

Charity Member
Catch-Up &

ANNUAL REPORT



2019 - 2022



Age UK South Lakeland

About Age UK South Lakeland

Age UK South Lakeland is an independent charity which has been operating locally in the South Lakes area since 1978 and a brand partner of the national charity Age UK. Our services cover the whole of South Lakeland, and our impact locally is driven by the passion and dedication of our team of 40+ staff and 150+ volunteers, as well as our ability to raise much needed funds to sustain our work now and into the future.

Sometimes the problems we face in later life can't be tackled on our own. We provide tailored information and one-to-one advice, we advocate for local older people, and we do much more, from organising village drop-ins to setting up lunch clubs, and working with older people to ensure that they can stay living well at home.

Our purpose is to work with local older people to help them retain independence and exercise real choice in their lives.

Our Goals as a Charity

- *Delivering services that help to meet the needs of older people, whatever those needs may be.*
- *Informing and advising older people of their rights and options.*
- *Advocating for and on behalf of older people on issues which matter to them as individuals and as communities, consistently and constantly to ensure we fully understand their needs.*



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Organisational Departments

Client Services

The Client and Social Engagement (CASE) department provides holistic, confidential, independent advice and support via 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 & advice.
- Holistic assessments & Compass casework.
- Access to Third Sector services - eHub, MARS, etc.
- Social Engagement opportunities.
- Volunteer recruitment, training & support.

Shared Services

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

Those key services include:

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

Retail

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

Retail achieves this by:

- Operating 4 traditional high street shops.
- Operating 3 Superstores and a warehouse.
- Selling goods online via the eBay & BuyCharity ecommerce sites.
- Providing management oversight ensuring good practice across the retail estate.

Client Services Staffing

Full-Time Staff:	7
Part-Time Staff:	3
Total Paid Hours:	15,652
No. of Volunteers:	84
Total Volunteer Hours:	7,820

Shared Services Staffing

Full-Time Staff:	2
Part-Time Staff:	3
Total Paid Hours:	6,656
No. of Volunteers:	10
Total Volunteer Hours:	1,190

Retail Staffing

Full-Time Staff:	19
Part-Time Staff:	14
Total Paid Hours:	49,140
No. of Volunteers:	70
Total Volunteer Hours:	7,140

Foreword

It is tempting to say that the publication of this report represents a return to normal after the last two very difficult years, but the world has changed. Although the pandemic may, for now, be under control, we have rolled straight into a cost-of-living crisis, which may potentially prove just as testing for our clients.

The staff at Age UK South Lakeland responded in a quite incredible way to the challenges posed by the pandemic. It is not an exaggeration to say that the service and local leadership the staff provided during the pandemic was second to none, and thanks to the work of the senior leadership team, the staff, and the volunteers, Age UK South Lakeland weathered the storm of the pandemic. We are now a stronger organisation and we are well placed to help our clients overcome the major challenges that we all face for the foreseeable future. For all independent local charities, statutory organisations, and other care providers, that future will undoubtedly involve working together as a connected community.

Thanks to the work of our CEO, Hugh, who has developed and driven the introduction of the Compass philosophy, this organisation finds itself in a key leadership position. Of course, there are challenges, of which finding the independent funding remains the greatest. So, I cannot let this opportunity pass without saying a huge thank you to the staff and volunteers of our retail operation. Without them the challenges would be insurmountable.

I am sure you will realise as you read this report that the exceptional service provided by Age UK South Lakeland is down to the hard work, the dedication, and the professional competence of all our staff and volunteers.

It is indeed my honour to be the chairman of the trustees of Age UK South Lakeland.

Peter A Smith,
Chair of Trustees,
Age UK South Lakeland



Annual Report for April 1st 2019 - March 31st 2022

The last fully detailed Annual Report produced for Age UK South Lakeland – for the year April 2018 to the 31st of March 2019 – was completed for the AGM held in October of 2019. The charity had, during that year, gone through a period of restructuring to accommodate the effects of a decade of central government austerity budgets and its impact on the charity’s funding opportunities. The closing down of the services office in Barrow had been completed in the previous financial year but the staff remained committed to completing all of the outstanding casework on our books, as sadly, there was no other agency to refer new cases onto in Barrow. Whilst restructuring decisions are never easy, the charity came through this difficult period in remarkably good shape, due in no short measure to the dedication and commitment of all the staff and volunteers. In this introduction I will attempt to provide a brief thumbnail of the highs and lows of – what I think we would all agree – was probably the most significant period in the country’s (if not the world’s) history since 1939-1945.

So, there we were, post-Brexit, with a newly restructured charity and ready to deliver key services for our client group with staff and volunteers looking forward to the next year with positivity and optimism. Little did we know that, in just a few short months, we would be plunged into an international crisis that would test the very fabric of our society. Reports about a respiratory infection emanating from Wuhan in China first appeared on mainstream news in January 2020. Within just a few days, infections had been discovered in the UK, and within a few weeks, we were in the grips of a major international pandemic. By the end of the financial year April 2019 to March 2020, COVID-19 was with us, and its devastating potential was only beginning to be understood by the medical science fraternity around the world.

The speed and progression of events was breath-taking, from a few reports of a nasty respiratory infection to a fully formed international disaster developing in just a few weeks. By mid-March, it was clear that we were in completely uncharted territory, with the government advising the end of all non-essential contact and travel. The advice and information from central government was as good as we could reasonably expect, given the uniqueness of the situation. We were also treated to a plethora of speculation and disinformation from suspect and often unscrupulous sources. By the 23rd of March, the government announced that the first lockdown measures would come into force by the 26th, three days later.

The senior managers and trustees of Age UK South Lakeland determined that we would continue to provide what support we could safely deliver – plus whatever specific pandemic-related support that might be required. Age UK South Lakeland was relatively

unique, inasmuch as we continued to provide helpline and casework support throughout the pandemic lockdown periods. We also acted as coordinators for shopping, prescription collection, hospital visits, hearing aid batteries and other key services. We provided resources and access to online systems which allowed other volunteer groups to use our contactless payment systems and client referral systems; thereby ensuring that services were available when and where they were needed.

The pandemic brought out what can only be described as the very best in human nature and community spirit. Volunteer groups were rapidly set up and delivered much needed services and support for the vulnerable in our communities. These volunteers stood in line – often in the freezing rain – waiting for prescriptions for those who were vulnerable and self-isolating. Along with all of our direct service delivery work, Age UK South Lakeland staff and volunteers also did prescription collections and shopping trips. We supported many of the groups of volunteers by providing Helpline services and digital tools to enable these groups to operate safely and compliantly. Many of our clients needed to self-isolate due to pre-existing long-term conditions, and along with the volunteer groups, we continued to provide support for them as it was required.

The challenge the senior management team faced was not limited to how best we could support our clients and local partners through this pandemic; we also needed to consider the impact which the pandemic would have on the charity itself. A significant element of the senior management team's role is to ensure that we have a financially viable and impactful organisation to pass onto our successors when we bow out. The pandemic proved to be the biggest test the team had ever faced. For several years, one of the key strategies of the charity has been to become less dependent on grant and/or contract funding. We had seen that repeatedly, funding was being provided for key work



in the community, only for it to be withdrawn when cuts were needed in social care or health. Experience told us that social care and health would always find it easier to make cuts to budgets from external delivery programs, irrespective of the value and cost-efficient nature of the delivery. Charities are then often left with the difficulties of explaining to the beneficiary groups that the services are no longer available and having to let trained and experienced staff go. Consequently, funding from either Social Care or Health needs to be considered very carefully.

To fulfil our function as advocates for the older people of our district, our financial independence is of critical importance. The consequence of the pursuit of increased financial independence has led inevitably to the growth of our retailing operations. Age UK South Lakeland's charity retailing generates over 65% of our required operational costs. The balance of our operational costs comes from various grants, none of which are from statutory or health sources. Therefore, the news of lockdowns and what that would mean to the charity, concentrated our minds significantly on the charity's financial future. The closure of our entire retailing operation presented the senior management team with some very challenging financial issues to contend with.



The early part of 2020 was a period of frantic activity. However, if ever there was a time that the charity was needed to support the older people of the South Lakeland district, it was then, and we were not about to shirk our responsibilities. The future at that time was very uncertain for our older and more vulnerable clients; they had to deal with the new reality where, many of the council and health services they had come to rely on over the years, were no longer available. The most immediate impact on the charity was the suspension of all our social engagement opportunities. All our groups, from lunch clubs to Men-in-Sheds, had to be suspended for at least the period of lockdown. At any given period, the charity would be dealing with a large number or relatively complex and multiple-issue cases on behalf of our clients. Many of those issues would require input or actions from statutory agencies. Unfortunately, the working-from-home solutions adopted by most of our statutory and health partners proved to be inadequate. It proved to be incredibly difficult to speak to the relevant officers dealing with a specific case and the promised call-backs either never occurred or took so long to as to become irrelevant.

The biggest problem the senior management team and trustees had to deal with during this time was the uncertainty and the unknown. However, one thing we did know with absolute certainty was that if we did not find a source of income to replace the income from our retailing operations, we would very quickly burn through our reserves and the charity's very existence would be in jeopardy. The SMT embarked on a period of bid writing through most of 2020 and were successful in attracting £575,000 worth of grant

funding. Some of this funding was for specific pandemic-related projects and some was provided simply to support the core funding of the charity. The success in our grant applications was significantly higher than the national average; we achieved around a 50% success rate for grant applications. This, coupled with the easements provided by furlough support and the Retail, Hospitality & Leisure Grant Fund meant that our immediate financial crisis was dealt with. We then needed to consider the medium to longer term impacts of the pandemic on the charity's financial stability.

Age UK South Lakeland's biggest problem was that not only had retail – our most significant revenue stream – been shut down by the pandemic, but also our reserves planning for financial stability had also had a spanner thrown into the works. The pandemic had clearly impacted the value of all our investments and knocked approximately 20% off the value of the charity's investment portfolio. This was at a time when we would most likely need to draw down some of that money to tide the charity over. With such an uncertain financial future, the offer of a government guaranteed bank loan on an extremely low interest rate offered us a solution to this dilemma. We would not need to capitalise our investments whilst their value remained depressed; we could leave them untouched and use the funds made available from the bank loan should we need to. A bank loan for £250,000 was secured from Barclays Bank repayable over six years. However, because of our success in securing grant funding and the speed of the recovery of our physical retailing division, we have not needed to use any of our loan or reserves.

As the year 2020 developed, so did our understanding of how the virus was transmitted, with masks and social distancing becoming the norm. With further lockdowns occurring during the year and a daily toll of hospitalisations and deaths, 2020 proved to be an



incredibly difficult year for everyone. As 2020 drew to a close, the first green shoots of optimism began to appear, Christmas may actually happen. Towards the end of the year the first vaccines started to appear and within just a few days vaccines were being rolled out to the most vulnerable in our society. The biggest vaccine campaign in NHS history kicked off on the 8th of December 2020, as 90-year-old grandmother Margaret Keenan became the first person in the world to receive the Pfizer COVID-19 jab, immediately following its clinical approval. Unfortunately, the optimism felt by many was sadly short lived,

the data being presented daily by the now familiar TV update with the PM told us a depressing story, the pandemic was once more in the ascendance and apparently out of control, by January the 6th, we entered another national lockdown and this one was going to be a long one.

The roll out of vaccines proved to be incredibly successful, particularly in the UK, on our behalf the government had secured a supply of vaccines from all the major potential providers should their research prove successful. This meant that we could start immediately with the Pfizer-BioNTech vaccine followed very shortly afterwards



with the vaccine developed by University of Oxford and produced in volume by AstraZeneca. The resultant vaccination program in the UK was nothing short of amazing and stood the UK apart from the equivalent programs in other countries. By the time April 2021 came around, the country was re-awakening with some real belief that this may in fact be the end of this terrible Covid dominated period. The charity's retailing operations re-opened with all the social distancing policies and hand-sanitising stations in place, ready for business. A special mention should be included here for the management of our retailing operations, which not only provided online shopping payment services, but also readied all our stores for re-opening after all of the lockdown periods – thanks and well done to Mr. Garrie Hartley.

The fiscal year April 2021 to March 2022 proved to be an interesting one. Our retailing operations bounced back relatively quickly, and within just a few months, we were back to pre-COVID sales levels. The charity's online sales have not fared quite as well as the physical stores, but with work, we are confident they will also recover; this is the common experience across numerous market sectors and particularly charity sales.

Sadly, just because we had weathered an international pandemic did not mean that life would not continue to surprise us, the new owners of the Grange Superstore site gave us notice to quit the site. This was something we had been expecting, but not so quickly on the heels of the pandemic. We had been working towards finding a new alternative site and had already identified one in Grange when notice was given. The replacement store would never be as good as the current site, but we needed to replace the store as best we could. This store was made ready and opened for business as the original Grange Superstore closed. The original store had been opened with the agreement of Booths,

who had agreed for us to use the site for a relatively small rent, until the site was redeveloped. We initially expected to get one year from the agreement. However, as it worked out, we got over five years – thank you to Booths for the support the Superstore has provided over that time with over £500,000 worth of surplus funds generated.

During the year April 2020 to March 2021 the government had provided special funding for various sectors. Sadly, much of the funding did not trickle down to local charities like Age UK South Lakeland. No special funding allocations were made for April 2021 to March 2022. In total during the year 21 - 22 we managed to secure just £344,794 of grant funding, a significant reduction over the previous year, this reduction was mainly due to the reduction in application opportunities. Age UK South Lakeland took the lead with three of our Cumbrian Age UK partners in making an application to the National Lottery - Reaching Communities funding program, this grant was for support in the re-commencement of our social engagement opportunities. We were awarded £480,000 over three years, this to be split across four Age UKs (Approx. £40,000 per organisation per year).

From the clients' support perspective, access to some statutory and health services remains problematic. Many statutory and health organisations remain working from home. A direct consequence of this is that complex cases on average are taking much longer to resolve, this has a significantly negative effect on our client's wellbeing and of course on our officers' workloads.

As the Third Sector emerges from the ravages of the pandemic, there has been significant renewed interest in the CompasseHub and the development of vibrant & connected local Third Sector communities. The national version of the CompasseHub was only made live a few months before the pandemic. The charity has received funding to further develop two modules for the CompasseHub, the Volunteer Management System (VMS) and the Staff Management System (SMS). It is planned to launch the two new modules by the end of 2022.

Client Services

The period from April of 2019 to March of 2022 was the most challenging time on record for the Client Services Team. Hopefully, as we emerge out of the pandemic, we can continue to build on the lessons and challenges we have faced during this time whilst knowing that we are a stronger, more agile team, and more resilient to whatever changes may come along in the future.

At the start of 2019, the Client Services Team was larger in size, and working from two offices in Kendal and Barrow. The Case Officer's workloads were consistently high, with our client base ranging from 18 years of age to 108! The demand on our services was at an all-time high, with referrals from Statutory services flooding our available resources.

The Cumbria County Council Place-Based Prevention Pilot Programme had proved a huge success up to this point. However, the funding for this programme was not extended and - despite our best efforts to sustain our service offering for clients in Barrow - Age UK South Lakeland had to take the regrettable and difficult decision to withdraw from providing Client Services in Barrow. This was in part due to a lack of support from Age UK National and Age UK Barrow and District.

At the point of taking the decision to close, the Client Services Team at Barrow were carrying a workload of over 300 cases. The decision to close the Barrow office meant that staff were told that they would have to be made redundant. However, despite this devastating news, they continued to work tirelessly with their existing clients for the next three months to provide the best support that they could. Enquiries with other charities in the Barrow District area revealed that there were no alternative services that our continuing clients could be referred into.

Despite the Barrow office closing, we could not simply abandon those who were already receiving help and support from us. This meant that post-closure support was still provided to those open cases; the Client Services Team in Kendal picked up these clients and ensured that all of the relevant support was provided up until the point where the cases could be closed satisfactorily. This process meant that support was being provided to clients within the Barrow and District area throughout



2019 and in to 2020.

The Senior Management Team worked hard to carve a new shape for the Client Services Team following the cessation of services in Barrow. They remained dedicated to offering the Trusted Assessor and Home from Hospital extended services due to the proven need for this support. This served to reduce pressures on our Hospital Trusts and Statutory Services, despite the lack of funding to support this work.

Our dedicated team of Compass Support Officers and Case Management Officers worked with caseloads of 150+ clients each at any one time in order to try and meet the growing demand for our widely-respected holistic Compass services. During this time, plans were being made by the Senior Management Team as to how to sustain this whilst supporting the team of Officers effectively.

On the 23rd of March 2020, the challenge of managing the continued rising demand for our services was replaced with our biggest challenge yet. With the outbreak of COVID-19 and the start of the first lockdown, we had to provide effective, safe, and responsive support services to the most vulnerable older people in South Lakeland, as their support networks were effectively and immediately cut off.

Instead of responding by closing our doors - in the same way as other organisations locally - the Senior Management Team worked responsively alongside the Client Services Team to devise a package of support to fill the void left by access to many other networks being withdrawn from those in need.

Lockdown restrictions meant that the Officer's face-to-face contact with clients – which forms a vital part of our holistic support service – was no longer possible. As such, the Client Services Team found themselves in very unfamiliar and difficult territory. They were forced to try their utmost to continue providing the required support for older people whilst navigating through the fog of restrictions, which presented numerous barriers to their work.



Our Helpline remained open every day and had the daunting task of being the first point of contact for a high volume of anxious, confused and frightened older people. It

proved to be a vital service which provided clients with a friendly and reassuring voice at a time when they needed it most.

The Case Officers, meanwhile, continued in their primary roles of undertaking complex and urgent casework with clients. However, this was restricted to telephone contact only. Instead of giving up on aspects of support which were made almost impossible due to lockdown restrictions, our dedicated Officers worked hard to find solutions in order to continue supporting those most in need.

Throughout the COVID-19 lockdowns, the demand for information and advice services from clients did not diminish. The restrictions and lockdowns caused significant changes in circumstances for a large number of older people, many experiencing traumatic bereavements, and some being unable to remain at home due to their vital support mechanisms being withdrawn. During the period of lockdowns from March 2020 to April 2021, when the services provided by most other Statutory Services were still inactive or operating at greatly reduced capacity, our Officers supported 6,432 individual clients, by 16,835 points of contact, with vital information, advice, and in-depth casework.

Our Officers were also at the core of providing our Coronavirus Support Services. These included prescription collections, shopping trips, delivering hearing aid batteries, as well as jigsaw & book deliveries for older people across South Lakeland. Operating in unknown and often frightening new territory, the Officers stepped up to navigate around the hurdles we were faced with, knowing that there were many older people relying on our essential services. They did all this with the huge pressure of often being the only professionals working 'on the ground' to advocate for older people.

The Client Services Team continued to respond and adapt to lessons learnt each day of the lockdown to ensure our support met the changing needs of clients. The need to adapt our Digital Support Services quickly became apparent, and we arranged a doorstep drop-off Tablet Loan service, complemented with remote telephone support. Our Digital Inclusion Officer developed how-to guides as a remote resource to help guide older people through the use of Digital Technology, at a time when the vast majority of social contact, and even ordering essential groceries, all relied on digital technology. The need for our Digital Support Services grew rapidly as a result of our work – as did our



Befriending service. Whilst inevitably, face-to-face Home Befriending was ceased during lockdown, we were eager to ensure that the service continued to provide some much-needed social contact for isolated clients. We liaised with our cohort of Befriending volunteers, many of whom were in the vulnerable category themselves, and adapted the programme in order to provide a regular telephone befriending call to those who needed it.

The Client Services Team adapted brilliantly to the rapid change in their roles, and

working alongside our team of fantastic volunteers, delivered 442 prescriptions and made 501 shopping trips. Realising that self-isolation was difficult enough to deal with, we also knew that for those who have a hearing impairment, the loss of sound would only exacerbate an already difficult situation. We provided and delivered 3,348 hearing aid batteries to clients during this period, and we know from the feedback we received what an important service this was for many older clients. We also arranged a delivery service for books and jigsaws which became very popular among our clients.



As the first glimmers of hope arose over the horizon, Age UK South Lakeland were one of the first local organisations to restart face-to-face contact with clients in April 2021. During the restrictions, it became evident just how important personal contact was in ensuring a truly holistic support service, and our officers were delighted to be able to visit clients within their homes again, albeit with the use of various risk assessments, protective guidelines, and PPE.

Referral numbers quickly reached pre-lockdown levels, with clients presenting some extremely complex and urgent situations. It was immediately apparent that clients were in desperate need of face-to-face contact to meet their needs, and we were one of very few organisations providing such a service. The Client Services team were inundated with referrals from Statutory bodies and found that solving client issues was much more challenging than it had been pre-COVID, due to the number of organisations who had not yet restarted their services or had disbanded completely.

Before we knew it, the Senior Management Team were again faced with the problem of demand outstripping the Client Services resources. This was coupled with three members of staff going on maternity leave and the loss of a Senior Case Officer. As

such, the Client Services Team found themselves in a very difficult situation.

After much consideration, the Senior Management Team made the decision that, after years of unsuccessful attempts to work alongside Statutory Services locally as an equal partner and be recognised for the invaluable work that we undertook on their behalf, on 13th October 2021 Age UK South Lakeland would no longer accept referrals from Primary Care and Adult Social Care sources. This was largely due to unsustainable pressures on the Client Services Team. Whilst this was a very disappointing decision to make, the Client Services Team were now able to better manage the number of referrals reaching them, and be confident that they had the appropriate resources to effectively support the client base. Statutory Services would thereafter be responsible for sourcing alternative support as appropriate for their own clients.

As a result of Maternity Leave and the natural loss of two officers, the Client Services Team found themselves greatly depleted in staff. Moreover, the Senior Management Team was struggling to recruit new officers without compromising the high standards required to maintain the delivery of quality services for older people. However, the remaining officers worked to ensure that our usual standard of Compass service delivery was provided.

After a few frustrating months, recruitment was finally successful, and moving into March 2022 with two new Case Officers in post and a Social Engagement Officer also joining the team, the Client Services office is once again a hive of activity. Although it is once again a newly-formed team, with the support of the Client Services Manager, the new Client Services Officers continue to develop their knowledge and experience. Importantly, our standards for service delivery continue to remain high. Spirits have



been raised amongst the team as the Officers are beginning to be able to refer clients back into our Social Engagement Programme once again, which has been very well received by our clients as a sense of normality finally resumes.

As we reflect on a turbulent three years, the Client Services Team continues to develop and respond to local client needs effectively. The restrictions during the periods of lockdown reminded us of the irreplaceable value that our services offer older people locally. We are proud to

acknowledge that, in undertaking a Home Visit to every older person we support, we are able to assess a wide range of factors which are often not previously identified by the clients themselves, and which have a marked affect on their lived experience. This, coupled with the powerful tool of our Compass Assessment, enables us to assess and analyse client situations thoroughly to enable planning of effective action plans, helping us to address the issues and risks threatening their independence and wellbeing.

As a team, we look forward to supporting the re-development of the social engagement programme over the coming months, including the expansion of our Digital Support and Befriending services once again. With our newly-appointed Officers continuing to grow in experience, knowledge, and confidence, we are looking forward to possibly re-commencing work with Statutory partners by accepting their referrals once more in the near future. The Client Services Manager is also working with the team to adapt to the changing landscape of Welfare Benefits and focusing on appropriate training to ensure that our information and advice is always current, accurate, and accountable.

With so many challenges successfully overcome, the Client Services Team moves forward into the new financial year with hope, optimism, and enthusiasm.

CompassHub & Partnership Working

Over the last three years, CompassHub has evolved from a platform that was predominantly being used across South Cumbria and parts of North Yorkshire into a site that is available to any not-for-profit organisation in any part of the country.

At the beginning of 2019, interest in Compass was already starting to gain momentum in the west of Cumbria. Whilst a small number of organisations in that part of the county had already engaged with Compass, it was in the summer of 2019 when interest in the platform and the modules it was able to provide began to increase significantly. Compass adopters during this period ran the gamut of charity service providers, from women’s health charities through to organisations providing support for young LGBTQ+ communities. All recognised the benefits of the Compass system and saw how it could help them to professionalise their activities.

Between August and October of 2019, a significant amount of work was completed with a number of organisations across the Copeland and Allerdale districts. This resulted in many signing up to use the Compass platform. This work also resulted in the identification of an Area Administrator for the district - a young peoples' charity called ‘Always Another Way’. As this work was being progressed in West Cumbria, we also began to get similar enquiries from organisations across the Carlisle and Eden districts. We facilitated a number of meetings and training sessions which likewise resulted in many organisations registering on Compass. There are now 59 organisations registered to deliver services across West Cumbria alone on Compass, and more than 60 organisations registered in the Carlisle & Eden districts.

As we moved into 2020, we started to receive enquiries in relation to Compass from further afield. Recognising the growing interest in Compass from different parts of the country, we started to consider how we could develop the platform and enhance it so that it would be fit for purpose as a national system.

At the same time we were also being asked to deliver training to organisations in neighbouring Lancashire, as organisations in the county were becoming aware of Compass through their contact with



registered organisations in Cumbria and North Yorkshire. This work culminated in the identification of another Area Administrator - Community Futures - who took on this role for Central Lancashire. It was at this time that we also had some discussions with Lancashire CVS who had also expressed an interest in becoming an Area Administrator for the County. However, it became clear quite early on in these discussions that Lancashire CVS were only prepared to take on this role should they be able to attract funding to do so.

When working with organisations and looking at potential Area Administrators, we have always taken the position that it is important for any organisation taking on this role to be an ambassador for Compass, and for them to be fully committed to its principles and ethos. Any caveat that this role has to be linked with funding requirements raises some concerns, as this builds in an element of vulnerability. This is because such conditions mean that with the ending of any such funding comes the potential for a group of organisations to be left without that local support provided through the Area Administrator structure. Because of this, discussions with Lancashire CVS regarding the Area Administrator role did not progress.

By March 2020, we were now starting to receive enquiries from organisations in Manchester, the South East, and Scotland. It was at this point that we started work in earnest to develop Compasshub into a national platform that would be able to manage Third Sector organisations of any shape and size in any part of the country.

However, as we all know, on the 26th of March 2020, we entered the first national lockdown as a result of the COVID-19 pandemic. As has already been discussed in this annual report, Age UK South Lakeland took the decision that we would continue to



provide support to the older people of the district in any way we could. In addition to this, it quickly emerged that there was specific pandemic-related help needed over and above the usual support we were able to provide. This included support such as shopping, collection of prescriptions and provision of services to help people who were isolated and confined to their homes.

Within 48 hours, we were able to utilise the flexibility and versatility of the CompassHub to put a full support infrastructure in place. This enabled us to support the delivery of

these pandemic-related services, including the recording of requests for support and cashless payment processes for shopping. This was especially important, because whilst the pandemic brought out much of the best in society, it also saw vulnerable people exploited by less scrupulous individuals and older people were at particular risk in this regard. The pandemic saw many well-meaning groups setting up to support those who needed shopping, etc., but practices such as the handing over of debit/credit cards or cash quickly started to appear, with all of the inherent dangers that this brought.



Through Compass, we were able to implement a process where this could be avoided. When someone contacted us to request support with shopping, a case would be opened, and a list of shopping items required was obtained from the client. This was then allocated to a Case Officer or volunteer who would then go and buy the relevant items utilising a ‘cash float’ system.

When the shopping was delivered to the supported client, no money changed hands. Instead, they were given a unique reference number to make payment over the phone. Through Compass, the client was then contacted and able to use the unique code that they had been given to verify who was calling, allowing for payment to then be taken securely.

Compass was also used to record and manage requests for the collection of prescriptions, provision of books and jigsaws to help with isolation issues, and the provision of vital items such as hearing aid batteries.

Not only was Compass used internally by Age UK South Lakeland for this process, but we also opened the platform up to other organisations who were delivering similar support. We registered a number of small volunteer groups and charities who all utilised the Compass COVID processes to provide support in relation to shopping and prescription collection. The organisations supported during this time included Light Up Lives, Kirkby Lonsdale Meals on Wheels, Kendal and District Lions, and Milnthorpe Volunteers.

All of this was done through the use of the MARS (Multi Agency Referral System) module of the Compass platform. When a request was made for shopping or collection of a prescription, a MARS referral would be created and sent to the relevant group or organisation, who would then accept the referral and complete the task. In the case of shopping, once it had been delivered, a MARS referral would be sent from the completing group to a payments officer at Age UK South Lakeland who would then arrange for collection of payment from the supported individual.

Throughout this period of lockdown, we were able to complete 501 shopping trips, collect 442 prescriptions, and deliver 3,348 hearing aid batteries. We also received 5,138 calls for support through the use of Compasshub, and recovered 100% of the money paid out in relation to shopping trips.

Whilst this first period of lockdown focussed all of our minds on supporting those who were most vulnerable, the development of the Compass platform also continued during this period. We implemented a number of enhancements to the existing system and continued to develop the national site. As the first lockdown came to an end in May 2020, we concentrated on finalising the national site format, which was ready for its nation-wide launch in July of 2020. This involved the wholesale replacement of the previous version of the website with the new one and left us holding our breath on the 31st of July 2020, when the switchover occurred.

Fortunately, this process went smoothly, and allowed us then to accelerate our discussions with other organisations around the country who had previously shown an interest in the Compass system. We began by registering organisations in Manchester, Brighton, Cambridge and Glasgow, whilst also continuing rollout to organisations in Lancashire.



Of course, in November 2020, the second national lockdown was announced. Due to the preparations and the infrastructure we had put in place during the first lockdown, Compass allowed us to immediately implement the contingency processes as required. This second lockdown did not see the same level of demand for pandemic-based services, but we were able to deal with every challenge that emerged effectively for the month that the lockdown was in place. This was followed by the third

lockdown in January 2021, during which we were again able to use Compass to manage support needed by those affected by the restrictions.

Early in 2021, we were contacted by a consortium of veteran's charities, covering East Yorkshire and the North-East. This group was led by an organisation called The Goodwin Trust. These organisations were looking for a full case-management system to support their ongoing work with veterans, and over a period of four months, we delivered a number of awareness and training sessions to various charities such as Hull for Heroes, Sporting Force, and Veteran's Woodcraft.



The result of this work is that we now have a group of Veteran's charities registered on Compass, all using the case management functionality, as well as the other modules. These organisations have brought a new perspective to the site and have made a number of helpful suggestions to enhance the platform.

One of the benefits of Compass to registered organisations is that they can play an active part in its development by suggesting enhancements and improvements. If it is decided that any such suggestions have a universal benefit, then we can consider implementing them, and there have been several instances where this has occurred during the ongoing development of the site. One example of this was when the veteran's charities asked for some extra information to be included in the Client Record. This information related to military service, which initially appeared to be bespoke to veteran's charities only. However, on further examination, it became clear that information about someone's military history was often useful to a much wider audience than just those charities specialising in veteran support. For instance, access to funding can sometimes be linked to an element of veteran support.

For this reason, it was agreed to implement these suggestions, and by working with the Armed Forces Covenant Fund, we were able to include a comprehensive list of information that would be useful to collect on the Client Record going forward.

We continued to develop the new national site of Compass throughout 2021, and in April, we registered the 250th organisation onto the platform. Due to the increased

amount of data being recorded on Compass, it was necessary in 2021 to consider increasing the capacity of the server which hosts the platform. The server at that time was rapidly approaching capacity following the launch of the national site, so it was decided in September of 2021 to transfer the hosting of the site to a cloud-based server. This transfer helped to future-proof the platform as more and more organisations registered and began to store data of their own.

During this reporting period we have also continued to support Pioneer Projects, which is the Area Administrator for Compass in Craven. Pioneer Projects was an early adopter of Compass, and as the Area Administrator, has registered over 100 organisations in the Craven area. However, many of these organisations which have registered on the platform have only signed up to the open-access modules. As such, there is a real push in Craven for the use of the system to be expanded by the registered organisations, especially in respect to the Multi Agency Referral System (MARS). Over the last twelve months we have provided several intensive training sessions to the staff at Pioneer Projects aimed at equipping them with the knowledge to support organisations and increase their use of the platform.

It was also during 2021 that we started to explore the possibility of obtaining Open Referral UK accreditation for CompassHub. The Open Referral UK data standard is a consistent way of recording and sharing information about services. Currently in the UK, most organisations in the public sector (such as local authorities, as well as health, housing and voluntary organisations) have a form of directory that is used to store and list local services. In each locality, directory content is often duplicated across the public sector. Open Referral UK defines a standard structure to meet this need for a consistent way of gathering and using data.



At the same time, we were also approached by North Yorkshire County Council. The council wished to explore the possibility of the information we held on Compass being made available for organisations in North Yorkshire by sharing it on their North Yorkshire Connect site.

As we developed these two projects hand-in-hand, North Yorkshire County Council funded the development of the Application Programming Interface (API) with Compass, allowing them to access the required

information. At the same time, we began work with the Open Referral UK team to start the process of accreditation. We also created a number of enhancements to the platform to ensure that organisations could opt in or out of the data exchange with North Yorkshire County Council if they wished. This work is continuing beyond the period of this Annual Report and is expected to be completed during the next reporting year.

CompassHub continues to evolve and grow. The development of the platform into a national system has already brought a number of opportunities to further enhance its functionality. For example, this has included enhancements such as additional security for Case details, with the ability now to restrict the details of a case down to an individual case officer.

In March 2022, we also began to develop two new modules for the Compass site. These are a facilities/HR module and a Volunteer Management module. These are both modules that we have wanted to develop for some time and they represent a further step forward in terms of the support and functionality that we would like to be able to offer organisations. Thanks to our success in attracting funding for this work, we are now able to progress this work in the near future. The volunteer module, in particular, is something that many registered organisations have been enquiring about for some time. Once completed, this module will represent a real opportunity to attract even more organisations on to the site.

In recent months, interest in Compass has accelerated, and we are receiving more and more enquiries as the weeks and months go by. Numerous awareness and training sessions have been completed with organisations in Cumbria, North Yorkshire and Lancashire, as well as in Manchester, Glasgow, Coventry, East Yorkshire and Northumbria.

During the next reporting year, it is anticipated that there will be some major developments for CompassHub. Currently, there are a little under 300 organisations registered on the site, and this number is expected to increase significantly over the next twelve months. Not only are the numbers of organisations expected to increase, but we also expect to see a wider spread of organisations registering on Compass across other parts of the country. This will necessarily require us to expand our existing network of Area Administrators.

In addition, we will also see the completion of the HR and Volunteer Management modules and we would also hope to attain the Open Referral accreditation in the next reporting period.

Volunteering & Social Engagement

Here at Age UK South Lakeland, we have always worked hard to ensure that there are a wide range of social engagement opportunities available for our clients. During 2019 and prior to the pandemic, we were running 44 lunch clubs per month, 26 Gentle Exercise groups, and a wide range of other social events. We recorded a total of 34,794 annual attendances for some 6,649 registered clients during 2019 alone. However, the speed with which the pandemic and the subsequent lockdown hit us on the 23rd of March 2020 resulted in the immediate cessation of all of our social engagement work. Shutting down such a large number of clubs and events was no small task.

We immediately contacted all of the venues across the district to inform them that we were - in line with the rest of the country - cancelling our groups, and that we could not consider restarting any until we were sure that it would be safe for our older clients to re-engage. At this stage, we had no idea what timeframe we would be looking at.

We also embarked on the huge task of contacting many hundreds of clients and volunteers to explain the decisions that had been taken. Fortunately, with the help of our volunteer group leaders, venue administrators, and Admin Team, this was done with speed and compassion, reassuring the members that we would continue to re-assess the situation as time went on, with the hope that we could restart activities as soon as possible. Little did we know that restarting most of our groups would not happen until the autumn of 2021, or even into the spring of 2022.

Our wonderful volunteers were invaluable during this period, and we would like to say a huge thank you to everybody who gave up their time to help Age UK South Lakeland at this time. We had volunteers answering the phones in Finkle Street to take shopping lists, and many others who braved the weather to stand in long queues and pick up prescriptions for self-isolating clients. Many volunteers also delivered food and medication to doorsteps and had quick, socially-distanced chats with isolated clients, helping to check that they were safe and well.

During the early days of the first lockdown, other volunteers swapped roles and joined the dedicated team of volunteer telephone



befrienders, enabling us to reach out to an ever-increasing number of lonely and frightened clients. For those clients who were able to access digital services, some volunteers set up online exercise classes to take the place of those in-person classes which had been cancelled.

Towards the end of summer and the start of autumn 2020, as lockdown restrictions began to ease for the first time, we began to receive an increasing number of daily calls from clients, asking us to restart our social engagement groups. However, we had taken the exceedingly difficult decision not to restart any of our groups until we considered it safe to do so, and the state of COVID-19 at that time meant that we were not yet able to restart groups safely. However, this certainly highlighted just how much our clients craved the normalcy, social interaction, and face-to-face contact that they had lost during lockdown.

As we headed towards the late summer of 2021, with restrictions easing further and the vaccination programme well underway, we started to investigate the slow re-opening of a small nucleus of our Gentle Exercise groups. This decision was made despite the fact that our Admin Team was now much smaller than pre-COVID. As such, our former Group Leaders were contacted and asked if they wished to restart their pre-pandemic classes.

Unsurprisingly, due to the prolonged period of closure, some of our Leaders had made the decision to retire, moved on to different roles, or found new jobs and interests which prevented them from restarting in their roles with Age UK South Lakeland. However, a small group of Leaders did agree to return, and we started to contact the many venues which we had used pre-pandemic. We were able to plan the slow reopening of a small number of classes, on a one-a-week basis, with the intention to gradually restart more over the following months.



As the pandemic had resulted in the total closure of our social engagement groups for over 18 months, it was necessary to arrange for all of our Gentle Exercise Leaders to attend refresher course training before any of the classes could commence. Although many people were excited at the prospect of classes starting up again, there was still much that had to be considered regarding COVID risks; whether those involved had been vaccinated, what the rules were for each individual community hall with regards

usage and cleaning, and so on. This only added to the already huge administrative task which lay ahead.

It is at this point that we should extend a huge thank you to our small but trusty group of Exercise Class Leaders. Their hard work, dedication, and support for both the charity and one another has been invaluable in getting classes up and running again. Currently, we have a dedicated group of clients who regularly attend 12 Gentle Exercise classes across the district. Our exercise Leaders have taken on more than one class each at times, covered classes when their colleagues have been ill or away on holiday, and done an excellent job to ensure that classes are consistently provided for our clients.



Around the end of 2021, after receiving many requests for further social engagements, we decided to embark on the reintroduction of our Lunch Clubs, and the team set about contacting the venues which had previously supported them. This was, again, a gradual process of contacting both the venues, to see if they were willing to welcome us back, and former Lunch Club Co-ordinators who had previously managed a lunch club, to see whether they were still willing or able to continue.

Unfortunately, due to the conditions post-pandemic, some of the former venues did not feel able to continue hosting lunches for us any longer. Some venues had changed hands, while others had sadly closed their business. However, we saw this as an opportunity to look at potential new venues and were delighted when several were only too happy to support a lunch club. To date, we now have 25 lunch clubs up and running across the district: a testament to the hard work and efforts of our Admin team.

Over this period we were, however, saddened to hear of the passing of two of our long-standing lunch club co-ordinators – Anne Darley, who led the Grange Lunch Club, and June Peckston, who led the lunch at Kirkby Lonsdale, both of whom offered many years of service to Age UK South Lakeland.

We are pleased to report that, in their usual quiet manner and without any fuss, our Men in Sheds group have gradually re-opened their shed doors. A phased opening has allowed the group time to give the premises a thorough clean, as it was used during

the pandemic as emergency storage by our Warehouse staff. It was initially necessary to limit the number of clients who could return to the group to allow for social distancing. However, we are now happy to report that the shed is back to its original hours and has a waiting list of potential clients. Throughout the lockdowns, the Shedders continued with projects but undertook their work in their own sheds at home, keeping in touch with each other by producing a newsletter. They are now back and helping to restore items for the Warehouse, as well as helping in the community by tackling projects such as a mud kitchen for Old Hutton School, and repairs to a door for Stricklandgate House.



It was also around this time that we were able to restart our Walking Football and Walking Netball groups at the Kendal Leisure Centre. These groups have since gone from strength to strength, with new members joining on a regular basis.

To date, we are lucky enough to have 215 volunteers on our books, with 22 new volunteers currently going through the application process. Moving forward, our newly appointed Social Engagement Officer will be commencing work on our new social engagement project, Re-Connecting Cumbria: funded by The National Lottery for three years and working in partnership with three other local Age UKs across Cumbria, Reconnecting Cumbria is a major initiative to provide further groups and events to reconnect local older people with their communities.



We will continue working with the successful formula already in place for lunch clubs, with an aim to finding new venues which can host clubs with a larger number of attendees. Pricing has had to be a consideration, however, given the rise in costs for both clients and operators, and we suspect that the coming months will be a challenge for many of our venues and groups. The process of engaging with former clients and identifying new ones will continue, as we find that some older people are still nervous about leaving their homes and mixing socially. The continuation of partnership working

and engagement at community events, such as sheltered housing coffee mornings and established neighbourhood groups, will also be key to promoting the work of Age UK South Lakeland in the coming months.

Volunteer recruitment continues to be challenging post-COVID, and we are exploring new methods of engaging prospective volunteers, as this is key to the continuation and proposed expansion of our social engagement programme. We are also looking for new, innovative ideas to engage a wider cross-section of our client base with our social engagement offering, and we are positive that we will be successful in this endeavour.

Retail

Age UK South Lakeland's retail branch currently consists of three high street shops, one larger furniture store, two superstores, one warehouse, and our E-trading building at Busher Walk. Within our seven retail locations, we not only sell donated goods, but we also sell new goods. Throughout our shops we have 31 staff members, a lot of our staff work within the same shops but we also have relief retail supervisors who work within all of our shops and Super stores to cover our other retail staff for annual leave and sickness. We also wouldn't be able to keep our busy and growing shops and Super Stores open if it weren't for our 74 volunteers that we have helping within the retail side of the organisation, the volunteers not only help organising the donations that we have coming through the door each day they also help serving customers and being the faces that our customers see on a day to day basis in the shops.

Retail performance was positive from the start of April 2019, through the Autumn/Winter 2019 period, and into the start of 2020, with total takings of £1,332,289. Unfortunately, the COVID-19 pandemic had a severe impact on trading in the early months of 2020, prior to the first national lockdown. Both sales and customer footfall decreased rapidly as the pandemic spread. On the 23rd of March, 2020, we received notification from the government of the first national lockdown; all of our shops would have to shut down with only essential businesses able to continue operation.

While the first lockdown occurred, retail played its part in the delivery of support to the older people of South Lakeland. As detailed further in its own section, the CompassHub platform was used to record and manage requests for shopping items from vulnerable people who were isolated at home. A referral process was set up via the Multi Agency Referral System (MARS) so that referrals for shopping could be recorded and handled by the retail team. To ensure proper accounting and reassure clients, these referrals included unique reference numbers that were given to each client when their shopping had been delivered to them. The Retail Area Manager would then contact each client by telephone and quote them their reference number and the exact cost of their shopping. This gave the clients the confidence that the telephone call was genuine and that it would be safe for them to make payment over the phone. During



this period, retail processed over 500 shopping bills with 100% of bills being paid.

In March of 2020, the government announced the pandemic furlough scheme, providing governmental funding for 80% of staff member's wages. Fortunately, thanks to decisions made by the senior management team and trustees, Age UK South Lakeland was able to guarantee staff their full normal wages, allowing the retail side of the charity to retain all of our staff members throughout the period of lockdown.

It wasn't until the middle of June that we received the all-clear to reopen our shops. While this did allow us to get the shops back up and running, it wasn't without its challenges, as we returned to very tight pandemic restrictions. These included a 2-metre social distancing rule and a maximum of 5-6 people allowed in a shop at any one time. Customers would also be required to wear masks (providing they were not exempt) and we also had to provide hand sanitiser stations at each location.

The greatest difficulty the retail department faced, however, were the restrictions that had been put in place regarding donations. If an item was donated to one of our shops, that item could not be touched until after a 5-day period had elapsed. The result of this was that several of our shops reached the limit of their storage capacity for donations very quickly, as their limited stores filled up. Furthermore, donations piled up in shops soon became a health and safety risk, as most of our shops are small with no extra storage space. This situation meant that we had no choice but to stop accepting donations for a small time to allow the retail staff to try and sort through the backlog of donations as best they could.

However, despite these challenges, the retail shops bounced back rapidly following the end of lockdown. In the first month after reopening the shops took £29,617 in sales.



While retail was reopening shops across South Lakeland, we were also busy locating a new premises for our Superstore in Grange-Over-Sands. In the end, we were very lucky to find a new premises which was very close to the old location, minimising any disruption to our regular customers. We finally shut the doors of the first Grange Superstore at the end of September 2020 and formally reopened at the new premises soon after, at the beginning of October.

Post-lockdown, we also made the decision not to reopen the smaller of our two charity shops in Ulverston. Lockdown proved an opportunity to move everything from this location across to the larger Ulverston Superstore, which would thereafter become our sole location in Ulverston.

With the start of winter in 2020 came a new wave of the pandemic and the second national lockdown, resulting in our shops closing once again until early 2021. As our retail shops had been forcibly shut for the majority of the financial year, sales were - of course far lower for this financial year at only £642,316.



Once we were permitted to reopen again in 2021, we were greeted by a tidal wave of donations. This time, however, we did not have to quarantine donated items for five days and were able to get them sorted for sale straight away. However, while this did make life much easier for our staff members coming out of the second lockdown, we found that we had lost a large number of our volunteers. Between the extended period of retail shutdown, an understandable wariness to be back out in public, and a small number of volunteers who had sadly passed away, many of our volunteers from pre-COVID did not return in 2021. This problem was further exacerbated by the third and final lockdown later in 2021 which took a further toll on our staff and volunteers.

Post-pandemic, the decline in the numbers of our active retail volunteers is something which we are still working to recover from. We have found that, even after more than a year since the last lockdown, that many people still struggle with the thought of having to come into contact with strangers in a retail environment. Although we have taken on new volunteers in the last year, it will take time to rebuild our volunteering contingent to its pre-pandemic levels.

The use of Gift Aid, which provides a substantial financial boon to the charity when applied to customer donations (including both donated goods and financial donations), has also fallen significantly following the COVID-19 lockdowns. Although we have made strides in raising awareness and use of Gift Aid, its use has still not recovered as much as we would like. As such, we are still working hard to push Gift Aid, informing more of our customers about what Gift Aid is and how it helps us as an organisation, and helping customers to sign up for Gift Aid at our checkouts.

Since the start of 2022, we have undergone a number of refitting and development projects for our existing retail shops. The new owners of the Beales in Kendal, for example, kindly offered us our pick of their old equipment and fixtures in early 2022, which enabled us to refit two of our shops. Moreover, we were able to sell those items which we didn't use to generate additional proceeds for the charity.

In the coming weeks and months, we will be fitting a new till system fitted within all of our shops, which we hope will be a major improvement over our existing till system. Certainly, the new system which we are planning to fit should allow for better tracking of our daily takings and back office record-keeping.



Looking ahead to the the latter half of 2022 and beyond, the retail branch will be focused on looking and pushing for new volunteers that are willing to spare some time to help within our shops when they can. This push will include volunteer recruitment initiatives, such as setting up stalls within libraries and at local events, as well as in-shop and online awareness-raising.

E-Trading

At Age UK South Lakeland, we had always recognised the potential of trading online. We have had an E-Trading team for many years, comprising a Supervisor and four Listing Officers covering 3.5 FTE (full-time equivalent) posts, who were originally based at the warehouse in Station Road, Kendal. This space is a small area in which we had to accommodate the staff, as well as storage space for items being offered online. However, it became clear as E-Trading activity increased that the team was rapidly outgrowing these premises.

In 2020, we took the decision to look for alternative premises, not only to house the E-Trading team but also to provide the charity with more appropriate warehousing space. In December of that year, we took on the lease for the premises based at The Old Printworks at Busher Walk, Kendal. This was a large warehouse building spread over two floors with the potential to create office space for the E-Trading team and also provide a significant area of warehouse space. It was located in a good position, allowing for the ease of stock movement across the retail estate.

Between December 2020 and April 2021, work was completed on the building to make it fit for purpose. A large office space was created on the first floor to house the E-Trading team. Racking was also installed across the rest of the top floor to provide storage for all of the items being sold online. The ground floor provided a large open warehouse space that could be utilised by the charity to store and distribute new goods between the shops and also provide for the storage of items for recycling.

In April 2021, Busher Walk became operational with E-Trading moving across from Station Road into their new offices. This gave the team a far better environment in which to operate and manage the increasing activity in relation to online sales. In terms of online sales, throughout this reporting period, E-Trading have generated a significant level of income. In the financial year of 2019/20, total sales were £117,093.

In common with the rest of the organisation, the financial year 2022/21 provided E-Trading with a number of challenges due to the pandemic and periods



of national lockdown. During the lockdown periods, E-Trading continued to service any orders received. However, the posting of new items for sale ceased during the lockdown periods. This was due to the fact that the physical stores had been forced to close their doors and items for E-Trading to list online are supplied by these stores. With none of the shops open, there were no items being identified as suitable for selling online. Members of the public were also unable or prevented from being able to make any donations, which also reduced the supply of suitable items for listing. Despite these challenges during this financial year, sales from E-Trading totalled £103,010.

The financial year 2021/22 represents the first full year that E-Trading has been operating out of Busher Walk. Buying habits of the public are taking some time to return to pre-pandemic levels. Many of the charities that are involved in any sort of online selling are typically reporting a decrease in sales of around 30% on pre-pandemic levels.

There are a number of other factors that are also compounding these issues. Huge increases in postage and packing costs impacts heavily on the income that can be generated from online sales. Likewise, the cost of packing materials, etc., has also increased significantly. However, the team at E-trading have worked hard to restore our online sales. They have worked closely with the retail staff operating the physical shops to identify good-quality items that are most likely to sell online, and commenced the task of increasing the number of items that were listed. This resulted in total sales for 2021/22 topping £144,000; a significant increase of pre-pandemic sales. However, alongside these sales, there was also a substantial increase in expenditure, primarily due to the additional costs of the new building.



BuyCharity

their own financial difficulties and were very unlikely to view working with and supporting the Third Sector as a priority for some time to come. We resolved that we needed to be the architects of our own salvation by being creative and innovative. The development of a charity-only online shopping site was seen to be an opportunity to better engage with the public to generate the unrestricted income that we urgently

Prior to the pandemic, we had also started to consider the possibility of developing a charity-only online shopping site. As the impact of COVID-19 grew, it was clear that we were going to be facing a challenging financial future. However, waiting for Statutory agencies or Health to provide grants or contracts to provide a solution was not going to be a viable option. Statutory organisations were dealing with

needed.

The development of BuyCharity offered just such an opportunity, providing a unique online Charity Shopping experience. As a charity running a number of retail stores, we recognised that a major reason for our customers frequenting our shops, browsing, and buying from us was to support our charity and, of course, to pick up a bargain. Selling online using the established platforms also used by traders, companies and the general public meant that our charitable status and identity was getting diluted or lost completely and the potential support, goodwill and feel-good factor had the potential to be wasted.

COVID-19 introduced many more of our supporters to online shopping. However, in common with all charities, our charity online sales still lag far behind general online sales by a considerable margin. However, as a charity, we enjoy a great deal of public support and loyalty. By tapping into the very heart of “Charity Shopping”, we believed that BuyCharity could provide us with the opportunity to convert that support and goodwill into a substantial and sustainable revenue-generating stream.

Throughout 2020, we developed the BuyCharity site and also identified a small number of charities who were enthusiastic about the project and were willing to form a beta-testing group. In March 2021, we had a ‘soft launch’ of the site involving this group. By October 2021, the beta testing phase had come to an end, and we then began to invite other charities to register and sell on the site. By the end of March 2022, we had ten charities registered on the site and a further three in the process of completing their registration.

The E-Trading team at Age UK South Lakeland have been real champions of the BuyCharity site, developing good practice as well as feeding in to the continual development of the website. They have listed in excess of 2,500 items for sale.

During the next reporting period, there are some real challenges facing our E-Trading team. For instance, they will be continuing to develop the science behind what to list for sale online. By identifying what type of items are likely to sell and what sort of price is being paid, they aim to become more informed so that the best items are offered to our online customers. In addition, they will continue to try to increase the level of sales in order to generate as much income for the charity as possible.

In relation to BuyCharity, it is intended to now accelerate our recruitment of further charities as sellers onto the site. This has been challenging over the last year, as many charities are still focussing on their post-pandemic recovery, but it is hoped that they will

now be starting to consider more innovative ways of generating income and that BuyCharity will be able to provide this for them. It is important that we continue this work, as we hope that BuyCharity will eventually also contribute to Age UK South Lakeland as an income-generating initiative, through a business model of charging contribution rates on sales.

The pandemic has definitely had an effect on peoples' buying habits, with many more having now experienced online shopping, perhaps for the first time. This is something that E-Trading will be looking to capitalise on in the coming year.



Financial Summary

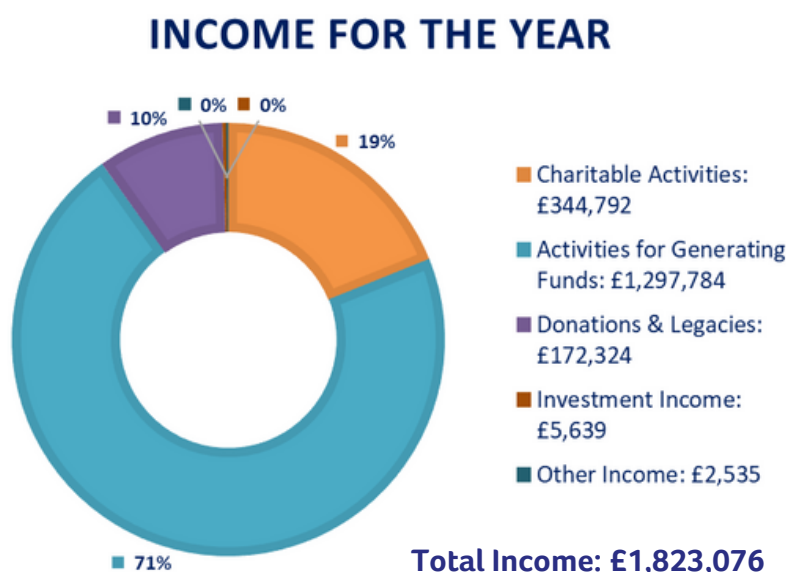
The period from April of 2019 to March of 2022 was one of the most challenging in the past decade for Age UK South Lakeland. However, despite that being the case, the Charity continued to deliver its full range of services as best it could during this period.

The financial accounts for the period of April 2019 to March 2020 showed a deficit of £126,643. Of this deficit, £51,018 related to the fall in value of Sanlam investments due to the Coronavirus, while the remaining £58,523 was due to the depreciation of assets. Operationally, Age UK South Lakeland continued to manage its costs in line with the fall in grant funding.

The period from April 2020 to March 2021 continued to be very challenging and uncertain. The ability to generate funding via our retail outlets was severely affected by the period of COVID-19 lockdowns and the resultant shop closures. Of course, the charity still had fixed costs to pay for offices and shops, as well as staff salaries during this extended period. As such, the focus was set on identifying and securing grants that were made available to charities during the pandemic as a source of replacement funding. Fortunately, between the grant income we were successfully in acquiring and support from furlough payments, we were able to secure £559,219 worth of grants. This meant that the charity could face the future uncertainties in reasonable shape. All of the charity staff received 100% of their salaries during the period of lockdown, even though we could recover only 80% from HMRC via the furlough scheme provided.

The financial accounts for the period of April 2020 to March 2021 showed a surplus of £334,325. This was achieved with the help of the grants we secured, an increase in the value of investments by £85,979, and a significant reduction of operations expenditure during the year totalling £308,800.

During the year we also secured a Barclays Coronavirus Business Interruption Loan on a very low interest rate. As a result, we would not need to capitalise our investments whilst the value of them remained depressed; we could



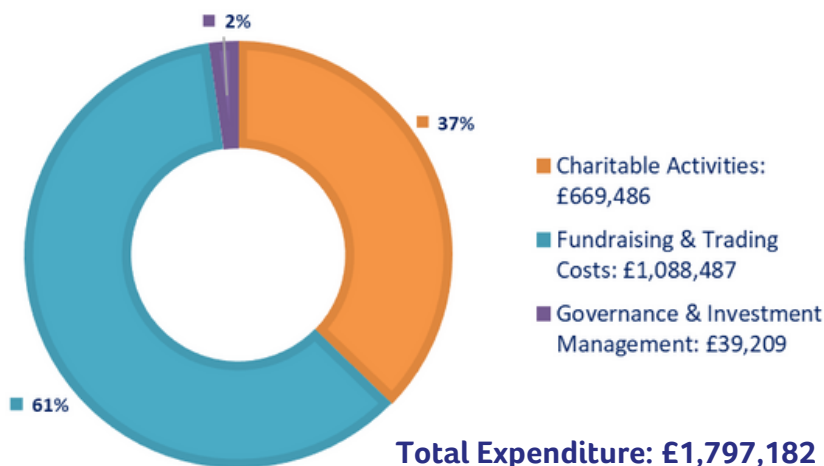
instead leave them untouched and use the funds made available from the bank loan should we need to. This bank loan was for a total of £250,000 repayable over six years. However, because of our success in securing grant funding and the speed of the recovery of our physical retailing division, we did not need to use any of this loan or the charity's reserves.

However, despite this relative success, the financial period from April of 2021 to March 2022 continued to be quite challenging for the charity. The aftermath of COVID-19 coupled with the emerging conflict in Ukraine presented new financial hurdles. In total during the year we were able to secure just £344,794 of grant funding. This was a significant reduction over the previous year, mainly due to the reduction in application opportunities across the sector.

Despite this reduction, the financial accounts for the period of April 2021 to March 2022 still showed a surplus of £24,618. However, this was nonetheless a significant reduction to the previous year's surplus of £334,325. This reduction was primarily due to our ability to secure more grant funding during the year being hampered by grant availability. The total value of secured grants decreased by £214,425. Despite this, Age UK South Lakeland still had a very strong cashflow position at this time. As a group, we held funds totalling £1,429,858 of assets, and free reserves had increased in the year by £24,613, giving us a total of £231,528.

The financial statements for the period up to March 2022 were approved by the Board on the 31st of August 2022. On behalf of all 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.

EXPENDITURE FOR THE YEAR



Conclusion & Acknowledgements

In conclusion, we would like to extend our heartfelt thanks to all of the wonderful staff and volunteers whose work has helped to bring Age UK South Lakeland through the last three years, as well as all of our cherished donors and supporters. We are deeply proud that the charity has such a dedicated and broad coalition of support, and that through that support, we have together weathered some of the most difficult conditions in recent memory without stumbling.

As we look ahead to the future, we have high hopes for our new social engagement initiatives such as Reconnecting Cumbria, and are already seeing positive post-pandemic growth within our retail & E-trading branches. Compass, meanwhile, continues to go from strength to strength; with over 300 organisations now registered we are excited to continue expanding the platform further across the UK. Indeed, we are even now working with County Durham to bring more than 100 new organisations onboard in the coming months! Overall, we believe that we are now in a strong position as a charity to continue our work providing vital aid and services to - and advocating for - older people in South Lakeland.

Thank you once again to all of our amazing staff, volunteers, trustees, members, donors and other supporters - we appreciate everything that each one of you has done to support Age UK South Lakeland in the last three years!

We hope that you will continue to support us in the many years to come.

Contact Us

Helpline 030 300 30003

Tel. 01539 728118

Twitter @AgeUKSouthLakes

Email www.ageuk.org.uk/southlakeland.com



Superstore & donation centre

Age UK South Lakeland is passionate that everyone should have the opportunity to be able to make the most of later life, no matter their circumstances, wants, and needs.

To find out more about our services, charity shops, or community events, don't hesitate to get in touch!

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Free donation collection