

Annual Report

Improving later life in Stockport
2011-2012



The full trustees report on finance and governance and the full annual accounts are available from the registered office.

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Introduction

Welcome to the Age UK Stockport 2012 Annual Report. At the end of March 2011 the organisation was on the cusp of becoming Age UK Stockport, a new incorporated charity taking over from the venerable Age Concern Stockport that has served locally for 27+ years.

Much has happened in the 12 months to the end of March 2012. Like others, the organisation has had to find ways to respond to both a significant reduction in funding and many external challenges. This has meant some really tough decisions and many internal changes, including staff redundancies in order to protect the quality and quantity of front line services, at a time when demand and need is actually increasing.

There have however been many successes following an extensive organisational restructure. The new Age UK branded local organisation has come through its first year of operation in different but good shape and as committed to its aims and values as ever. Importantly, clients have not been affected by the turbulence that the charity has encountered.

We hope you enjoy this annual report on the positive changes that have been accomplished and particularly the positive outcomes that have been achieved on behalf of local older people during the year.

Derek Caldwell, Chair of Trustees
Margaret Brade, Chief Executive Officer



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Service delivery

Comprehensive internal involvement enabled significant changes in back room support and in delivery structures through new Wayfinder and Wellbeing teams.

These generic teams replaced the previous project structure to maximise staff time, reduce duplication and increase internal efficiency.

It has also improved the quality of a person's journey with Age UK Stockport, through focus on delivery from the start.



61,179

Number of clients supported by Age UK Stockport in the year.

£1.5m

Sum of additional benefits claimed by clients through Age UK Stockport.

99%

Our clients feel 'better informed' and supported after our help.

Challenge to opportunity

The restructure was originally planned around improving client experience, through streamlining delivery, and was given additional impetus through the need to make financial savings without loss of quantity. This has been achieved and surpassed with an increase in numbers and quality. Particularly the number of complex cases increased by 71% over the year to over 12,700. This increase in complexity and activity has been keenly felt by the organisation now operating at full stretch.

Value for money

The organisation had significant cuts to deal with, so doing things differently was the best possible response. The report demonstrates that the new structure and approach enabled an increase in numbers, case work and actions, plus improvement in client outcomes; all achieved despite fewer staff, visits and telephone calls. This has provided clear benefits for the organisation, clients and funders and the wider public.

Team benefits

The generic team had effective training to maximise and spread the benefits of the experience and special understanding Age UK Stockport workers have for older people and their situations. Important issues such as Accident Prevention, Home Safety, Hospital Discharge and Safeguarding have been well protected by becoming part of the generic team training and approach.

12,551

People Supported by the Wayfinder Team during the year.

5,235

Extended or complex support given by the Wayfinder team.

14%

Of people supported were from Priority 1 areas.

The Wayfinder Team

Wayfinder Team was named to describe its function, providing a gateway service to a wide range of support, services and activities. Wayfinder is all about the person and their individual situation, and about responding to people with none of the old project boundaries; just supporting each person to find their way to what they need for their health, wellbeing and independence.

The Wayfinder Team offers information, choices and options in relation to a range of services, which may be from Age UK Stockport or other external organisations. Each person is then given as much or as little support and encouragement as they require to consider their options and action their choices.

The Wayfinder service, developed from the success of the previous award winning Wellcheck service, has increased the efficiency with which the organisation can support clients. It is focused on delivery from the start through experienced multi-skilled workers providing a faster more efficient, high quality service.

Wayfinder delivers through both a public office and community delivery to ensure client choice of access

Wayfinder public

The Wayfinder public office is available for callers by phone, email or in person. Located on Lower Hillgate, next to the Pop In, it provides an easily accessible location for any and all queries with advisors specialised in understanding and dealing with issues affecting people in later life. This includes benefits, financial matters, consumer issues, legal matters, wills and probate and much more. They also provide top quality Age UK information resources on a whole range of subjects and specialist surgeries on relevant issues.

28,097

Home Visits by Wayfinder workers.

61,000+

Actions by Wayfinder workers including 54 Safeguarding issues identified and supported.



Wayfinder Community

The Wayfinder Community Team is available to older people and carers across Stockport through events, activities, and most often through a home visit. Referrals can come from a variety of sources including self-referral. The team also visits referred patients in hospital to enable timely practical and emotional support on discharge. Each person is linked to a named worker from the team who will support them throughout their contact with the organisation.

Wayfinder will work in a broad range of areas, bringing in specialist support as required. This includes issues such as housing and transport options, practical help in the home, mobility issues and other ways of maintaining or increasing independence; and issues to support general health and wellbeing such as increasing personal and home safety, reducing the likelihood of accidents and how to keep finances safe. The team also covers areas such as overcoming emotional issues, reducing isolation, carers support and increasing social engagement. Basically, clients are helped to find the support they need, whether it is help to arrange a holiday, have the confidence to walk to the shops, get their dog walked or just have a quick chat every now and then.

15,823

Shopping calls and 5,668 orders processed.

4,067

Counselling sessions delivered to 353 people.

4,502

Contacts by telephone or in person for Befriending.



Wellbeing Team

The Wellbeing Team delivers a range of support with a specialist focus. This is sometimes short term, but often over a medium or even longer term.

Practical support

This covers many things that people want or need including Handy Help and Gardening, Telecare, various assistance with shopping and pension collection, support with Money Management and a range of support in relation to digital inclusion services such as IT taster sessions and group lessons.

Supporting you

This is about support in any way it is needed. For example through counselling, health checks, and tackling social isolation through befriending and social rehabilitation such as walking or stair practice to accompanying people out.

Personal support

Access to long term care through placement from hospital, advice and support gives essential support to the older person, their family and carers at difficult times.

Social support

Social support through a range activities from groups to individual volunteering; also positive day services increasingly including activities in the community for example walking, singing and gardening.

Carers support

Supporting carers through Carers Support and Take a Break.

General support

Includes a wide range of activities through social centres and events, community activities.

Client Focus – team approach

The Wellbeing services will deliver flexible services required by each individual. Although Wayfinder is the main entry point into the organisation, people can also directly access or refer to any of the specific Wellbeing services. Equally, referrals may be made from the Wellbeing Team to the Wayfinder Team if a more generic visit is required.

Mrs A was admitted to hospital very confused having suffered a stroke. Her daughter approached Age UK Stockport for support. With encouragement and a successful benefits check, Mrs A agreed to physical changes to the house from tradesmen and Handy Help to enable her to wash and to feel more confident in her home. She was also supported to access daily personal support, Sensory Loss Team, and Take a Break Carers Support for the daughter. As Mrs A gained in confidence, she was supported to access social activities. The daughter recently confirmed that everything was in place and working well and her mother is enjoying the singing group.

Mr B is recently bereaved and lives alone. He got into some serious financial issues whilst supporting his wife when ill and, feeling ashamed, had gradually become isolated. Counselling helped him deal with this and a Manage your Money volunteer helped him to face up to and deal with the financial issues. A successful benefits check helped him regain his sense of control and at the right time he was supported to engage in some social groups of interest. The client reports that 'it is truly unbelievable how much better I feel'.

6,216

Handy Help and Gardening jobs.

5,244

Home Safety Checks.

2,250+

People assisted from Hospital.

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Supporting delivery

A lot happens behind the scenes to ensure effective, efficient and quality delivery and streamlining this was a major part of the restructure.

Quality and flexibility of delivery to respond directly to clients are major parts of the business plan.

Good governance including risk management and internal policy controls ensures effective delivery on our objectives, values and key aims.



£445K

The approx. value of 180 volunteers time.

0

The number of non-conformities in our ISO/FSA quality assessments.

3,500+

Free newsletters distributed each quarter.

Behind the scenes there is a lot of work done to maintain an efficient organisation, positive representation of older people and effective service delivery. This is achieved through ensuring commitment to our mission of ‘working locally for positive choices in later life’ and working in accordance with our values of being ‘focused, responsive, experienced, caring, fair and positive.’

Age UK Stockport is an independent local charity that cares about local people’s life experiences as they get older. Our stated aims 2011 to 2013 are:

- To positively involve and engage with local people, communities and stakeholders to ensure added value and continuous improvement in all we do.
- To provide accessible and quality services responsive to present and future needs of local people.
- To provide individuals with information, advice and support to enable choices about the quality of their own lives.
- To maintain and develop strong community and strategic partnerships to represent, influence and improve opportunities for people in later life.
- To manage and develop the organisation to be effective, financially secure, and fit for purpose; including ensuring that quality is the responsibility of everyone, throughout the organisation.

ISOs

ISO 9001 and ISO 14001 Quality standards achieved in March 12.

IIP/IIV

Investor in People and Investors in Volunteers Quality awards.

FSA

FSA regulated trading successfully reviewed and maintained.

Volunteering

Age UK Stockport's volunteers' time, knowledge and commitment are essential to supporting many local older people. Around 180 volunteers support the organisation in a variety of roles. The value of this is shown in the highlights but in fact goes way beyond finances. Working in the back office or out in the community, our volunteers help to magnify the effectiveness of the organisation through their effort supporting local older people.

Age UK fundraising and trading

Age UK Stockport offers a range of services for older people and delivery beyond available charitable funding and development needs a constant flow of independent income. This is achieved through a balance of traditional fundraising and trading activities. Age UK Stockport's trading activities work in a FSA regulated environment and provide nationally backed products specifically designed for older people such as General Insurance and Financial Services. Further information is available in our general products leaflet.

Representing and engagement

A number of local and national campaigns have been supported, sometimes linking in with brand partner Age UK. Supporting older people to be heard is another important aspect of the wider work. A number of community groups were supported to work locally and a particular focus in the year was supporting the establishment of an Older People's Forum which quickly grew to 100+ people and started to identify and tackle real issues. A whole raft of work is also undertaken through roles such as the FILL (Facilitating Life & Lifestyles) to ensure older people are considered in the development of local strategies and developments.



10+

Campaigns supported including Human Rights, Hospital Nutrition.

1,300+

People involved in consultation and involvement events.

2,700+

Positive feedback comments received.

Quality

The organisation has worked hard to ensure quality at all levels through new policies and customer service standards and through submitting itself to externally assessed and accredited quality marks as indicated in the highlights. Further commitment to Information Governance standards were under development at the end of the year.

Quality is also about the Chief Executive and senior team who led the changes, the staff who worked with the organisation through a year of turbulence, and the trustees who established the new local organisation and supported the changes. As the first year of the new organisation came to an end in March 2012, considerable thanks were due to all involved for the success achieved in difficult circumstances and for giving the charity a chance to continue doing its good work for Stockport.

Over the year, more than 99.5% of comments received were very positive, such as the following. 'I feel so much more confident knowing you are there and I can contact any time - just keep doing what you do - it's also the way that you do it -first class organisation that really 'get's' older people and carers and our issues - friendly and caring yet efficient and professional - marvellous thank you.'

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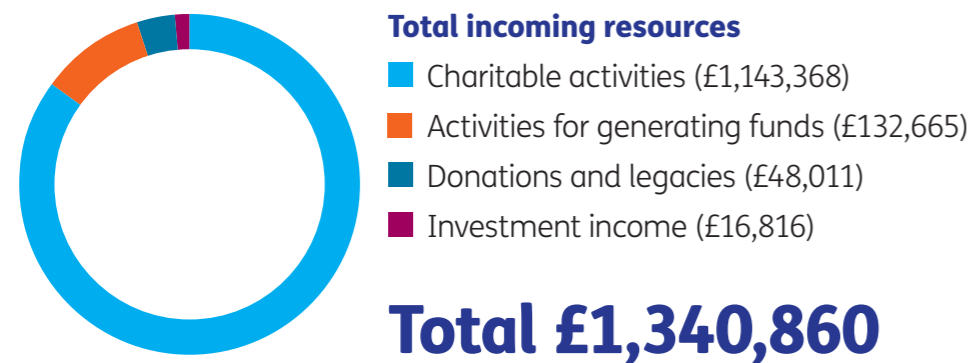


Financial review

Protecting the charities main objectives of delivering services was achieved through the restructure, 92% of income was applied to charitable expenditure.

A deficit on charitable activities of £62,098 was turned into an overall surplus by the charity's trading and other activities.

Comprehensive reviews and risk management ensured low governance costs, clear designated funds and strong reserves.



Income and Expenditure

Income reduced by 22% from the previous year through Council cuts and loss of project funding; and the level of donations, legacies and investment income declined reflecting the economic situation. This was mitigated to 19% through a one-year Cabinet Office Transition grant.

The deficit on charitable activities of £62,098 was more than covered by work streams undertaken to raise independent funds, particularly trading. Trading income was at a high of £95,750 enabling an overall positive effect. Maintaining independent activities and income remains a vital part of the business strategy

The organisation works to maintain sound financial and risk management as a key factor in keeping the organisation grounded for future sustainability and also to assist in bringing in funding applications from external agencies.

The restructure reduced expenditure mainly by redundancies to match the reduced income. However, charitable expenditure at 93% demonstrates the level of work in pursuing the charity's objectives of providing services and public benefit.

The back office infrastructure was a main focus for costs savings as part of protecting effective front line services, so investment was made in a new monitoring system and improved intranet to ensure meaningful communication could be maintained at lower cost.

The level of reserves has been reduced to reflect the overall reduction but maintained at the six months level. Designation of funds supports the trustees' assessment of the major risks, with a clear commitment to service delivery for local older people.

