



Annual Review  
2020

Making Norfolk a great place to grow older

Supporting  
& Enabling



Maintaining  
& Developing



Listening  
& Consulting



Advising  
& Informing



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## Introduction from the Chair and the Chief Executive

Our operational and business agility, the quality and excellence of our services and the commitment, generosity and resilience of our staff and volunteers in the face of unprecedented change emerge as strong themes when reviewing the past year.

Implementation of our plans to consolidate and to strengthen the future sustainability of the charity continued into the early part of the year. These activities included the closure of our charity shop in Sheringham, the transfer of our respite and housing with care services in Costessey and the move to new offices at the Henderson Business Centre.

In addition, aided by representatives from our membership, the Norfolk Council on Ageing, we set about forming a working group to review our governance framework. The review, representing five months of joint working and close consultation with our membership resulted in the formation of a new governance structure commensurate with the size and capacity of the charity, including a new associate membership and Articles of Association.

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***During the year we were successful in maintaining the Age UK Information and Advice Quality Programme and the independent charity Quality Standard.***

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We are one of 700 local advice services providing social welfare advice to hold the standard across England and Wales. We were also successful in attaining the Age UK Charity Quality Standard which recognises the high standard of our performance as an organisation.

The standard is externally assessed and awarded to members of the Age UK Network that have demonstrated they are well governed and managed; have a clear direction and strategy and are committed to ensuring the well-being and safety of older people, their staff and volunteers.

Our ability to have achieved so much during the year and our focus on quality and on our core service provision serving the needs of our beneficiaries throughout this period of change is testament to our wonderful team of staff and volunteers. Their commitment to maintaining our high standards, their energy, generosity of spirit and willingness to embrace the changes we have had to make is truly humbling and we thank them wholeheartedly.



**Hilary  
MacDonald**  
Chief Executive



**Jeff  
Prosser**  
Chair

# Chief Executive and Chair Strategic Overview

Our strategic plan identified three priorities for 2019-20:

1. Loneliness
2. Poverty
3. Dementia

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**244 people benefited**  
with telephone befriending



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**£4,865,170**  
of benefits claimed for people



## 1. Loneliness Priority

→ We were successful in raising **£29,116** to fund our befriending service.

During the year, we delivered weekly befriending calls to 244 older people and by financial year end maintained the number of befriending volunteers at 111. In total 3,344 hours of befriending calls were made to lonely and isolated older people.

## 2. Poverty Priority

→ We helped people claim **£4,865,170** in benefits (**£365,170** in excess of our target).

In order to meet the increasing demand for information and advice and benefit related enquiries we continued to develop our triage function and we have increased the number of staff authorised by the Department for Work and Pensions to complete benefit claim forms online.

Our Information, Advice and Advocacy service was successful in maintaining the Age UK Information and Advice Quality Programme and the independent Advice Quality Standard in March 2020.

### 3. Dementia Priority

#### → We took the first steps towards development of Age Friendly Communities

In taking first steps towards the development of Age Friendly Communities we promoted and distributed the dementia café toolkit, a step-by-step guide to setting up and running a dementia friendly community café. [Download it here >](#)

Due to the necessary focus on our restructure activities we were not in a position to submit a full grant application for the funding of Age Friendly Communities.

We commissioned a survey to help understand what an Age Friendly Community in Norfolk should look like. In the summer of 2019 we undertook a second survey to check the relevance of our original findings. The second survey confirmed the need for Age Friendly Communities remains unchanged.

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**Dementia  
Cafe toolkit**  
*step-by-step  
guide*

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# Our Services

In November 2019, staff, volunteers and members of the Norfolk Council on Ageing came together in a series of workshops to help develop a new strategic plan for Age UK Norfolk.

Representatives from each workshop were invited to present proposals to the Board of Trustees Meeting in November. New strategic priorities formulated from these proposals were formally agreed by Trustees in January 2020. Our strategic plan is organised around four themes and four key priorities:

## Advising & Informing



Advice Line, Benefit Take-Up, Outreach and Lasting Power of Attorney services.

[More >](#)

## Supporting & Enabling



Telephone befriending Advocacy services, Money Matters, Bereavement and new on-line programmes.

[More >](#)

## Listening & Consulting



Norfolk Council on Aging and other local and national forums.

[More >](#)

## Maintaining & Developing



Retail and fundraising activities alongside the central functions of the charity.

[More >](#)

# Advising & Informing

## Last year we said we would:

- Help older people in Norfolk claim £4.5 million in benefits entitlement to reduce poverty and increase their choices and independence.
- Maintain the capacity of our Helpline to help meet the increasing demand for information and advice.

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***“I was very impressed with all the help and advice the representative gave me.”***

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## Here's what we achieved...

→ **£4,865,170**  
**in benefits**

We helped people claim £4,865,170 in benefits – **that's £365,170 in excess of our target.**



→ **15,000 calls**  
**to our advice line**

We received over 15,000 calls to our advice line – maintaining a similar capacity as previously but actually reducing repeat callers by utilising our triage function effectively.

→ **1397 home visits**

We made 1397 home visits with attendance allowance being the main benefit older people were seeking support with – we have increased the number of staff authorised by the Department for Work and Pensions to complete benefit claim forms online.

# Supporting & Enabling

## Last year we said we would:

- Raise £34,000 to fund our befriending service to enable us to meet the increasing numbers of older people in Norfolk who are lonely and isolated turning to us for help.

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***“On Thursdays I know I will have someone to talk to, contact with the outside world.”***

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## Here's what we achieved...

### → **£29,116 for our befriending service**

We were successful in raising £29,116 to fund our befriending service. During the year, we delivered weekly befriending calls to 244 older people and by financial year end maintained the number of befriending volunteers at 111. In total, 3,344 hours of befriending calls were made to lonely and isolated older people.

### → **Demand and offers to volunteer**

In April 2020 we saw an increase in both demand and offers to volunteer and we envisage that loneliness will continue to be a priority for many people as we approach the colder and darker winter months; we continue to work with funders to ensure this service remains available.



# Listening & Consulting



## Last year we said we would:

- Raise funding to develop Age Friendly Communities.
- Involve older people, businesses and community groups in helping us plan and develop Age Friendly Communities to reduce loneliness and isolation and support people with dementia.

Community in Norfolk should look like, shortly before the UK lockdown we undertook a further survey to check the relevance of our original findings. The second survey confirmed the need for Age Friendly Communities remains unchanged.

## Here's what we achieved...

### → Development with Age Friendly Communities

Following the impact of COVID-19 we remain committed to involving stakeholders in planning and developing Age Friendly Communities. Further to the consultation we commissioned in 2017 to help understand what an Age Friendly



### → Dementia friendly community café

We promoted a step-by-step guide to setting up and running a dementia friendly community café. [Download it here >](#)

# Maintaining & Developing

**We are very grateful for all of our supporters.**

**Here's what we achieved...**

**→ Raised £350,850 of income**

We successfully raised £350,850 in unrestricted income from Retail and the Elms.

## **Our Charity Shops**

Our stores in Dereham and King's Lynn are popular bargain hunting grounds with a wide variety of items all at incredible prices. Both stores were closed in response to the national lockdown as an impact of COVID-19; we successfully reopened in July 2020 with positive trading activity; we are further increasing the sustainability of this income by increasing our retail presence with the addition of online shopping portals.



## **The Elms Business Space**

Business at the Elms continued to grow with repeat and new bookings, generating income to support Age UK Norfolk's sustainability, however the Elms also closed in response to the national lockdown as an impact of COVID-19. We took this opportunity to move in and reduce our central office overheads and look forward to re-opening our most popular room for booking in the autumn of 2020.

## **Other sources of funding included:**

**→ Donations and gifts of £58,018**

**→ Fundraising of £55,950**

Our fundraising activity exceeded targets and we will continue to develop our corporate relationships with businesses across Norfolk in line with our Age Friendly Communities work. We will also aim to provide more social opportunities to engage with Age UK Norfolk via quizzes and music events.

# Achievements Overview



**3,344**  
hours of telephone  
befriending  
provided



**925**  
people helped with  
welfare benefit  
applications

**15,203**  
calls to our  
advice helpline



**£4,865,170**  
income for older  
people through  
successful benefit  
applications



**244**  
people provided  
with Telephone  
Befriending  
support

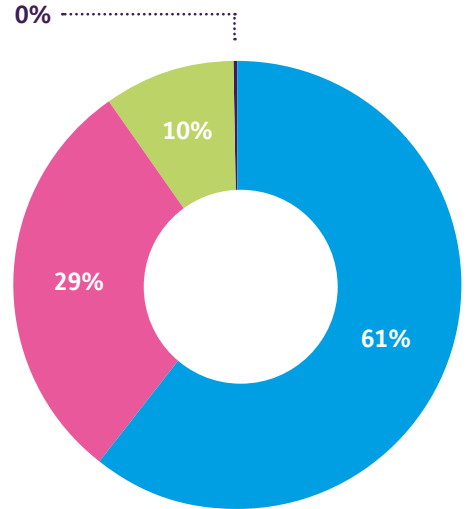


# Financial Summary

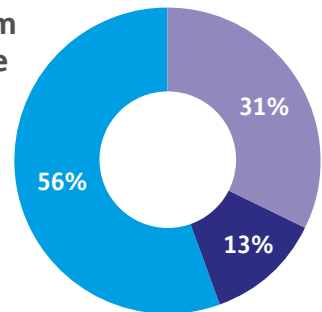
## Here's how we got our funding:

- **Charitable Activities £635,294**  
This includes contracts and grant income for running our charitable services.
- **Trading activities £310,582**  
This includes sales income from our Charity shops and the Elms Business Space.
- **Donations and legacies £100,722**  
This includes income from supporters remembering us in their will; alongside one-off and recurring donations.
- **Investments £172**  
Interest received from bank deposits.

**Income: £1,046,770**



**61% of income came from charitable activities**



**Grants £199,806**

**Goods and Services £82,614**

**Service Contracts £352,874**

## Here's how we spent our funds:

→ **Advising and Informing £528,065**

This is providing information, advice and advocacy services.

→ **Supporting and Enabling £138,673**

This is providing telephone befriending services and the final month of our care provision.

→ **Listening, Consulting and Involving £42,316**

This is involving people in planning, developing and delivering our service.

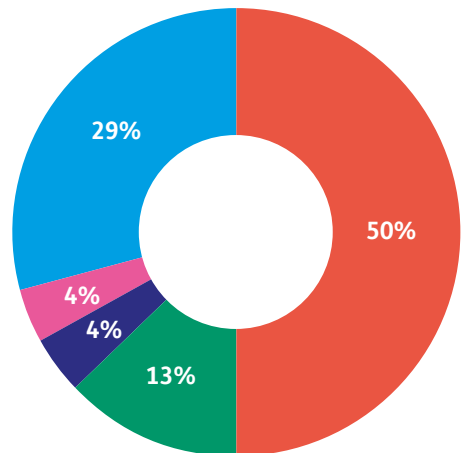
→ **Training and Upskilling (Maintaining and Developing) £44,057**

This is supporting and training our staff and volunteers, ensuring we are delivering high quality services and support functions to the organisation.

→ **Income Generation and Other Costs £298,475**

This has involved developing additional sources of income including our charity shops and developing the Elms Business Space; also ensuring correct governance and finance structures are operated.

## Expenditure: £1,051,586



# Supporting our work

Our wonderful achievements over the last 12 months wouldn't be possible without our incredible team of staff and volunteers. Without their hard work, skills, time and dedication to our mission, these achievements would not be possible - thank you all for everything that you do!

**A huge thank you to all of our donors, friends, funders and corporate sponsors** we could not provide our services without your support.

**Special thanks to our supporters** including Norfolk Community Foundation, Notcutts Garden Centre, Pure Recruitment, Birketts Solicitors and the East of England Co-Op.



## How you can help >

- Make a donation
- Leave us a gift in your will
- Support us as your charity of the year
- Start a fund-raiser for us
- Donate your unwanted items to our retail outlets





For more information, visit our website [ageuknorfolk.org.uk](http://ageuknorfolk.org.uk) or contact our fundraising team on 01603 787 111 [fundraising@ageuknorfolk.org.uk](mailto:fundraising@ageuknorfolk.org.uk)



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