

# AGE UK MID MERSEY

## ANNUAL REPORT 2022

### CHAIR AND CEO COMMENTS

This has been an important year for Age UK Mid Mersey.

As the country began to recover from the pandemic, we started the year with the permanent appointment of a new CEO, Shelley Brown, following an interim acting up period. We were delighted to recruit from the internal team. With almost 20 years' service with the organisation, you could say Shelley is 'home grown'. With the support of a newly formed Senior Leadership Team and Deputy CEO, she has brought much needed stability to the organisation in a year of intense change and immense challenge.

This was the first year of a new 18-month strategy refresh, which came into effect in September 2021 following full consultation and development with our Board members and staff team. Our short-term strategy is ambitious and acts as a road map that will allow us to consider and plan for future sustainability by embracing new and innovative forms of income and developing our services, staff, governance and operating models.

We have taken time to proactively invest in building organisational infrastructure and developing new ways of working to respond to the emerging needs of Older People.

As previously reported, we introduced a new Wellbeing Model towards the end of year 20/21, which is now fully embedded across the organisation, integrating health and social care through person-centred services and a holistic programme of wellbeing support that is aligned to the new Integrated Care Systems.

We have a renewed approach to quality and standards that places service user experience and outcomes as the primary objective, as well as recognising the importance of how we as an organisation continually learn and respond in order to improve our service provision.

Our cash reserves, prudent financial management and scrutiny of organisational spending against budget has ensured that we could meet our financial obligations and continue to provide essential support to older people. However, whilst we have benefited from continued commissioned contracts with local government, as we look to the future it is clear that Age UK Mid Mersey will need to work much harder to secure sustainable funding in the years to come and explore new innovative ways to generate income, including the development of paid for services.

We are thankful for the new partnerships that have been forged, as we collectively strive to maximise the benefits of support available to older people, including a range of commissioners, voluntary sector organisations, health care providers and Age UK brand partners.

We are immensely proud of how we responded as we emerged from the pandemic. The staff team have evolved and re-formed with continued resilience, determination and commitment as we have adapted to the many changes that the pandemic enforced onto older people and the services and activities we operate. Without doubt, we have seen the very best of our staff team over the last 2 years and are incredibly grateful for everything they have done.



*Peter Stubbs*  
Peter Stubbs, Chair



*Shelley Brown*  
Shelley Brown, CEO

**"To promote improved quality of life and empowerment for older people and their carers."**

## OUR SIX STRATEGIC AIMS:

- Aim 1: Consultation and Coproduction**  
Engage in ongoing consultation with older people and stakeholders to identify needs and inform Charity's strategy, campaigning on the issues affecting older people and developing inclusive service provision in coproduction with our diverse community of older people, partners and stakeholders.
- Aim 2: Maintaining and Improving Quality**  
Improve and maintain quality of output, data and intelligence by achieving relevant accreditations and ensuring systems and processes underpinning the organisation are fit for purpose.
- Aim 3: Financial Stability**  
Ensure the organisation remains financially stable by increasing income generation.
- Aim 4: Building Identity and Raising our Profile**  
Improve identity and profile of Age UK Mid Mersey by developing a marketing and communications plan, aimed at promoting consistent brand and messaging internally and externally.
- Aim 5: People (Trustees, Staff and Volunteers)**  
Create a 'Roadmap for Recruitment, Retention and Reward', developing a long-term plan to ensure Age UK Mid Mersey recruits and retains quality, dedicated and committed trustees, staff and volunteers.
- Aim 6: Age UK Mid Mersey Accommodation**  
Ensure Age UK Mid Mersey office locations and outreach venues are fit for purpose, offer safe, practical and comfortable working environments for staff and allow for expansion of our provision.

## FINANCIAL REVIEW 2021/2022

Our income for the year was **£569,874** (2021 - £778,146). The reduction in income during the year of £208,272 is largely due to a reduction in support grants received in respect of Covid-19 of £127,603 but also, a £10,500 legacy received in the previous year, a reduction in grants in respect of charitable activities of £37,171 and a reduction in other sources of income of £33,957.



### **INCOME £569,874**

**Charitable Activities 91%**

**Donations & Legacies 6%**

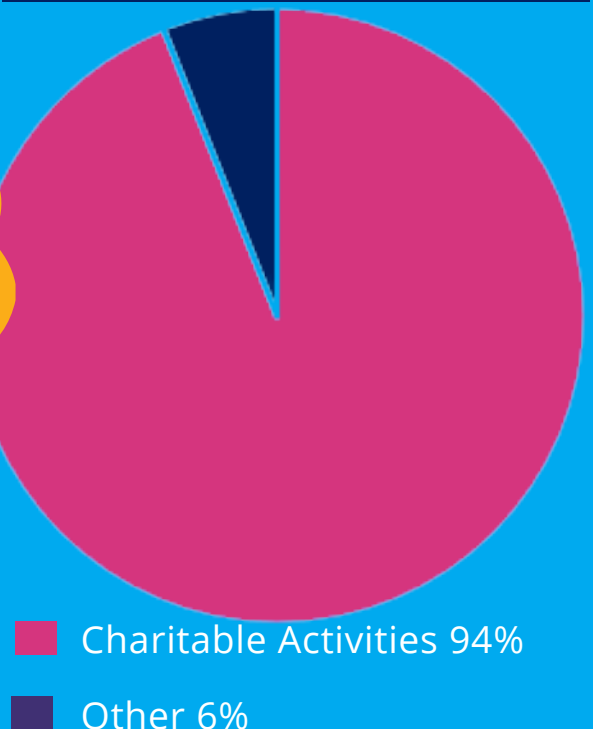
**Trading Activities 2%**

**Other Income 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 below to get started. You can also text **AUKMM to 70085**.



### **EXPENDITURE £557,091**



# LIVING WELL

Age UK Mid Mersey believes **quality of life is possible for all** - no matter our age, personal circumstance or background. Age UK Mid Mersey offers a genuine, inclusive service working with people aged 50+ living in the Mid Mersey area (Halton, St. Helens, Warrington and Knowsley). We deliver a personal approach that listens to our clients' needs and works with them to help achieve the outcomes they identify. We are holistic and person-centred, which means we provide one to one personalised information and advice, activities and support helping people achieve a quality of life that enables them to live independently in the way they choose.

Our team are skilled, experienced and dedicated to making a difference to the communities we serve. **AUKMM are leading pioneering work, alongside working in partnership on specialist programmes.** Examples include; Prosper - a Personal Independence clinical trial around Frailty, a highly successful Veteran programme addressing loneliness and isolation and an innovative support programme in a local Prison.

We are committed to being an accessible, inclusive organisation- and have prioritised **Equality, Diversity and Inclusion.** The whole organisation has undergone training and skills development, and we are embarking on some exciting work in this area - keep updated via our website and social media.

**All the work we do and services we provide address local needs.** We are fully aware of the movement across health and social care sectors, with Integrated Care Systems and changes that are imminent for localities. We appreciate the ever-increasing demands on all services and the compounding issues of Covid impact; especially on our more vulnerable population. We are a trusted organisation that is seeing more challenging situations, which our clients are living with and our aim is to work alongside our partners- providing the much needed early intervention and prevention services that can and will mitigate against these issues. To state again- we know that a Quality of Life is Possible for all and we continue to dedicate ourselves towards achieving this.

**Our main successes are outlined below:**

## LIVING WELL...

### HEALTHY AND WELL

**214** people supported with winter pressures, including:

- Transport to hospital and vaccination appointments
- Welfare/companionship
- Information and advice
- Shopping



Average **100** clients throughout the year who benefit from assisted intervention over a 6 week period, to tackle isolation & loneliness.

**275** Wellbeing Parcels delivered with a combined value of **£7K.**

**200** warmer home energy checks completed with clients at risk of fuel poverty also benefiting from the installation of energy efficient equipment (e.g. draught excluders, power-down sockets, lightbulbs) with a combined value of

**£4,500.**

### SOCIALLY

**1,840** attendances at community setting groups and online activities, including Men's group, Digital Inclusion, Crafts, Coffee & Chat.

Approx. **3,680 HRS** social connection time.



### INDEPENDENTLY

**187** older people supported with the application of Attendance Allowance with successful outcomes resulting in approx. **£794K** of additional benefits.

Approx. **1600** clients screened to identify risks and implement proactive interventions, often requiring assisted referrals to external partners and ongoing follow up wellbeing calls.

### CONNECTED

Through community inclusion and engagement, we continue to engage with our community and listen to their wants and needs. We help shape services and campaign important issues.



## ACHIEVEMENTS AND PERFORMANCE

Resilience has been critical to individual and organisational sustainability over the past year. Our brand is trusted and respected, we are immensely proud of the work we have undertaken this year, and the positive outcomes achieved for older people. We have provided a range of social inclusion initiatives that tackle isolation and loneliness and support people towards resilience building and promoting long term sustained change.



# 'MERSEY VETERANS TOGETHER'

Age UK Mid Mersey gratefully received £10,000 to deliver a bespoke 'Mersey Veterans Together' project across the Mid Mersey area - covering Halton, St. Helens, Knowsley and Warrington. The focus was to rebuild confidence and social interaction, tackling isolation, loneliness and the mental health impacts of the pandemic. We re-established and enhanced our face to face services to deliver Veteran specific groups and support, targeted social groups for men only and other community based and virtual activities to enable them to

## 'Love Later Life'



### THANKS TO THE PROJECT...

- **180** veterans have been screened and received a 'Think Good, Feel Good' parcel - 110 of these have been further supported by Age UK Mid Mersey.
- **42** Veterans were supported with Information & Advice.
- **35** veterans were supported with/and received a free home energy check which includes free energy efficient equipment installed within their property.
- **32** Veterans were supported by both Cheshire Fire Service and Merseyside Fire Service for Home Fire Safety Checks.
- **21** veterans have been supported with further wellbeing calls, to include regular friendship calls and referrals to Silverline Call.
- **12** veterans supported attend our coffee & chat activity group across our locations - 6 participants now attend on a regular basis.
- **2** veterans are now supporting with volunteer roles.

## BELOW IS A SNIPPET OF A CLIENT STORY COMPLETED BY ONE OF OUR WELLBEING OFFICERS THAT CAME FROM THE 'MERSEY VETERANS TOGETHER' PROJECT.



SCAN ME FOR MORE CLIENT STORIES

*"I have noticed a change in his persona since attending the group and we are thankful for the support AUKMM have given him."*

**ER SON**

*"It's lovely to get out and meet such lovely people who are in or have been in similar position to myself."*

**ER**



*'ER is a 93-year-old man who lives in the Rainhill area of the borough of St Helens. He originated from Liverpool and moved to St Helens when he married. He has two sons who live close by. Sadly, he lost his wife in August 2020. At the age of 14, he had a job delivering laundry by horse and cart until at the age of 18 he received his call up papers to do his national service at Bicester, guarding German prison soldiers of war. After national service, he returned to Liverpool. He studied engineering and took up a position at an aircraft company working his way up to manager; he worked there until he retired.*

*ER was referred to Age UK Mid Mersey by Merseyside Police following a scam incident. ER was assessed as part of our screening requirement, and upon screening we identified ER as a veteran.*

*A meeting was arranged for a Wellbeing Officer to visit ER at his home - he was found to be low in mood, struggling with confidence and reluctant to go out. Arrangements were made to take him out to visit AUKMM community groups in St Helens. At the group he was quiet at first but with encouragement he started to chat and participate in activities. He stated it was good to get out and about, he enjoyed meeting likeminded people and was enthusiastic about returning to the group.*

*ER now regularly attends the men's group on a Monday afternoon; he is very engaging, chatty and has good banter with the other men who attend. ER feels confident to openly talk about his feelings since losing his wife - he discusses about the time he served for his country which is something he is really proud of. He expresses how accessing the group has really helped him. A volunteer took ER and a fellow client to New Brighton for the day, this brought back lovely memories of days gone by.'*

# OUR STAFF AND VOLUNTEERS

We always aim to deliver the highest quality in our services and to give our clients and partners we work with the best possible experience. This would not be possible without our team of staff and volunteers who are passionate about the work we do.

We continue to be impressed by the resilience and focus of our staff and volunteers as they have navigated the challenges of the last 2 years. The organisation has gone through a major transformational change during the last year and we have invested significantly in our staff over that time and have built a strong development culture.



★ *Our team received a special award for their amazing dedication and commitment.*

We are proud to offer our staff access to the latest training. Two Members of the Senior Leadership Team are due to embark on a Level 5 Leadership and Management qualification fully funded by the apprenticeship scheme. A number of our Wellbeing Officers have trained as Mental Health First Aiders and are undertaking the Care Certificate.

***"Our volunteers are the lifeblood of our work."***

We have so many outstanding volunteers who dedicate their time, knowledge and talent to help make a difference in the lives of older people. To those who facilitate groups, digital buddies, help in our office and at events, we absolutely could not continue to deliver our services without you.

Meet Tommy, one of our volunteers at Age UK Mid Mersey who has been volunteering for us for 6 years!

We asked Tommy what made him want to volunteer with us?

***"I volunteer with Age UK Mid Mersey as I get to help others whilst keeping myself active. I get a buzz out of helping others, it's a real feeling of fulfilment"***



## VOLUNTEERS

We had approximately **45** volunteers supporting us regularly throughout the year, collectively giving a total of

**6,400 HOURS!**

Using the living wage as a basis for calculation, this equates to a contribution in kind of **£57,736** for the year.

*Thank you!*



# REFERENCE 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. Yvonne Rea**

Wellbeing Services Manager (appointed August 2021)

### **Mrs. Amanda Foxcroft**

Finance Manager (appointed August 2021)

## 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. John Chapman  
Mr. Raymond Travies  
Dr. Ivan Camphor (resigned November 2021)  
Mr. William Arnold  
Mrs. Christine Mortimore (resigned October 2021)  
Mr. Colin McKenzie

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 STATUORY 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

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

Redwood Bank  
The Nexus Building  
Letchworth Garden  
City  
SG6 3TA

United Trust Bank  
1 Ropemaker  
Street  
London  
EC2Y 9AW

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