

Annual Report 2018-2019

*“To know how to grow old is the master work
of wisdom, and one of the most difficult
chapters in the great art of living”.*

Henri-Frédéric Amiel



The year in brief

During the year April 2018 to March 2019 referrals into our services grew both in number and complexity. This year we experienced a 29.3% increase in our Compass casework, a significant part of this increase was the continued growth of referrals into the Barrow Gateway office. Alongside this the Community Action Team also had a very busy and rewarding year, not only supporting and expanding our social engagement offer in South Lakeland but opening up several new social engagement opportunities in the Barrow and District area.

In August of the year we were informed that Public Health, Cumbria County Council was not going to continue to fund the Compass in Cumbria project past the end of the second year due to significant cuts to County Council Funding. This meant that in order to ensure the charity could survive and continue to deliver the services and social engagement opportunities for our clients a re-structure of the organisation was required. The re-structuring process was implemented during the second half of the year, great care was taken to minimise the impact on our ability to continue to deliver valued services and social engagement opportunities.

Inevitably the restructuring meant that we needed to make some redundancies, in total once the re-structuring process was completed we had lost nine full time members of staff. We also had to make some difficult decisions regarding the Kendal Gateway Centre, whilst this had been an excellent resource over the past five years, the drain on our financial resources could no longer be sustained and consequently the Kendal Gateway was closed at the end of the year.

Our service delivery in the Barrow and District area was largely funded by the Compass in Cumbria project. In order that those much needed services could continue to be delivered, we proposed the opening of two retail outlets in the Barrow and District area to generate enough income to maintain those services. Sadly, by the end of the financial year we had not received the necessary agreements from Age UK Barrow and District to enable us to proceed with the plan. The withdrawal of services from the Barrow and District area was therefore looking highly likely by the end of the financial year.

The result of our re-structuring has resulted in a slimmed down management team and the merging of two key departments under one supervisor and services manager. The work significantly reduced our operating costs whilst keeping the impact on service and social engagement to a minimum. Inevitably there will be an impact from all these cuts with some of the local influencing and partnership development work becoming more difficult to fully engage with.



It is a testament to the Age UK South Lakeland team's commitment that throughout this very difficult period, all the management team and staff fully participated with the process and ensured that all our activities and services continued to be delivered to the normal Age UK South Lakeland high standards. I would like to say a heartfelt thank you to all the staff and volunteers, both current and those who are sadly no longer with the charity. In December our Chief Officer Penny Pullinger decided to move to Norwich to be closer to her family, whilst Penny had always planned to do this, she brought forward her plans in order to support the charity's need to cut costs. Penny had been with the charity for ten years in various roles, starting as the Village Agent Manager then Services Manager, culminating with her taking on the role of Chief Executive Officer three years ago, Penny enjoyed the support and respect of all the team and she will be sadly missed.

A handwritten signature in black ink, which appears to read 'H Tomlinson'.

Hugh Tomlinson
Chief Executive Officer

Our Organisation

Age UK South Lakeland is an independent registered charity no 1141415

Formerly known as Age Concern South Lakeland, the Charity was established in 1978 and was registered as a company limited by guarantee, No 07540805, from 1 April 2011. All assets and liabilities were transferred to the new charity starting on 1 April 2011.

Age UK South Lakeland is a brand partner with Age UK and a member of the Age England Association of Age UK brand partners.

Registered office:

Age UK South Lakeland, 17 Finkle Street, Kendal, Cumbria LA9 4AB

Enquiries: 01539 728118 or admin@ageuksouthlakeland.org.uk

Chief Executive Officer:

Hugh Tomlinson

Purpose

Age UK South Lakeland exists to improve the lives of older people in South Lakeland.

Our ambition is that in South Lakeland everyone in later life:

- Has a decent income.
- Can feel well and enjoy life as much as possible.
- Can access high quality health and care services.
- Feels comfortable, safe and secure at home.
- Feels valued by their local community with opportunities to join, volunteer, learn or work.
- As a citizen with rights, has their voice heard and can influence decisions that affect them.

Our strategy as we work toward this ambition over the next three years is to work with older people and for older people in order to:

- Provide information, advice and assistance, helping people to access benefits and exercise choice to make best use of their resources and improve their experience of daily life.
- Help build stronger communities that increase people's social contact and wellbeing.
- Support the development of more responsive health and welfare services that offer people holistic and timely services reflecting their needs and circumstances.
- Help the voices of older people to be heard.
- Generate independent income streams that enable us to invest in activity which is not a current public sector priority.

Our ambitions cannot be achieved by our actions alone within South Lakeland. We will continue to work with and through Age UK nationally, with whom we are Brand Partners and have a shared overall strategy. We will also work with the other Age UK groups and any other partners across Cumbria who share our ambition. As we develop our annual business plan which sets out the actions to deliver strategy, we will:

- Gather and use evidence
- Involve older people
- Respond to the particular challenges of dispersed and rural communities in South Lakeland.
- Develop partnerships and the means for strong collaboration within the third sector and with statutory organisations.
- Seek to ensure that our input contributes to lasting improvements for individuals and their communities.

We have adopted a set of values which should be evident to older people, our staff, volunteers and partners in all aspects of our work. They are to:



- Be respectful
- Be inclusive
- Be positive
- Be realistic
- Be empowering
- Make a difference in people's lives

The Trustees confirm that they have referred to the guidance in the Charity Commission's general guidance on public benefit when reviewing the Organisations Aims and Objectives and in planning future activities.

People

By the end of the year the Charity was supported by **159** individual members and **22** groups and organisations.

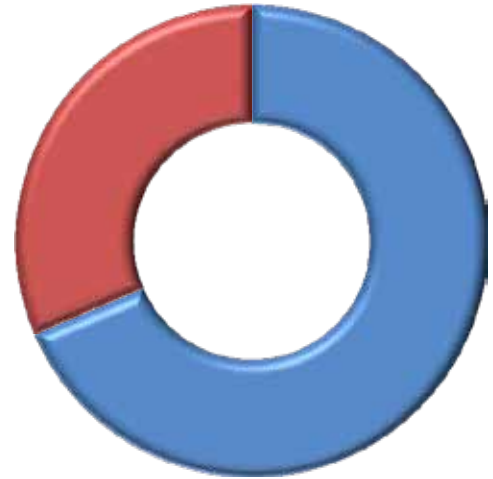
Staff and Volunteers

By the end of the financial year, the charity had reshaped itself to enable the proposal of a sustainable budget for the Trustees to consider and approve for the following year. By this time it was becoming clear that the continued delivery of services in the Barrow and District area was increasingly unlikely, therefore plans were formulated for an orderly withdrawal from the district. The figures and structure also include the loss of staff from the Barrow and District office.

The value to the charity of the Volunteer contribution cannot be overstated. Our Social Engagement work and Retailing operations would quickly grind to a halt without that contribution. Using the national £10 per hour minimum living wage, our volunteers donate **£400,500** worth of their time to the charity.

Paid Staff and Volunteer hours at the end of the financial year

Paid Staff - 87,386 hours pa
Volunteer - 40,050 hours pa



Staffing distribution

At the end of the financial year, the charity employed 38 Full time staff and 19 Part time staff.

NB. The reduction in staffing due to the closure of the Barrow and District office has also been included in this calculation - 4 Full time staff.

This means that the charity employs **48 Full time equivalents.**

Gender Pay Comparisons

The charity employs 24 male and 32 female employees.

The average salary for a male employee is £19,607.50.

The average salary for a female employee is £19,564.50 - a difference of £43.00 or **0.22%**.

Distribution of staffing at the end of the financial year

Retail - 23 FT - 11 PT
Client services - 8 FT - 5 PT
Shared services - 7 FT - 3 PT



Senior Managers

Hugh Tomlinson
Chief Executive Officer

Pam Lewis
Deputy Chief Executive Officer

Management Team

John O'Brien
Head of Retail

Phil Whiteley
Partner Relations Manager

Julia Sunderland
Finance Officer

Organisational Departments

Shared Services

Shared Services provides the organisation with all the key operational services we require in order to ensure that the charity runs as efficiently and as cost effectively as possible. It is also responsible for sharing our activities through Social Media.

Those key services are:

- Financial oversight, management, monitoring and controls.
- HR management and support.
- Administrative services.
- Communications internal and external.
- Management and Board support services.

Staffing

Full time staff	7
Part time staff	3
Total of paid hours	15,886
Number of Volunteers	2
Volunteer Hours	520

Client Services

The Client and Social Engagement (CASE) department provides holistic, confidential, independent advice and support using the Compass methodology. The CASE department also provides a wide range of Social Engagement opportunities.

Those key services include:

- Easy to access first contact – Helpline
- Information and advice.
- Holistic assessments and Compass casework.
- Access to third sector services – eHub, MARS
- Social Engagement opportunities.
- Volunteer recruitment, training and support.

Staffing

Full time staff	8
Part time staff	5
Total of paid hours	19,656
Number of Volunteers	176
Volunteer Hours	17,108

Retail

The retail department generates unrestricted income for the charity, by operating traditional high street shops, superstores, a warehouse and online sales. All outlets sell new and donated goods, and we maximise our Gift Aid contributions.

Retail does this by:

- Operating 4 traditional high street shops.
- Operating 3 Superstore's and a warehouse.
- Selling goods online via third party sales sites.
- Providing management oversight ensuring good practise across the retail estate.

Staffing

Full time staff	23
Part time staff	11
Total of paid hours	51,884
Number of Volunteers	82
Volunteer Hours	22,420

Grant and Trust income for the year 1st of April 2018 to 31st of March 2019

Agnes Backhouse Charitable Trust	£1,000
Age UK Retainer	£15,000
Age UK Warm & Well Grant	£18,250
Age UK Support Services NW	£800
Age UK Ambitions for later life	£19,250
E ON Handyperson home energy	£9,000
E ON Warm Homes plus	£5,788
E ON Benefits take up	£9,920
CCC Operation of Compass in Cumbria Online	£32,754
CCC Place Based Prevention Programme (CiC)	£232,500
Eric Wright Grant	£10,000
One Digital Project	£35,600
National Westminster Financial Inclusion	£17,451
Big Lottery Reaching Communities	£98,548
Digital Leadership Fund	£28,324
Morrisons Foundation Grant	£11,928
Sobell Foundation	£6,000
BWB Stephen Lloyd Award	£2,000
Gateway Group for Exercise classes	£500
Rayne Foundation Grant	£5,000
Total income for the year	£559,613

Grants for re-distribution

Agnes Backhouse Charitable Trust	£15,000
CCF Winter Warmth	£43,200

Social Engagement Opportunities

The impact of loneliness or being isolated on older people cannot be overestimated. Living in a beautiful area like South Lakeland has many benefits, however as we get older any number of things can happen that can totally change our lives. Our families may move away for work, our close group of friends diminishes; our ability to get out and about can become more difficult due to ill health. For any number of reasons, getting older often brings with it a significant lifestyle change.

How we cope with the changes getting older brings can have a major impact on our health and wellbeing. Often the changes can sneak up on us and before we know it we are hardly going out, have lost contact with most of our friends and have very little contact with family. If this goes unchecked, our health and wellbeing deteriorates and it isn't long before this deterioration drifts inexorably towards a crisis.

Here at Age UK South Lakeland we work very hard to ensure there is a wide range of social engagement opportunities available for older people in the district. Our data clearly shows that linking a client to a social group can have as much if not more effect than many of the direct and practical interventions our client services team deliver. Loneliness and isolation can have a significantly detrimental effect on an older person's life. Age UK South Lakeland is actively engaged in providing solutions to combat loneliness and isolation, see the engagement opportunities below.



**MEN-IN-SHEDS
(and LADIES!)**

Our very successful Men-in-Sheds currently have 68 members with 60 Shedders attending at least once a month and we are delighted to have gained 8 new members during 2018 – 19.

There are a variety of items made at the “Shed”, such as toys, trikes for children, bird houses and bird tables. Shedders, their carers/partners/wives have all benefited from stimulating activities; the well documented benefits to men's health and wellbeing promoted by the fellowship and physical activity in a workshop environment have been amply demonstrated.

This year the Shed was promoted at the Westmorland County Show and Heron Corn Mill Open Day. The Shedders have been very involved in many wide ranging activities during the year:

- 15 Shedders attended two bread making courses - also held at Heron Corn Mill.
- There have been 3 sessions of inter-generational workshop activities at Grayrigg School.
- Shedders facilitated completion of DIY badges at Sedgwick Cubs.
- Two Shedders work on RSPB projects at Leighton Moss.
- Twenty four Swift nesting boxes produced for Kendal Swift Group.
- Surplus, unsellable and unsuitable tools directed to TWAM (Tools with a Mission) for projects in Africa.
- Public safety barriers constructed to Farfield Mill designs.
- 30 Bird Box kits produced for Yorkshire Dales Millennium Trust.
- 30 Bird Boxes produced for Friends on Nobles Rest environment project.
- Segway ramps and Crazy Golf equipment constructed for Leisure Centre.
- We are starting to work with Bendrigg Trust on maintenance projects.
- Recent commissions have included: music stands for Kendal big band and theatrical scenery.

And of course the Ladies now take over the shed occasionally on a Thursday morning for our very popular but oversubscribed 'Ladies in the Shed' courses. They have learned how to handle tools safely, make planters, bird boxes, coat hooks and wellie holders and even refurbished some furniture with some very impressive results!

Our Men's Walking Football teams, each attracting some 15-20 players, meet weekly to enjoy a training session and game - and to re-live their youth! These teams are based in Cartmel at the Priory School, at Milnthorpe at the Dallam School 3G pitch and Kendal and Ulverston Leisure Centres. These groups are run in partnership with the Westmorland Football Association and the GLL Leisure Group. The men enjoy the camaraderie and have even played some matches against each other as well as other walking football teams.

WALKING FOOTBALL



Walking Football is football without running and more closely resembles the five-a-side than 11-a-side game. It was invented to inspire men over 50 to get more exercise and counter social isolation; consequently thousands of older men throughout the country are rediscovering the joys of football by playing it at a more leisurely pace. There are some basic rules to the game, but essentially it is about having fun. As the name suggests, Walking Football is non-contact and anyone that sprints, runs or jogs while the ball is in play will be penalized with a free-kick awarded to the opposing team.

Our 'Auld Greys' a mixed Walking Rugby Group of 30 members meet every Wednesday at Kendal Rugby Club between 2pm and 3pm and as the name suggests, running is forbidden as is passing the ball higher than shoulder height. There are also no high tackles, or indeed any tackles and, crucially, no scrums, rucks or mauls. Instead players are allowed to hold onto the ball for no more than three seconds before passing, keeping the pace moving and giving the other team an opportunity to intercept. Walking Rugby is for anyone aged 50 and over and sessions are adapted to cater for all backgrounds and experiences of Rugby; veterans of the game are welcome as are newcomers. This is a very sociable group and they always end the session with tea or coffee in the lounge bar afterwards and often meet socially.

WALKING RUGBY



WALKING NETBALL



Walking Netball is a slower version of the game; it is netball, but at a walking pace. The game has been designed so that anyone can play it regardless of age or fitness level. From those who have dropped out of the sport they love due to serious injury, to those who believed they had hung up their netball trainers many years ago, it really is for everyone.

People all over the country have started to play the game of Walking Netball for the fun, laughter and camaraderie the social session brings, as much as the health benefits on offer. It can give those who feel isolated an outlet, provide an activity for those who don't deem themselves fit enough to run anymore and offer a stepping stone for those looking for a pathway back into netball. We run groups in Kendal and Ulverston on Tuesday afternoons in partnership with GLL and helped set up the group in Kirkby Lonsdale in partnership with Lunesdale Sports Centre. The groups have even taken part in walking netball tournaments with the Ulverston group winning the trophy!



GENTLE EXERCISE CLASSES

Our gentle chair based activities and exercises are designed to improve mobility, balance, memory and alertness. They also benefit posture and physical condition. These exercises can make a real difference to feelings of fitness and wellbeing – and they are real fun!

In 2018 - 19, the Community Action Team supported the 28 volunteers who run the sessions and, set up new classes in Flookburgh, Kendal and Natland. Eight volunteers successfully completed their exercise class leader training. An update session for all exercise volunteers took place in October, where they had a refresher session on teaching an effective exercise class, learned some Tai Chi moves to incorporate into their routines and swapped ideas and top tips with fellow leaders.

Altogether we now have 21 groups meeting weekly across the area. Every session ends with tea and biscuits, so there is time to have a chat as well. These groups provide good company and help people to keep fit, active and healthy too. All ages are welcome, but the activities are predominantly attended by the over 50's.

The very popular 'Fun Olympics' took place at Kendal Leisure Centre in June 2018. 75 Participants had the chance to take part in a variety of games such as bocchia, curling, walking netball, walking football, table tennis, board games and bingo. Medals were awarded to the winners and a sandwich lunch was enjoyed by all. Local groups and charities had information stands and free health checks were on offer. Many of our exercise volunteers and group leaders helped out at this fun event.

SNOOKER, POOL, DOMINOES & DARTS

In partnership with the Albion Snooker Club in Kendal, every Thursday we have a snooker, pool, dominoes and darts group. Although small in number, this lovely friendly group, open to both men and women enjoy meeting up, playing a few games in a friendly environment, having a catch up and putting the world to rights. It's a lot of fun, come and join us.

MEN U CAN COOK

This year we have held 2 men's cookery courses in Ings and Heversham. 12 men are hopefully now more confident in the kitchen and can prepare some simple, healthy meals which they can share with friends and family. The sessions are fun, relaxed and friendly and the men get to taste all their creations. MasterChef watch out! Look out for the next course coming soon.

During 2018 -19 Age UK South Lakeland ran 33 lunch clubs across the district. These well-loved groups are regularly attended by 788 people each month and hosted by venues consisting of restaurants, pubs and cafes. The participants are provided with a well cooked, delicious two course lunch which includes tea or coffee - all at a reasonable price.

The lunch clubs are coordinated by 36 volunteers who are in turn supported by a cluster volunteer who visit the groups a couple of times a year making sure everyone is happy and also giving an opportunity to share the work of Age UK South Lakeland.

Due to the closure of the K Village we lost one of our most popular venues. We are glad to say the group have now happily settled at the Stonecross Manor and are going from strength to strength.

LUNCH CLUBS



MINDFUL MEDITATION

Mindful meditation is a mental training practice that involves focusing our mind on our experiences and considering our own emotions, thoughts and sensations - all in the present moment. It is simply the act of paying attention to whatever we are experiencing, as we experience it. Becoming more aware of the present moment can help us enjoy the world around us more and understand ourselves better.

In our 2 six week courses in Kendal, 30 participants learned how to meditate, actively listen to music and poetry, develop a greater awareness of the body including gentle movement and breathing exercises - all in a very warm and supportive environment.

In Ulverston on a Thursday afternoon, we also run a weekly meditation for relaxation and well-being session. It's a chance once a week to switch off, contemplate our mind and learn simple techniques to calm it. These very popular weekly one-hour sessions usually involve 3 guided meditations with a break in between for tea and a catch up.

FALLS AWARENESS



Our Falls Awareness Worker and a small team of volunteer Falls Awareness Champions have continued to attend over 200 drop-ins to give talks around South Lakeland over the past year. These have ranged from flu-clinics, regular monthly library drop-ins and to village community groups such as church groups, WI's and friendship groups. In addition, the Falls Worker has also approached a number of alternative organisations to arrange talks and presentations which always include practical demonstrations of strength and balance exercises. The aim has been to communicate to a wider audience and in particular to reach individuals who may not attend community based activities and are outside the existing target audience, such as assisted living accommodation and community care organisations.

In total, 4,294 people have either attended a Falls Awareness talk or drop-in. On many occasions people have asked for extra leaflets, so that they can spread this important information to friends and family. Feedback has been extremely positive, comments have included;

"I walk a great deal more".

"I haven't fallen again since doing the exercises".

"I find the exercises have been useful in building up my muscle and improving my mobility".

Our Hearing and Tinnitus Support is volunteer led and provides a much-needed service. This year has been very busy with an increasing number of clients using the service: over 1650 recorded contacts of whom 284 were using the service for the first time, which is a 44% increase on 2017/18. Many of our clients find collecting their NHS batteries from our Finkle Street premises far easier than going to the local hospital and we also offer re-tubing and cleaning of NHS hearing aids by our trained volunteers. New users can be helped to learn about and adjust to their new devices as well as test other complementary devices.

The equipment we have on display in our Finkle Street Resource Centre can offer the opportunity to test out different phones and listening and alerting devices - helping clients find the most suitable equipment for their needs. Age UK South Lakeland does not sell the equipment but stocks the catalogues of the suppliers, who keep us informed about the latest developments.

Home visits can be offered to a limited number of clients unable to come to the drop-ins, approximately 12 cases were identified as suitable since this service was launched and 10 of these clients were visited. Where we are not the most appropriate organisation to assist, referrals can be made to organisations like HITES, who offer complementary services.

HEARING ADVICE



Following the recruitment of a very experienced volunteer during the year, support for Tinnitus has been introduced with a weekly drop-in for advice and once a month a support group now meets. This is a new venture but word is spreading and it is hoped that more people will take up the offer of this advice and support.

We expect the numbers of clients using all our Hearing and Tinnitus Support services to continue to grow as more people become aware of what is on offer after experiencing either their own or their loved ones' hearing loss.

Over 300 people attended our very successful Fit for Life events in Cartmel, Burton in Kendal, Windermere and Grange, where local groups and charities had information stands. There were also talks and demonstrations on Mindful Meditation, Benefits, Hearing Loss, Falls Prevention and participants took part in Seated Exercise Class demonstrations. Digital Champions were on hand to show the benefits of being on line with a special area set up with Amazon Fire Tablets so that people could have a go. The Physiotherapy team from Westmorland General offered functional fitness tests, which were very popular and local GP practices came along to give blood pressure checks. . . and of course there was plenty of tea and cakes!

FIT FOR LIFE EVENTS



Our Digital Engagement Project has provided direct support to over 1,000 older people by holding regular IT Drop Ins at a variety of locations across South Lakeland such as Libraries and our Age UK Offices. IT Volunteers support with queries or problems regarding laptops, tablets or Smartphones.

We provide clients with a working Amazon Fire Tablet for a three month period. If clients do not have broadband we will also provide a mobile WiFi router also for the same period.

For those unable to attend IT Drop Ins, we can provide support by way of visits from an IT volunteer in the older person's home, helping them become familiar with their own device or an Age UK South Lakeland tablet via our loan scheme.

We ran a series of training sessions, funded through Age UK and the Big Lottery and the NHS to promote the use of the internet to book GP appointments, order repeat prescriptions and to look at medical records online. We also helped people to use the NHS Choices website, which is an excellent source of information about all health matters and local services.

DIGITAL INCLUSION



In addition to these activities, we have been looking at how to use the internet to save money, particularly on energy bills and shopping online. We have built relationships with organisations, such as the Brewery Arts Centre in Kendal who, have enabled our volunteers to deliver sessions on internet security, scams, finance online and money-saving ideas as well as digital photography.

Activity	Registered Clients	Sessions	Average Attendances	Annual Attendances
Men (and Ladies!) in Sheds	68	200	9	1,800
Walking Football	114	163	16	2,608
Walking Rugby	30	50	18	900
Walking Netball	80	110	15	1,650
Gentle Exercise Class	355	1001	17	17,017
Lunch Clubs	834	360	15	5,400
Mindful Meditation	53	6	8	48
Snooker, Pool, Dominoes & Darts	13	40	9	360
Men U Can Cook	12	8	6	48
Falls Awareness	4294	199	21	4,179
Fit for Life events	311	4	77	308
Digital Inclusion	485	119	4	476

VOLUNTEERS

The value of volunteering to the individual, the charity and the community at large is much deeper, fulfilling and much more important in contributing to a healthy and vibrant community than money can ever measure.

People choose to volunteer for a variety of reasons. For some it offers the chance to give something back to the community or make a difference to the people around them. For others it provides an opportunity to feel valued and part of a team, or to share their experience and knowledge with others. Volunteering also has significant social benefits giving an opportunity to meet new people, make new friends and socialise. Regardless of the motivation, what unites volunteers is the challenge, the reward and the fun! But whatever the reason, the part they play is invaluable to the charity.

The value of volunteering to the individual, the charity and the community at large is much deeper, fulfilling and much more important in contributing to a healthy and vibrant community than money can ever measure – our volunteers are priceless!



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Volunteering is rich and diverse in Age UK South Lakeland; they are ordinary people doing extraordinary things. During this reporting period we recruited 110 new volunteers to support a wide variety of roles.

Volunteers are key in the delivery of our social engagement offer enabling older people in South Lakeland to lead a full and independent later life. As part of the recruitment process all volunteers are required to attend an induction session and, if required they are also offered further training specific to their role. They are each supported by a named member of staff from the Community, Client Services or Retail team depending on their volunteering preference.

Allotment

After another successful season and more people joining the group, the Allotment now boasts a patio for vegetable and flower planters, space for a seating bench and the introduction of some gooseberry and blackcurrant bushes. The project offers Allotmenters the chance to share in the produce grown; everyone agrees that carrots or courgettes freshly picked always taste so much better than shop bought ones. It is well-known that being outdoors or gardening on allotments improves general health, can help to reduce stress and is a very enjoyable and sociable activity. We look forward to welcoming more new members in the next growing season.



Kendal Coffee morning and Craft group

The monthly coffee mornings at Kendal Town Hall take place on the first Friday of the month and upwards of 60 people regularly attend the event. It is a chance to get out, meet up with friends, have a really nice cup of coffee or (tea) made by Barista Jan and the rest of the eight strong volunteer team. Lots of home-made cakes and produce are always available for a donation; there's rarely anything left. There is always Age UK South Lakeland information available on hand and we welcome pre-arranged guest drop-ins by partner organisations too. In March of this year the Age UK Craft group started to operate from here also offering a sociable morning of chat and craft and creativity for people who want to bring along their own crafts knitting or sewing projects.



Friends Exchange Volunteers

The Friends Exchange project aims to reduce loneliness and isolation among people over 50 who have limited social contact or support from family and friends. Evidence provided by our Compass Assessment shows that there are parts of South Lakeland where there is no provision of services for older people who need some social contact. However, one of the key limiting factors identified from many befriending services is that of overloading – the number of clients outstripping the supply of appropriate volunteers.

With this in mind, the project offers three types of support. Classic befriending is limited to those people who are housebound or find it difficult to get out and about in social groups. These clients are visited by home visiting volunteers who dedicate their time to chatting and reminiscing, making a cup of tea and providing companionship.

If we cannot provide a classic befriending service to all those clients who need it, we need to offer them something else. The service is “Bridge Building” which matches the client with an appropriate volunteer for a limited period, with the objective of promoting confidence and wellbeing and encouraging the client to re-engage with their social infrastructure, having discovered new friends and interests.

The third tier of this approach is the use of technology to promote friendships and communication. IT Friends Exchange volunteers in line with our digital offer make home visits for a period of 6 weeks to help people learn basic IT skills that helps them keep in touch with family and friends on line, thus reducing isolation. There are 47 fabulous volunteers involved in delivering this project who are committed and dedicated, many motivated to volunteer for this particular role as they have had elderly parents and relatives and cannot bear the thought that other people may be lonely in later life. Their genuine human kindness and empathy have such a positive impact on the clients they support.

In 2011 Age UK South Lakeland formed the Gateway partnership by inviting several of our third sector partners to join in collaborative working; this partnership grew from relatively small beginnings of five core members to over 57 members. The partnership had at its core the commitment to not duplicate services and to support each other and work together.

Although the decision was made during the year to close the Gateway Centre, a very special thanks must go to all the volunteers who provided regular reception duties over the five years, week in and week out to ensure the smooth running of the centre; the part these volunteers played has been absolutely invaluable and we are pleased that many of them have continued to volunteer in new or different roles within the charity.

Gateway Volunteers



Client Services

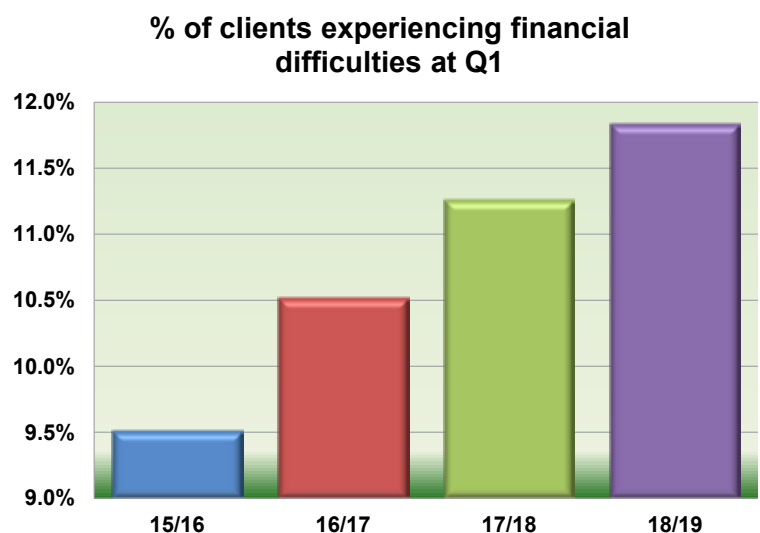
In order to maintain service delivery standards and consistency, Age UK South Lakeland remains committed to delivering its client services using the Compass methodology. The service delivery requirements in the Barrow and District area meant the team dealt with a different array of client needs than those required in the South Lakeland area. The elevated levels of deprivation in the Barrow and District area meant we had a higher level of debt, unemployment and alcohol and substance abuse issues to deal with. The average age of clients in Barrow and District area was also much younger.

The services delivered by the Compass team of officers in South Cumbria are highly regarded by our statutory partners who also use our online platform to make referrals into our services via the MARS referral system. During the year, MARS was linked to the Strata system adopted by Health and Social care. This means that surgeries and GP's can now make direct referrals into MARS from within their own systems, providing a safe and reliable referral pathway.

Understanding our clients

First and foremost, the Compass system was designed to ensure that we can properly assess our clients' needs by considering every aspect of their living experience. We achieve this by assessing each client across five domains, Locality, Health and Wellbeing, Finances, Home and Support and Social Connectedness. This means we also have a wealth of data to help us to better understand our client group, enabling us to spot trends, identify gaps in service provision and see where our services are working well or where they could be developed further.

The data analysis that follows is a small sample of the information available to us. The data set now covers four complete years; the early data generated during the development and training periods of the Compass program has been discarded to ensure accuracy. All the clients whose data is used in this analysis have provided permission for their data to be used, all data is fully anonymised. For the purposes of this analysis we have used 4,947 complete Compass data sets. A Compass data set comprises of 158 multi part questions. Therefore the analysis used 781,626 data points.



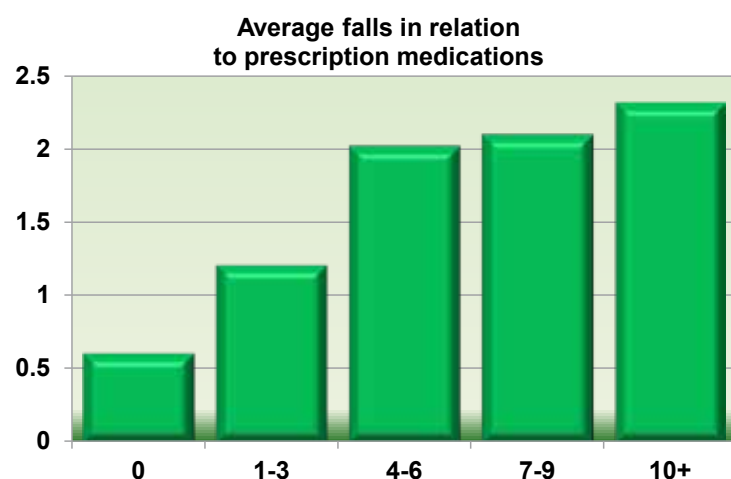
By analysing our data from the last four years we observe that the older people in South Lakeland are becoming increasingly concerned about their ability to manage on the money they have coming in. The number of clients presenting with worries around financial issues has increased year on year for the past four years.

Financial Difficulties - describes those clients who report that they cannot manage or they find it very difficult to manage on the money they have coming in.

We also observe a small increase in the average number of prescription medications our clients take. There is a great deal of research and guidance available relating to the impacts of multiple medications (Polypharmacy). Unfortunately getting older people to request a medication review is extremely difficult as many of our clients regard the doctor's prescriptions to be beyond question.

Whilst this increase in prescription medications represents only a 5.2% increase overall, the matter of concern is the general trend of increase over the past three years.

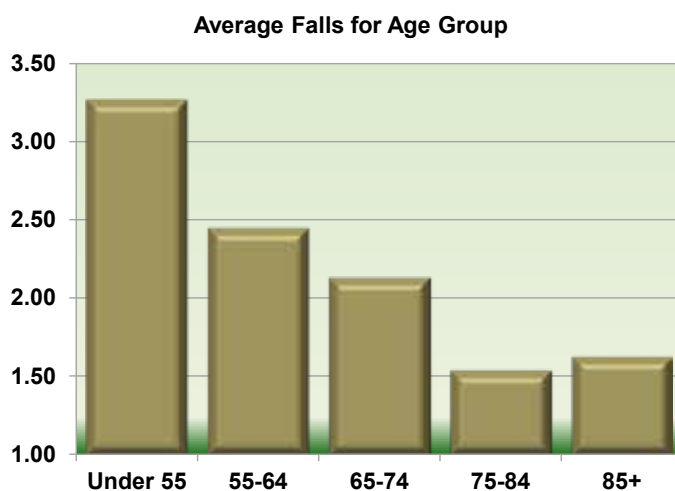
Exploring the Compass data further we have taken a look at the incidence of falls in our clients related to the number of medications they are prescribed. We are aware that there may be other factors that contribute to the outcome of this analysis, we have therefore also analysed those factors.



The incidence of falls within our Compass client group appears to significantly increase as the number of prescription medications they take increases.

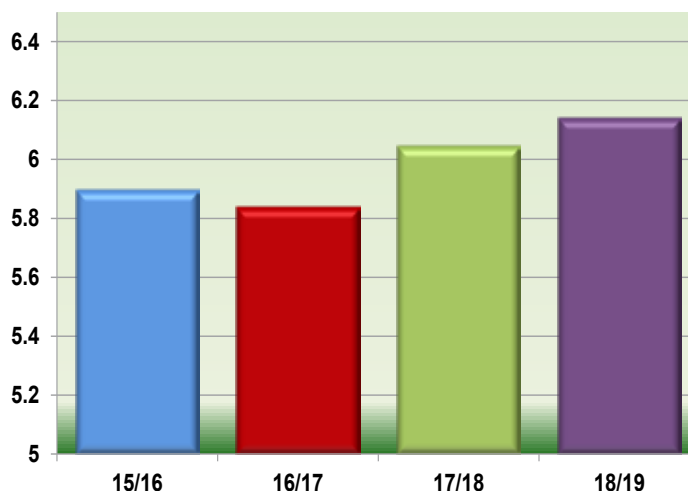
As can be seen from the chart, you are approximately four times more likely to have a fall if you take more than four prescription medications than if you do not take any. This chart is derived from an average of the data across 4,957 Compass clients.

One of the popular assumptions that is often used to explain the increase in the incidence of falls particularly in older people is, “older people fall more often”. An analysis of the incidence of falls relating to age shows the actual picture. In fact the incidence of falls drops off steadily to the age band 75 – 84; there is then a very small increase for the 85+ age band.

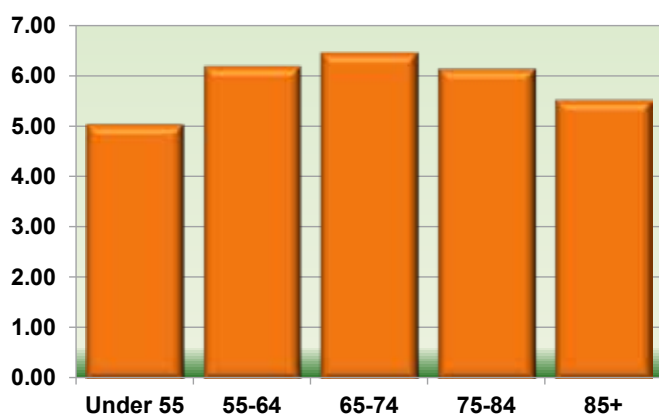


So if our data shows falls are not necessarily related to age, is it possible, in exploring the relationship between prescription medication and falls, to state that “older people take more medications”? Using the Compass data, we also explored that assumption.

Average medications taken per client

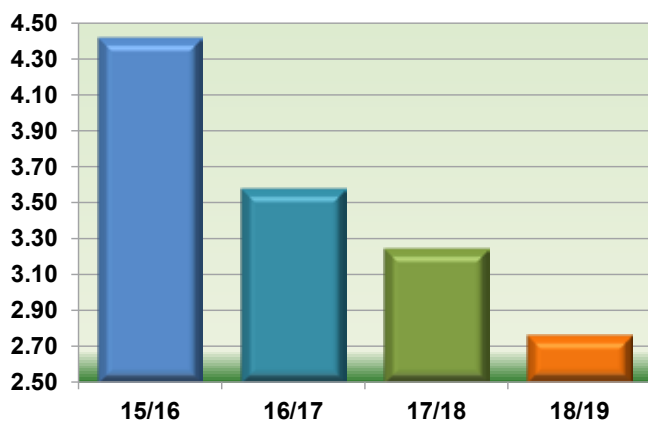


Average Medications taken by Age Group



This chart explores the relationship between fractures and prescription medications. It further explores the direct link between increased prescription medications, falls and fractures. You can see from the chart that if you take 4 – 6 prescription medications you are more than twice as likely to suffer a fracture in any given year. The previous chart demonstrating the average medications taken by each age group illustrated that our client group take more than 4 medications on average and so this data is significant for the individuals we support.

Av. GP visits per quarter, analysed by year



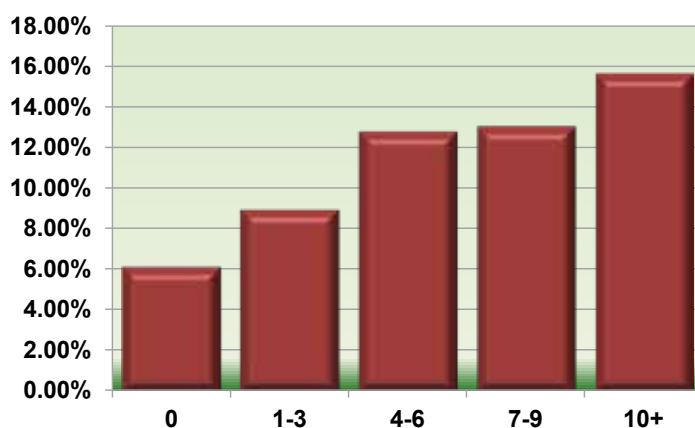
visits over the past four years, we further analysed the GP visits data looking for any variances in Rural, Urban or Semi Urban living, this did not provide any statistically relevant information. Looking further to see if there was a corresponding change in clients attending A&E or receiving treatment in their home, we found that any variances were well within statistical norms. Clients are not seeking medical support from other sources, however those other sources do not show any declining trend, they have remained relatively constant.

The wealth of data we collect whilst delivering the Compass program not only helps us to assess each client's need accurately, we can also take the big picture view and look at trends and changes over time. The Compass program collects a great deal of data relating to several key Long Term Conditions (LTC's). Those LTC's are: Diabetes, Respiratory, Angina, Stroke, Arthritis/ Osteoporosis and UTI's.

Once again the assumption is shown to be inaccurate. Whilst there is an increase in the number of prescription medications taken up to the age band 65 – 74, the number reduces for older clients.

As a result, the relationship between the number of prescription medications taken and the number of falls is not simply explained away. Both of the charts shown completely contradict the assumptions that falling more frequently is just part of growing old that we should all expect.

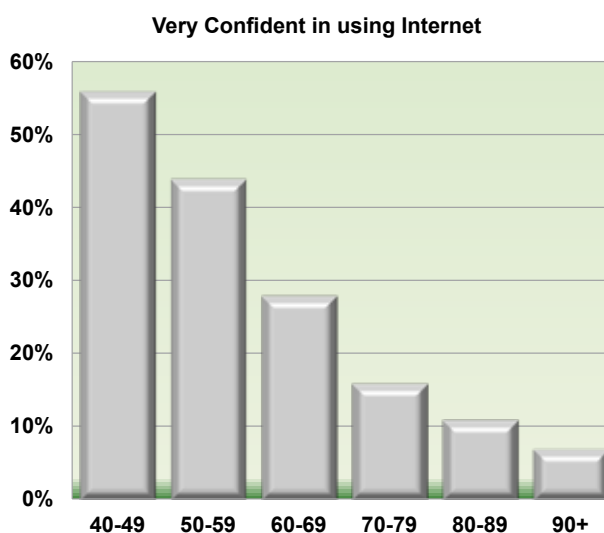
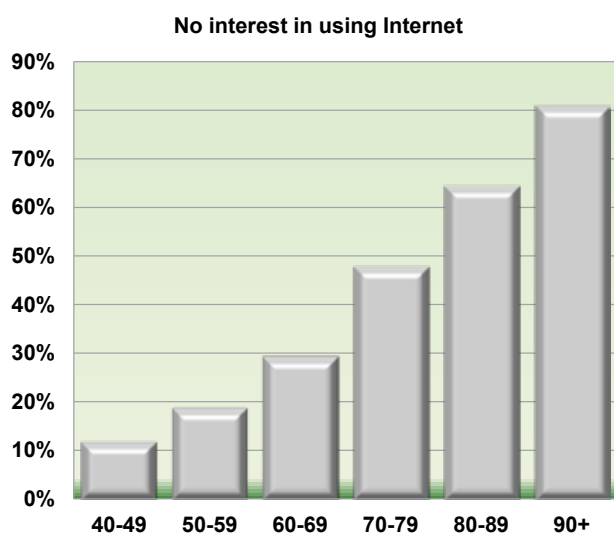
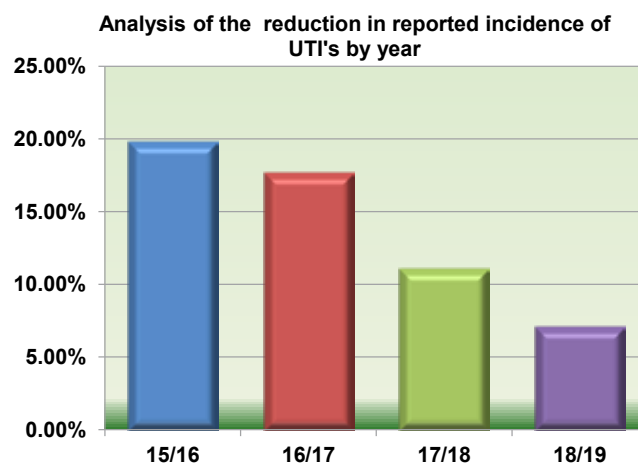
Probability of fractures in relation to prescription medications taken



In this chart we look at the frequency of GP visits in our client group. As can be seen there has been a significant reduction in the average number of GP visits in the past four years.

In order that we understand this better we have further analysed the frequency of GP visits by Age Band. That analysis showed the frequency to very closely match the Age Band and Prescription Medication analysis (See earlier chart). This was an expected result but did not shed any light on the significant drop off in GP

Our analysis shows that the incidence of Diabetes, Respiratory, Angina and Arthritis/ Osteoporosis remain within accepted statistical norms over the four years. However that is not the case for UTI's or Strokes. The chart shows a surprising reduction in reported UTI's in our client group over the four year period. Whilst UTI's are not technically a long term condition, they were included in our Compass assessment on the advice of senior clinicians as UTI's were a significant contributing factor of emergency hospital admissions. Over the four year period the reported incidence of UTI's has fallen dramatically from 19.88% in the year 15/16 to 7.16% for the year 18/19, this is a reduction of 64% over the four years. The incidence of Strokes shows a consistent decrease year on year. This results in an overall decrease in reported Strokes over the four years of 17.7%.



On a more positive note, digital inclusion is improving in South Lakeland with older people becoming regular internet users. Age UK South Lakeland has been engaged in delivering a digital inclusion program over the past few years. However whilst we would like to believe this change is solely due to our endeavours, it is more accurate to report that as every new cohort of people join the ranks of “older people”, the likelihood is that they are already more digitally aware. Our data indicates that in approximately ten years, internet usage in older people will be within 80% of the national average. This does mean however that for the next few years at least, older people will be significantly disadvantaged gaining access to many services and providers going fully online.

The potential and the range of the work of our client services is ever growing. As evidenced from the analysis above, the potential of how we can support our statutory partners, work alongside ICCs, health and social care to make a real and sustained difference to the people of South Lakeland is significant. We have started the journey and through further analysis, through greater joint working, through our compass assessment and our network of volunteers, staff and associates we can have a central role in supporting the changes that need to be made to enable better health and wellbeing of our local population.

Income Generation

The Retail environment in general and, charity retail specifically, continues to be challenging. We have seen competition increase significantly over the past few years with charities becoming more professional but also increasingly dependent on money they earn to support their work. However, regardless of the task, our Retail arm rises to each challenge and continues to proactively adapt to changes before they happen to ensure we maintain our market position.



Our 'Superstores' continue to be successful and we are also making great strides in developing and expanding our E-Trading presence and sales. Despite this, an ever present and considerable challenge remains and we therefore have to continue to be creative and innovative.

We continue to be risk-averse by trying new product lines and strategies and seeking new expansion opportunities, whilst monitoring areas where efficiency savings can be made. To continue to be one step ahead of the competitor we started an online wholesale business, selling items we would generally not sell online in bulk lots. This has proven very successful in its initial period and we plan on expanding it going forward.



Our shops continue to be brand-ambassadors for the charity, providing a social hub, and information about the charity to the public and end-users alike. The retail team, supported by committed and willing volunteers are confident that by continuing to work together, we will overcome future challenges, increase the unrestricted income to help support the older people of South Lakeland and remain ahead of the game.

2018/2019 Facts & Figures

- ◇ 171,000 customers served.
- ◇ £98,500 Gift Aid Claim. With 73% on email notification cutting down on costs and having a positive environmental impact.
- ◇ We diverted over 3500 tonnes of waste from landfill by recycling and selling saleable items.
- ◇ New goods sales increase by a massive 55% to £275,000 from £178,000 from the previous year.
- ◇ Bestselling line for year was a Patchwork Tub Armchair with over £10,000 in sales.
- ◇ Over 21,000 balls of yarn sold in the financial year.
- ◇ We sold 50,000 books to our customers and recycled over 300,000.
- ◇ Retail volunteers contributed over 22,420 hours to the shops saving the charity over £224,000 in salary.
- ◇ Over 4000 items sold online, creating on average an 85% increase in value compared to the selling price in one of our shops.



Governance

In accordance with the Charity's governing document the following Trustees who had retired by rotation, were re-elected by the Members at the Annual General Meeting held on 21 September 2018:

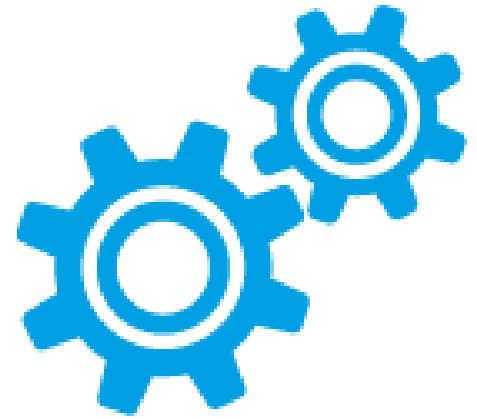
Peter Smith - had agreed to stand for re-election and to continue as Chair of the charity.

In addition the following Trustee who had been co-opted to the Board after the last annual general meeting was elected by the Members at the Annual General Meeting held on the 21st of September 2018:

Martin French - previously a volunteer of the charity who was co-opted to the board during the previous year.

Peter Smith had been elected Chairman at the Annual General Meeting held in September 2015 and re-elected in September 2018 and holds office for a second term of three years and shall not serve more than two consecutive terms of office.

In accordance with the governing document the Trustees can co-opt up to one third of their number, however during the course of the reporting period no Trustees were co-opted. During the year the Finance sub group, which reports directly to the Board of Trustees, met as required. The group consists of two Trustees and two Senior Officers and has the purpose of considering financial matters in more detail.



Investments and Finance

Sanlam Private Investments manage the organisation's investment portfolio on behalf of the Trustees. The Trustees review investment performance every six months and receive reports from the investment company every quarter. The Trustees consider that the guiding principle of the agreed investment policy is to generate funds for the Charity, but that they will not invest in a particular business in the following circumstances:

- Where such investment might conflict with the aims, objectives or activities of the Charity. For example, investment in the tobacco or alcohol industries would be inconsistent with the health and wellbeing priorities for the Charity.
- Where such investment might hamper the work of Age UK South Lakeland by alienating actual or potential financial supporters.

Funding and activity

During the financial year the principal sources of income were Trust Funds (e.g. Eric Wright and Gwyneth Forrest Trust), Big Lottery, Age UK, donations from individuals, and earned income from the sale of donated and bought in goods. There was also a minimal level of bank interest. The interest from our investments stayed within the overall portfolio value and became part of our draw-down to fund our activities. In January 2017 the charity set up a wholly-owned subsidiary to take over and develop the small amount of trading done in new goods. The subsidiary continues to remit all profits made to the parent company by gift aid.

Risk Management

The Board of Trustees is responsible for the management of risks faced by the Charity. There is a formal annual review, but risks are identified and assessed and controls established throughout the year. Key controls during 2017/18 have included:

- Formal agendas for all committee and Board activity.
- Comprehensive strategic planning, budgeting and management accounting.
- Established organisational structures and lines of reporting.
- Clear authorisation and approval levels.
- Procedures as required by law for the protection of vulnerable adults and children.

The Board of Trustees is satisfied that major risks have been identified and measures are in place to ensure that they are adequately mitigated where necessary.

Building a secure future

The Trustees maintain free reserves, which are Charity funds to be realised at short notice if required. Should the funds fall below the agreed level, immediate steps would be taken to reinstate them by cutting expenditure.

The value of the premises we own in Finkle Street, Kendal are not taken into account in calculating these reserves. The Trustees review the reserves on an annual basis and for the year 2017/18 considered £400,000 to be a reasonable holding. In reviewing the level for the year 2018/19 the Trustees take into account the following:

- Normal day-to-day fluctuations in working capital and cash flow.
- Three months of salary and rental obligations based on the 18/19 budget.
- Possible emergencies, such as cessation of trading at one of the retail units for the sale of donated goods or the loss of three months' sales for the Kendal Furniture Warehouse.

The Trustees considered £400,000 to be a reasonable amount to hold in reserves at the start of the year and the organisation's "Safeguarding the Future" policy includes specific guidance regarding reserves. When setting the budget for the year 2017/18 the Trustees agreed a reduction in overall reserves of £170,271 to keep day-to-day services going, but noted that the situation would need to be reviewed again at the half year point. The mid-point review showed that the budgeted deficit was being significantly reduced by gaining a number of new grants.

Development and induction

All new Trustees are offered the opportunity to meet with key staff in the organisation. They are given copies of Board of Trustees' minutes and papers for the past six months, the most recent Trustees' Annual Report and Accounts, and a copy of the Constitution and CC3 – The Essential Trustee (Charity Commission). In addition regular Trustee Development days are held and Trustees are encouraged to attend staff "Away Days".

Premises

In February 2005 the Trustees purchased premises at 17 Finkle Street, Kendal. The centre includes a retail outlet; an older people's resource area; offices and interview rooms for the Charity. In 2011/12 the Trustees agreed to enhance the facilities available in Kendal to provide additional office and meeting space and now lease premises at the rear of 17 Finkle Street, in a building known as Liberty House.

During the year retail trading premises were also rented in 7 locations as follows:

- Kendal Furniture Warehouse, Modgate House, Station Yard
- Windermere Shop, 20 Main Road
- Grange Superstore, Station Square
- Ulverston Shop, 19-21 New Market Street
- Ulverston Superstore, Canal Head, Oubas Hill
- Milnthorpe Shop, 39 Beetham Road
- Bowness Shop, 53 Quarry Rigg

We also rent community venues across the district for social, physical and educational activities.



Working relationships

During the year, the Trustees used the professional services of Barclays Bank, 9 Highgate, Kendal; Stables, Thompson & Briscoe (Registered Auditors), Lowther Street, Kendal and Harrison Drury (Solicitors), Bridge Mills, Stramongate, Kendal. We work closely with Age UK Brand Partner colleagues at county, regional and national levels, sharing experience and skills towards our common aims.

Statement as to disclosure of information to auditors

In so far as the Trustees are aware, there is no relevant audit information of which the Charity's auditors are unaware and they have taken all steps that ought to have been taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

Quality Monitoring

In addition to monitoring all complaints, comments and thank you's we receive, we have developed structured mechanisms for evaluating the quality and impact of our services. During 2017 /18 the Charity was successful in achieving re-accreditation of the management, governance and risk controls award ISO9001 and ISO14001 and the Information Security Management award – ISO27001. The Charity also holds the Age UK Organisational Quality Standard and the AQS Advice Quality Standard at Casework level.



Statement of Trustees' responsibilities

The Trustees (who are also directors of Age UK South Lakeland for the purpose of company law) are responsible for preparing the Annual Report and financial statements in accordance with applicable law and United Kingdom Generally Accepted Accounting Practice.

Company law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period.

In preparing these financial statements the Trustees are required to select suitable accounting policies and then apply them consistently; observe the methods and principles in the Charities SORP (Statement of Recommended Practice); make judgements and estimates that are reasonable and prudent; state whether applicable UK Accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements and prepare the financial statements on a going concern basis unless it is inappropriate to presume that the Charity will continue in operation.

The Trustees are responsible for keeping proper accounting records which disclose, with reasonable accuracy at any time, the financial position of the Charity and which enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Financial Summary

In the year to the 31st of March 2019 the charity returned an operational costs deficit of £7,574, this was in contrast to the budget set at the beginning of the year for an operational deficit of £170,271. This was in the most part due to the charity being awarded a number of grants during the year that were not budgeted for.

The balance sheet valuation for the charity shows a reduction of £176,410, this is due to the early receipt of restricted funds for services to be delivered in this year. The funds were received before the beginning of this financial year and so appeared in the previous year's balance sheet.

The financial statements were approved by the Board on 31 July 2018 and signed on its behalf by:



Peter Smith (Chairman)

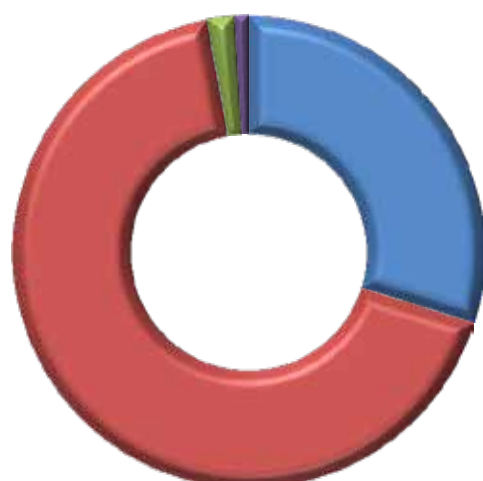


Directors' statement

The auditor has issued unqualified reports on the full annual financial statements and on the consistency of the Trustees' report with those financial statements. Their report on the full annual financial statements contained no statement under sections 498(2)a, 498(2)b, or 498(3) of the Companies Act 2006.

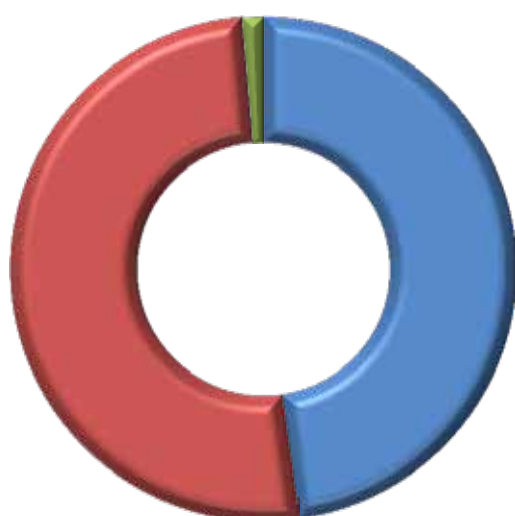


Income for the year



Charitable Activities	£617,813
Activities for generating funds	£1,396,346
Donations and legacies	£38,778
Investment income	£19,701
Total income for the year	£2,072,638

Expenditure for the year



Charitable activities	£1,078,130
Fundraising and trading costs	£1,147,993
Governance and investment management	£31,292
Total expenditure for the year	£2,257,415

On behalf of all the staff, volunteers and clients of Age UK South Lakeland we would like to thank all those who have funded our work during the year. A complete list of funders is available in our Trustees' Report and Financial Statements.

Age UK South Lakeland Limited is a registered charity number 1141415 and company limited by guarantee. Registered in England and Wales No: 7540805.

Registered Office: 17 Finkle Street, Kendal, Cumbria, LA9 4AB.

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