



# Age UK Mid Mersey *Annual Report*

April 2022-23



0300 003 1992

[enquiries@aukmm.org.uk](mailto:enquiries@aukmm.org.uk)

<https://www.ageuk.org.uk/midmersey/>

# ***Content Highlights***

- A message from our Chief Executive Officer and Chair
- Who we are
- Financial snapshot
- Summary of projects
- Summary of Living Well Service
- Administrative details



# *A message from our Chair and CEO*

This last year has been very much about building organisational resilience and we are very pleased with the progress that our charity has made in this reporting year. The Board and Senior Leadership Team of the Charity have taken a conscious and proactive approach towards planning and allowed time within this reporting year for a detailed review of the organisation to help shape the right strategies to ensure we remain resilient and prepared for whatever future challenges we may face. In summary we have:

- Revisited business continuity planning – We have taken time to review our business continuity plans to assess potential risks/challenges and implement appropriate strategies for continuity.
- Listened and learnt – we have consulted widely with clients, staff, and volunteers through surveys and independently run development days/consultation workshops to better understand the needs of our service users and to implement improvements as an organisation.
- Continuous improvement - engaged the services of an external business assessor to conduct an internal business review to help analyse the organisation strengths, structural weaknesses, opportunities and possible threats.
- Commissioned an external consultant to prepare two detailed business reports to establish areas for growth and competitive advantage.
- Invested in employee wellbeing and worked hard to embed it into our culture. Our staff matter to us and we want our staff to feel safe and valued at work, able to be their unique true self.

**Peter Stubbs**  
**Chair of Board of Trustees**



**Shelley Brown**  
**CEO**



# Who we are

## Our vision

*‘Empowerment and improved quality of life for people aged 50+ and their carers’*

Age UK Mid Mersey is a local, independent charity that is a brand partner of Age UK. This means we operate under the Age UK brand name, but source our own funding and set our own services.

We offer support to anyone aged 50+ living in Knowsley, St Helens, Warrington or Halton. We have been operating across Mid-Mersey since 2008, when Age Concern and Help the Aged merged to form what is now Age UK. We currently employ 19 staff members and have around 30 registered volunteers.

We provide a 'Living Well' service designed to work holistically with the individual. As our service is client-focus, our support differs from person to person.





# Financial Snapshot

## Income

**£564,644**

**Charitable Activities 87%**

**Donations & Legacies 11%**

**Trading Activities 1%**

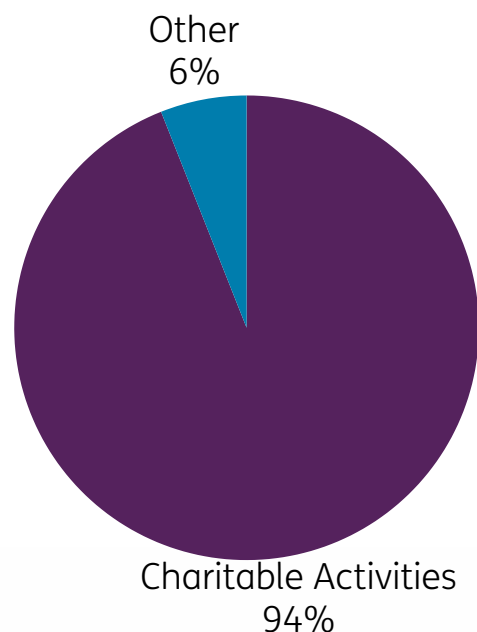
**Other 1%**

You can donate to us via Wonderful, a secure online platform that allows you to donate for free – it's quick and easy. Scan the QR code to get started.



## Expenditure

**£592,137**



# Projects

## Prosper

We continued to deliver the Prosper project - a clinical research project around frailty. So far, the project has been a success, resulting in it being extended until February. We specifically have been asked to continue our work with Prosper until then.



Other local Age UKs are also taking part in delivering this project: Age UK Leeds, Age UK Bradford District, Age UK Wakefield. To celebrate the project's success so far, we hosted a get-together at our head office - Mansion House - so that the teams could meet in-person and celebrate all their hard work in preventing hundreds of vulnerable people from deterioration.

## Highfield Hospital

We were asked to work in partnership with Highfield Hospital in Widnes, by going into local GP practices and supporting patients with issues such as isolation and loneliness to help prevent deterioration of overall health. The project durated for 6 months and in that time we provided support in 8 GP surgeries across Widnes.



# Projects

## Warm Homes

September 22 - March 23 we delivered our annual Warm Homes Project in partnership with E.ON Energy. A total 90 individuals each received:

- A Home Energy Check (carried out in their home), ensuring their home is energy-efficient.
- Information on how to save energy whilst keeping warm.
- Energy-efficient equipment such as draught excluders, window & door insulation and night lights, installed for them.

## Winter Wellness

During the winter period of 22-23 we supported 369 clients with winter pressures by:



- Support with accessing benefits, to ease financial burden.
- Providing information on how to look after yourself in winter months, to prevent health decline.
- Encouraging social engagement, including providing and signposting to warm spaces, to prevent and improve isolation and loneliness.
- Giving out 200 wellness bags containing items such as flasks, torches, gloves and blankets.





# Living Well Service

## Health and Wellness

- We supported 369 people through our Warm Homes and Winter Wellness projects.
- We carried out 171 four week interventions to identify any possible health risks, and signposted to necessary health services.
- We completed 400 home visits to identify any further risks and provide a more accessible and personalised service.
- We conducted approximately 1,600 telephone calls offering individual support to our clients.

## Social Inclusion



We helped people's minds and bodies to stay active by:

- Celebrating momentous occasions, such as the King's Coronation
- Encouraging light exercise such as new age bowling
- Facilitating other activities such as card games, dominos & mixed crafts
- Hosting regular quizzes



Our groups allowed 70 individuals to be more socially included and collectively gained 702 attendances!



# Living Well Service

## Personal Independence

We supported with 258 Attendance Allowance enquiries including:

- New claims
- Appeals and renewals
- Form filling and administration
- Backdating
- Change of circumstances
- Correspondence

*"I can now put the heating on without worrying about how much it will cost me"*



**APPROVED**

We supported 187 people with benefit checks and claiming additional benefits.

## Staying Connected

We supported St Helens Council in forming the Over 50s Strategy by surveying local clients and holding community consultations. We were able to feedback 386 unique responses and provide both qualitative and quantitative data.

We utilised our Halton expert panel to collect insightful perspectives for local organisations such as Halton Healthwatch and Liverpool City Region Combined Authority.



# Our Staff and Volunteers

As always we are immensely proud of the work and dedication of our staff and employees. Their integrity and care towards our service users doesn't go unmissed. We frequently receive positive feedback in regards to our staff and volunteers and, although it is never expected, we often receive tokens of appreciation.



[Staff and volunteer taking part in a community fundraising walk]

A big

## Thank You

to our volunteers!



[Some of our volunteers, new and old]



# Client Stories

Nancy lives alone and suffers with numerous health issues. She struggles with mobility and frailty.

*"I wouldn't have been able to complete the form if it wasn't for your help"*

One of our Living Well Officers completed a benefit check for the client and advised she may be entitled to attendance allowance. The Living Well Officer worked with the client to complete all the necessary forms.

The client later received a letter stating she has not been successful. Our Living Well Officer advised on how to request a mandatory reconsideration and encouraged the client to do so. The client was later awarded lower rate attendance allowance with a back payment of £720.

*"What Age UK Mersey has done for me is brilliant, my wellbeing has improved by 1000% - I cannot thank you enough"*

Jim is registered disabled, has poor mobility and lives alone. He was referred to us by another organisation after reporting he was feeling lonely, isolated and low. Due to his disabilities he was struggling to go out and had lost confidence in socialising.

One of our Living Well Officers referred Jim to Age UK National's 'Call in Time' telephone befriending service and to our own Men's group in St Helens. They also provided him with information on Merseylink to help cut down on transport costs.

Jim now receives a half-hour weekly phone call from a volunteer and enjoys a friendly chat. He also attends our Men's group in St Helens once a week. He said this has improved his mental wellbeing as well as giving him the confidence to go out for himself and has found himself speaking to his neighbours more.



# References and Administrative Details

**Charity Name:** Age Concern Mid Mersey

**Charity Number:** 1003476

**Company Number:** 2625647

**Registered Office:** The Mansion House  
Victoria Park  
City Road  
St. Helens  
Merseyside  
WA10 2UE

## Key Management Personnel

**Mrs. Shelley Brown**

Chief Executive Officer and Company Secretary (appointed April 2021)

**Mrs. Bridgid Dineen**

Charitable Services Director (appointed August 2021)

**Mrs. Amanda Foxcroft**

Finance Manager (appointed August 2021)

Keep up to date by following us on...



Age UK Mid Mersey



@AgeUKMidMersey



@ageukmidmersey



@ageukmidmersey



Age UK Mid Mersey

## Directors and Trustees

The directors of the charitable company (the charity) are its trustees and are collectively referred to as the trustees.

The trustees serving during the year, and since the year end, were as follows:

Elected Trustees: Mr. Peter Stubbs (Chair)  
Mrs. Susan Haden (Vice Chair)  
Mr. William Arnold  
Mr. Colin McKenzie  
Mr. Nigel Thompson

In accordance with the Articles of Association, at the Annual General Meeting the following trustees retire by rotation and, being eligible, offer themselves for re-election at the next AGM:

Mr. Peter Stubbs  
Mrs. Susan Haden

### Auditors

Livesey Spottiswood  
Chartered Accountants &  
Registered Auditors  
17 George Street  
St. Helens  
Merseyside  
WA10 1DB

### Solicitors

Fordshams Solicitors  
17/19 Hardshaw Street  
St. Helens  
Merseyside  
WA10 1RB

### Senior Statutory Auditor

Mr. D Hudd BA FCA

## The organisation has accounts in the following Banks:

Barclays Bank  
19 Church Street  
St. Helens  
Merseyside  
WA10 1BG

Cambridge & Counties  
Bank Ltd  
Charnwood Court  
New Walk  
Leicester  
LE1 6TE

United Trust Bank  
1 Ropemaker Street  
London  
EC2Y 9AW

Shawbrook Bank  
Lutea House  
Warley Hill Business Park  
Brentwood  
Essex  
CM13 3BE

Redwood Bank  
The Nexus Building  
Letchworth Garden City  
SG6 3TA