadership and commitment. We recognise that our long-term future depends on strong infrastructure, resources and personnel and I am confident that the Charity is in safe hands with our Acting CEO, Shelley Brown and her Senior Management Team.

Peter Stustoto

Message from the Chief Executive Officer - Mark Lunney, CMgr

It never ceases to amaze me just what a huge impact we have locally.

Year on year consistently delivering desperately important information and advice on a vast range of older people's issues, handling over 4,000 enquiries. Our welfare and benefits checks identifying more than £1.3million of additional income for clients and our work on tackling winter pressures, are just some examples of why we are respected, why we are Age UK.

At the last AGM, we launched our #DoYouSeeMe? campaign and this started a journey for us that lifted our campaigning reach beyond anything we have done before. It tackled loneliness and isolation in such a powerful way!



All of our work reaches into the heart of the communities we support and the Covid-19 pandemic highlighted this so well. Whilst this report covers the period leading up to the start of the pandemic, you can see a little of the impact we were already having later in this report.

Looking forward, we are delighted to be welcoming a new CEO in the months ahead as I move to another new role. We have a new wellbeing model for ageing well and we are excited about the future challenges faced in our sector alongside innovation and technology, learning and new partnerships.

Age UK Mid Mersey is a fantastic charity that makes a significant difference to our communities across the region and it is the amazing support that we get from all of you in that community, that makes it so worthwhile. 2021 and beyond will, I am sure, prove equally exciting and successful.

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Our Services...this year's headlines

We are committed to working locally to help everyone love later life...

Information and Advice

- 2,759 people supported by our I & A team
- **£1.3million** additional benefits claimed with our help
- 4,000 enquiries handled by our team
- **1,100** information packs distributed

Campaigning for Older People



Our campaigning on behalf of older people has continued this year, keeping up the pressure on the Government over their plans for scrapping free TV licences for over 75s and calling for improved funding of social care.

In addition, our #DoYouSeeMe? campaign is challenging attitudes towards older people and ageing and volunteer Gwen contributed to a national TV ad campaign tackling loneliness (more on these campaigns later in the report).

Keeping Warm and Well in Winter

In collaboration with St Helens Council's Winter Warmer Campaign, **4,500** packs were distributed to those most vulnerable older people in or at risk of fuel poverty, allowing us a first point of contact to many new clients.

Maintaining Independence

We helped more than **350** local older people to remain independent and reduced social isolation through our Befriending service, offering face to face support, helping hands service, positive living day care, social inclusion groups, community hubs and our help at home service. Find out more about our work to support independence later in the report.



Health and Wellbeing

450 people were supported through our Active Ageing classes, including Tai Chi, Line Dancing and Nordic Walking.

E.O.N Warm Homes Programme

More than **420** people were supported to maximise their benefits and stay safe and warm during the winter through the **E.O.N Warm Homes Programme**.

Age Concern Mid Mersey Summarised Consolidated Statement of Financial Statements For the Year Ended 31 March 2020

	2020 Total	2019 Total
-	£	£
Income:	10.100	40.000
Donations and Legacies	19,100	19,826
Other Trading Activities	213,649	219,668
Income from Investments	6,482	4,967
Income from Charitable Activities	461,386	508,951
Other Income	11,240	5,756
Total Income	711,857	759,168
Expenditure:		
Raising Funds	169,687	189,870
Charitable Activities	657,617	700,973
Total Expenditure	827,304	890,843
Profit on sale of fixed assets	49,151	-
Gift Aid donation from Associate	32,647	56,341
Impairment of fixed assets (revaluation)*	(866,157)	-
Net expenditure for the year	(899,806)	(75,334)
Reconciliation of funds:		
Total funds brought forward 1st April 2019	2,729,750	2,805,084
Total funds carried forward 31 March 2020	1,829,944	2,729,750
Extract from Balance Sheet:		
Fixed Assets	1,297,542	2,209,644
Current Assets	738,127	712,526
Current Liabilities	(205,725)	(192,420)
Total Net Assets	1,829,944	2,729,750
Funds:	40.000	21412
Restricted Funds	18,664	24,140
Unrestricted Funds held in Fixed Assets	1,282,957	2,193,842
Unrestricted General Funds	528,293	511,751
Non Charitable Trading Funds	30	17
* exceptional item	1,829,944	2,729,750

Reserve levels represent 9 months operating expenditure.

The above extracts are taken from the Statement of Financial Activities and Consolidated Balance Sheet contained within consolidated accounts for the year ended 31st March 2020 which were approved on 28th July 2020. The full audited statutory accounts have been submitted to the Charity Commission and a copy can be obtained from the Charity Commission's website.

Financial Review - Income and Expenditure Highlights

Where our funds came from in 2019/20...

Our net incoming resources were **£744 thousand** including the profit share from our Associate Company



The above extracts are taken from the Statement of Financial Activities and Consolidated Balance Sheet contained within consolidated accounts for the year ended 31st March 2020 which were approved on 28th July 2020. The full audited statutory accounts have been submitted to the Charity Commission and a copy can be obtained from the Charity Commission's website.

Age UK Mid Mersey in St Helens and Knowsley

Some of the highlights from our work in St Helens and Knowsley...

St Helens

- Positive Living Day Care Service we held **2,338** sessions accessed by **73** people.
- Befriending **204** active referrals and **57** active volunteers
- **4,500** Winter Warmer packs were distributed to those at risk of fuel poverty. They included gloves, tissues, tea bags, torches, lip balm, calendar and relevant information on how to stay safe and warm throughout the winter months.
- In collaboration with St Helens Council, Age UK Mid Mersey led the project with a launch event at St Helens Town Hall and support from local libraries and De La Salle High School.



Positive Living Day Care

Thanks to our collaboration with St Mark's Nursery in St Helens, our service users have regular visits from the children.

Everyone thoroughly enjoys these days of fun and they often do crafts together.



Knowsley

- Age UK Mid Mersey held **90** participation group sessions at Roby Community Hub
- Roby Community Hub was the venue for more than **180** community group activities
- Age UK Mid Mersey have active involvement with Knowsley Older People's Voice in partnership with Healthwatch Knowsley
- We are a proactive member of Knowsley Dementia Strategy Group.



Roby Community Hub Action Days

A huge thank you to the amazing businesses who supported our community action days throughout the year.

Working with Swanside and Roby Councillors and One Knowsley they tidied the garden areas, painted fences and pruned trees.

Age UK Mid Mersey in Halton and Warrington

Some of the highlights from our work in Halton and Warrington...

Halton

Halton Older People Engagement

- Through our 'Engagement Plus' initiative, we regularly consult with our Information and Advice clients to gain a wider view of issues
- Loneliness and Isolation case studies
- Respect and Dignity Organisational Self-assessment rolled out to partner organisations
- Safeguarding Case Study and City Region Age Friendly Forum held at Age UK Mid Mersey Headquarters
- Telephone survey that was conducted produced a referral mechanism to falls prevention (part of Halton Public Health service provision)

Halton Expert Panel

Our Expert Panel was established to enable us to actively engage with a representative body of older people and this year we held three Expert Panel Engagement Workshops. They focussed on Respect for Older People, Information Provision and Dementia Friends. Reports from one of these workshops was directly inserted into local authority strategy.

Campaigns

#DoYouSeeMe?

In collaboration with Halton Borough Council and Cronton College, the campaign has continued with events held at Widnes and Runcorn Libraries and with Plus Dane Housing. (See over the page for full article).



Warrington

Reaching out to Older People in Warrington

With a place on the Warrington Older People's Partnership Board, and as a friend of the voluntary group, Warrington Older People's Forum, Age UK Mid Mersey are pleased to have the opportunity to hear the views of older people in Warrington, offer support and contribute to their wellbeing.

Warrington Tea Dance

The popular tea dances held every Monday at the Pyramid are run by a dedicated team of Age UK Mid Mersey volunteers. Attended by 75 older people across the year, the events provide an opportunity to meet new friends, stay active and dance in a relaxed and welcoming atmosphere.

Respect Campaign

#DoYouSeeMe?

At last year's AGM, we launched our #DoYouSeeMe? Campaign aimed at challenging cultural attitudes towards ageing and older people.

The focus was changing perceptions, respecting older people and celebrating their lifetime of experience, their wisdom and everything that an older person has to offer society.



#DoYouSeeMe?

The campaign idea was based on some internet photographs showing a range of older people looking into a mirror with a younger version of themselves reflected back. Halton Borough Council invited Age UK Mid Mersey to translate these photos into a meaningful campaign around 'respect' for older people.



So, in collaboration with students and staff at Cronton College, five friends of Age UK Mid Mersey, including Older People's Panel members and several of our Trustees, were selected as case studies to produce the thought-provoking range of inter-generational #DoYouSeeMe? visual media.

With a range of ages and backgrounds, each candidate has their own story to tell about their past experiences, what they do now, how they value themselves as older people and how they view respect. Their images and experiences tell a powerful story.

Since its launch, the campaign message has been promoted across our areas of reach and beyond. Promotional posters, photobook and postcards were shared electronically across all partners and organisations in Halton and the Mid Mersey region. Included in this distribution was a campaign summary with guidance on how to use and share the campaign.

Local MP ,Mr Derek Twigg opened the #DoYouSeeMe exhibition at Kingsway Library, which proved popular with visitors. The exhibition was used as a call to action for college students to go into care homes and provide beauty therapy for older people. These exhibitions, a joint venture with Halton Health Promotion under their #HaltOnLoneliness campaign, will move to other venues in the borough, continuing the impact of #DoYouSeeMe?

#DoYouSeeMe?

Respect Campaign

As part of the awareness raising for the campaign, two of our models, Doris and Steve, spoke live on BBC Radio Merseyside about what this campaign means to them.

Their contribution to the campaign posters and accompanying photobook included quotes about how they feel as older people. Steve, who's poster describes him, amongst other things, as a campaigner, paramedic, author and educator, summed up the ethos of the campaign, saying:



Mother, grandmother, dancer and brown owl, Doris, said:

"When my husband died nine years ago, I thought I'd never feel happy again until I started dancing...I feel fabulous, everyone should try it!" "Just because I am an older person, does not mean that I don't make a valuable contribution, because I do!"



Age UK Mid Mersey have long understood the importance of listening to older people and we encourage them to help shape our services through the Older People's Expert Panel. The forum has been developed to be a safe space for older people to share their views and to feel comfortable in joining discussions.

Through the #DoYouSeeMe? message, we hope to ensure that older people are recognised as more than a list of health issues and the number of birthdays a person has celebrated...



we are not denying age – we are celebrating it!

Age UK Mid Mersey Project Lead: Clare Lightfoot

Breaking Down Barriers to Independence

Age UK Mid Mersey works hard to help older people remain independent in their own homes, providing assistance with access to support that they would not otherwise know about. Helping them to access these services is often not straightforward and our team have done some amazing work in the past year to help breakdown barriers to access. One example of this is our Pathways to Aids and Adaptations project...

Every week, our Information and Advice team receives multiple calls from older people seeking support to access the aids and adaptations they need to continue living safely and independently within their own home. Obtaining this support is a complicated and lengthy process, with some older people waiting up to three months for assessments for aids and adaptations. With our experience and knowledge, we are able to help guide them through the minefield of applying for assistance.

So, to highlight the complexity of the process, we used our experiences to create visual pathways showing the different routes that might be taken to access aids and adaptations. Focusing on Halton as a pilot, we mapped out the three main routes: rent or buy privately, self-refer to health and social care services and access services via a GP referral.



If you would like to find out more about this project, please contact our Head of Services (Quality and Development) at: enquiries@aukmm.org.uk.

Tackling Loneliness and Isolation

Alongside supporting older people to maintain independence, our work to tackle isolation and loneliness is vital. Some of the feedback we received this year demonstrates how valued our services are and the difference they make to older people in St Helens and beyond.

Positive Living Day Care in St Helens

When Ada's family suggested she attend our Positive Living Day Care in 2014, she was a little reluctant at first. Now, at 99 years of age, she attends sessions twice a week, participating in chair based exercise, dominos, bingo and quizzes. She loves meeting up with her new friends, volunteers and staff. Even after a spell of illness in 2019, Ada was determined to get out and back to seeing her friends at the Mansion House. Ada said:

I love coming to Positive Living... it stops me from being lazy!



Befriending Service

Being matched with a volunteer befriender often fills a big gap in an older person's life. By receiving a visit or phone call each week, lonely and often housebound older people have the opportunity for a friendly chat and a listening ear, breaking up the day and making them feel less isolated. The service also allows us to identify any concerns and make service users aware of other support available to them.

The feedback we receive from St Helens residents says it all:



Playing our Part in Social Prescribing

Thanks to a longstanding collaboration between Age UK Mid Mersey's Information and Advice Team and a local GP practice, older people in Widnes have been able to access the Charity's services while visiting their own surgery.

Engaging closely with the Practice Manager and staff at Bevan Group Practice, our Wellbeing Officer (Advice) visited the Beaconsfield Surgery every fortnight offering patients help with everything from Attendance Allowance claims and benefit checks, to advice on energy bills and warm home discount. They often supported with arranging assessment appointments for aids and adaptations and even chasing up hospital referrals.

Building strong links at the surgery over the past seven years, Age UK Mid Mersey's presence has given their GPs



and Practice Nurses the chance to refer patients directly to our Wellbeing Officer on site, as and when they identified a patient in need of support.

The project was so well received, that, in 2019 Age UK Mid Mersey was asked, through the Halton GP Practice Managers Meeting, to pilot a roll out to all other GP practices in Widnes. The roll out was welcomed by other Practice Managers and, by March 2020, we had linked with all eight surgeries in Widnes to offer their patients referrals, by appointment, to an Age UK Mid Mersey Wellbeing Officer (Advice).



Whilst the onset of the Coronavirus lockdown saw the in-surgery service put on hold, referrals can still be made for telephone appointments to ensure that older people continue to have access to the support they need.

You don't have to be referred by your GP to our services, if you need information, advice or support, phone 0300 003 1992.

If you would like to find out more about this project, please contact our Head of Service (Quality and Development) at: enquiries@aukmm.org.uk.

Age UK Mid Mersey Project Lead: Aruna Sethi

Maintaining Independence at Home

Age UK Mid Mersey is committed to supporting older people to maintain their independence. We understand the importance of helping them to stay in their own homes and keep as much control as possible over their later life choices.

Many of our services are designed with this in mind, from offering information and advice on claiming benefits and helping with energy efficiency, to offering opportunities for social interaction. The impact of our work can often mean our service users being able to remain independent and in their own home for much longer.

A great example of the practical support we offer at home is our Helping Hands service. We receive no external funding for the service but, with the help of volunteers, we are able to continue to provide this much needed practical help, in return for a small affordable donation where possible. This year, 164 clients in St Helens benefitted from the service...



Those little odd jobs around the house can often cause untold frustration, especially for an older person who perhaps doesn't have the mobility they once had.

No one should have no one to turn to so, when that light bulb needs changing, new curtains need hanging or the freezer needs defrosting, we enlist one of our amazing Helping Hands volunteers to offer reliable, practical and reassuring support.

The Helping Hands service relies entirely on charitable donations, but such is the demand that we are hoping to expand the offer across our other areas of reach.

Can you help? To find out more, donate or offer your services, please contact us at: enquiries@aukmm.org.uk.

One happy customer said:

Paul, the volunteer from Age UK Mid Mersey, is great. I trust him to support with the little jobs I can't get to. He's done a few jobs for me this year helping to put up shelves, pictures and my curtain pole. Thanks Age UK Mid Mersey - A great service I can always rely on.

Mrs R



Can you help support our work?...

If you have been inspired by what we do, there are a number of ways you can support Age UK Mid Mersey...

Become a volunteer

Volunteers help us deliver vital services to local older people. Roles include helping with our social inclusion activities such as Positive Living Day Care and befriending, providing reception, admin or digital support, offering odd job support for our Helping Hands service and helping with fundraising events like our craft fairs and beer festival.



Volunteering for Age UK Mid Mersey can bring its

own rewards too. Take a look at Gwen's story over the page to see the impact that volunteering for the Charity has had, not just on those she helps, but on her own wellbeing too.

We're always looking for committed people who can spare a few hours each week to support our work, especially if you have skills and experience to share.

If you are keen to get involved, email: enquiries@aukmm.org.uk

Trustee Volunteers

Want to make a difference to local older people and help shape the future of our Charity?

We are looking for dedicated people who can volunteer their energy, time and skills to become Trustee Board members.

Empathy towards the challenges of ageing would be an advantage, but not essential...passion and commitment are far more attractive to us. We are looking for skilled people of any age with a range of professional and life experience.

This is an opportunity to oversee governance and provide strategic leadership to the organisation at an exciting time of change and growth.

You will need to commit to attend bi-monthly Board meetings and sub-committee meetings, as well as contributing to projects and events throughout the year.

For further information about the role of a Trustee at Age UK Mid Mersey, or to request an application pack, email: enquiries@aukmm.org.uk

We are proud of our work and who we are...

Age UK Mid Mersey was re-assessed for the <u>Age UK Charity</u> <u>Quality Standard (CQS)</u> by external quality assessment experts, SGS, and we are delighted to have excelled in the required standards.



Can you help support our work?...

Help us with fundraising

We need to raise £1million every year to continue providing our vital services to older people in St Helens, Halton, Knowsley and Warrington and we're hugely grateful to all of those who fundraise for our cause.

People such as our service users, Ken and Dennis who raised money by organising a series of Country and Western Nights! Or our friend Jayne Leponis, who ran the London Marathon to raise funds to say thank you for helping her and her father.

If you have a fundraising idea and would like to help us continue our work to support local older people, we would love to hear from you.

> Fundraisers Ken Donaldson, Dennis Clarke and Terry Smith



Make a donation or leave a legacy in your will

We rely on your support to keep helping older people in Halton, Knowsley, Warrington and St Helens. Any donation, no matter how small, is greatly appreciated. If you wish to leave a gift to Age UK Mid Mersey in your will, all you need is our charity details below:

Age UK Mid Mersey, The Mansion House, Victoria Park, City Road, St Helens, WA10 2UE and our **registered charity number 1003476.**

Visit our website to find out more: www.ageuk.org.uk/midmersey/get-involved/leave-a-legacy

Get your organisation involved

There are plenty of ways your organisation can support the Charity. Whether its organising your own fundraising event, booking one of our meeting rooms or encouraging your staff to



volunteer as a team as part of your Corporate Responsibility Programme.

That's exactly what Zurich Engineering did. Rallying a group of their staff, they spent a full day clearing and tidying our kitchen gardens ready for hiring out as allotments.

If you are interested in offering the support of your organisation, or would like to find out more, email:

enquiries@aukmm.org.uk

Celebrating Halton Heroes

Pass it On Awards 2019

Working with Halton Borough Council, Halton Safeguarding Children Board, the Faith Forum and Cheshire Constabulary, Age UK Mid Mersey organised the Pass it On Awards 2019. The event celebrated the unsung heroes who have made a real difference in communities across Halton.

With kind support from donors such as Cheshire Police and Crime Commissioner, David Keane, Inovyn, Runcorn Rotary and Wellbeing Enterprises, the event at Halton Stadium was attended by more than two hundred guests, including dignitaries, stakeholders, staff, award winners and their family and friends.

The project was a great success, bringing together communities in recognition of the amazing efforts of both individuals and groups in Halton.

Building on this success, the 2020 Awards, rebranded as the Community Kindness Awards, are set to be even bigger and better. In spite of postponement due to the Covid-19 pandemic,



nominations are still being invited. Why not nominate your community hero for a 2020 Community Kindness Award.

For a nomination form and criteria, email:

communitykindness@aukmm.org.uk

National Campaigning

Our Gwen's a Star!

During December, Age UK and ITV worked on a Coronation Street story line about older people's experience of loneliness...and our volunteer Gwen became one of the stars!

As part of the collaboration with ITV, Age UK produced a series of adverts to be aired during the Coronation Street break on the run up to Christmas. Three older people from the Age UK network were selected to take part in the project and Gwen was one chosen. those of by our Accompanied Wellbeing Officer, Sarah Lloyd, she went to London to be filmed for one of the adverts. The film sees her talking about loneliness and how

volunteering her time at Age UK Mid Mersey helps both her and the charity.

As a volunteer, Gwen helps out at luncheon club events as well as sharing her suggestions, ideas and experiences on the St Helens Older People's panel.

Gwen often tells us that volunteering her time here at Age UK Mid Mersey has given her a sense of purpose and something to look forward to.



Watch Gwen's video at: https://youtu.be/ABygSlfTDy8



PASS IT 6 ON 0

Stop Press... from our Acting CEO - Shelley Brown

The period covered by this Annual Report closed as we entered a nationwide lockdown due to the Covid-19 pandemic. The impact that the pandemic had, and is still having, particularly on the elderly and most vulnerable members of society, will live in everyone's memory for a very long time.

In March 2020, Age UK Mid Mersey adapted quickly and responded with amazing resilience to provide much needed support and reassurance to older people in our region. During those first few weeks of isolation, our team had already made **more than 2,000 wellbeing telephone calls** and delivered **almost 700 emergency food parcels**. This work has



continued and expanded and next year's Annual Report will, I'm sure, cover in more detail the Charity's impact during the crisis.

Even from those first weeks in lockdown, we were supported by generous food donations and some fantastic volunteers. A huge amount of credit must also go to our staff and Trustees for their tremendous commitment and dedication. Together, they ensured that Age UK Mid Mersey was able to deliver strong and immediate services of the highest quality to those most in need. I am very proud of our early and continued Covid-19 response and it is, for me, one of our most significant contributions to our community.

I hope that the partnerships we strengthened and the new collaborations we have forged throughout these unprecedented times will serve as a positive legacy from the pandemic. 2020 will, without doubt, prove to be one of the most challenging years in our 25+ year history but we are optimistic that, with your support, the Charity will continue to make a difference to the lives of older people across our region.







Thank You!

We would like to say a massive and heartfelt thank you to all of our wonderful supporters, volunteers and stakeholders. Without your help, we could not do the work we do or reach those who need us the most.

Special mention to just some of our donors this year including:

Jayne Leponis Zurich Community Trust Mason Bibby 1981 Trust Asda St Helens Lord Cozens Hardy Trust Pilkington Trust Fourth Element Paranormal The Ravensdale Trust And, of course, our wonderful service users Ken Donaldson, Dennis Clark and Terry Smith

For Information and Advice please contact: 0300 003 1992

Age UK Mid Mersey (Head Office)

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