

Annual Report 2013–14

Working locally for positive
choices in later life



Introduction

Our key commitments remain unchanged: our vision is for communities where older people are involved, valued and in control of their own lives; our mission to work locally for positive choices in later life; our work is supported by our core values of being in all respects Focused and Responsive to the people we support, Experienced and Positive to ensure quality services and Caring and Fair in all we do.

The last twelve months has been a lot about starting new partnerships and ways of working, having to find and develop new places to work from as we encountered various property issues, and the build up to launching a new associated company to provide day services from April 2014, Step Out Stockport. It has also seen continued commitment to quality through the success of a number of externally assessed and nationally and internationally recognised quality standards.

A now more mature brand partnership with the national organisation Age UK has remained positive and the new Love Later Life strap line reflects the work locally. The partnership has enabled the organisation to benefit from being part of a larger and nationally recognised brand whilst remaining strongly committed to its roots as a local and independent Stockport charity.

Thanks are due to all involved: the senior management team and all the staff who always work with a genuine commitment to service delivery and outcomes for individual clients. Volunteers continue to give generously of their time and energy to many areas of work within the organisation and the directors and trustees continue to govern with considerable experience and dedication.

The organisation is aware that even more significant changes will be required to survive the economic challenges in the external environment and to respond positively to commissioners changing requirements. The focus remains on working to ensure that local older people continue to get support when needed and that the quality of a person's journey with Age UK Stockport remains overwhelmingly positive, as evidenced daily through client feedback.

Derek Caldwell, Chair of Trustees

Margaret J Brade, Chief Executive Officer



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47,903
LOCAL PEOPLE
SUPPORTED BY
US THIS YEAR



‘As an organisation you blew me away! Everyone and the service have been excellent – I couldn’t have done it without you – yet now I feel I can go forward on my own.’

Client focus – team approach

The Age UK Stockport teams deliver a wide range of practical, personal, emotional and social support to local older people and their carers. The Wayfinder team and the Wellbeing team together provide a range of support to help people stay well, safe and independent. Every situation and person is dealt with flexibly and through a holistic and respectful approach to ensure individually focused delivery.

In an average week there were over 1,000 phone calls in or out and around 360 home visits made in addition to the many hours of work done at the offices.

Wayfinder - Prevention and Proactive Support

The Wayfinder Team is the entry point to the organisation delivering immediate support from first contact; with a proactive focus on preventing people, including those with long term conditions, from needing more primary and secondary health and social care services than necessary. It was also named to describe its additional function of providing a gateway to a wide range of further support. This may be through the Wayfinder team, the services of the Wellbeing team or external to Age UK Stockport as best suits the person’s needs and wishes. Each person is given as much or as little support and encouragement as they require to consider their options and to action their choices.

Staff training was maintained throughout the year to ensure the workers build on their experience to be multi-skilled on relevant issues to older people, such as safeguarding, falls, social isolation and more. During the year there were 10,234 referrals of which nearly half, 4,780 were complex casework support, 15 Safeguarding cases reported and well over £1million benefits claimed.

Wayfinder community

The community team consists of experienced workers who deliver support across the Borough. They undertake visits to people usually in their own home or other community settings as required by the individual person. Each person is linked to a named worker who will support them throughout their contact with the organisation.

Wayfinder public

The public office is available to callers by phone, email or in person where there are experienced advisors specialised in understanding and dealing with the full range of issues affecting people in later life. They also provide quality Age UK information resources on a wide range of issues and specialist surgeries for practical assistance. It was a difficult year as a safety issue with Russell Morley House offices meant an unexpected evacuation in December 2013, a temporary location in Commonweal for a few months and an eventual relocation in May 2014 to new premises at Unit 34 Great Underbank in Mersey Way Shopping Centre.

Wayfinder Stepping Hill Hospital

A key part of this team is based at the Hospital, visiting referred patients, providing timely practical and emotional support on discharge, and access to any needed longer term or specialist support. Skilled and experienced staff assisted 3,086 people in a variety of ways helping them to settle home well and safely. Importantly most cases also demonstrate the effectiveness of this service in helping people to avoid unnecessary readmissions.



Easy Shop made **12,610** calls and processed **6,256** orders.

Wellbeing team

The team delivers support with a specialist focus, often working closely with the key worker from the Wayfinder Team, and dealt with 6,370 referrals in the year. The support is sometimes short term, but often over medium or longer term. Wellbeing is delivered through focus in a number of key areas:

Practical support

A range of practical help is focused on assisting people to live independently in their own home for as long as possible. This includes Handy Help, Gardening, Shopping, Pension collection, Money Management and Digital Inclusion. Support can range from a one off Handy Help job such as fixing a broken lock to delivery of financial advice over a few weeks to a long term shopping or pension collection service providing weekly support.

Easy Shop made 12,610 calls and processed 6,256 orders.

Pension and Personal shop 1,642 calls of which 72 were vital one off emergency calls.

Handy Help and Gardening jobs and advice totalled 5,485 and an additional 2,537 Home Safety

Supporting You

Supporting You provides a range of services to support people to reduce isolation, increase confidence and increase emotional and physical health, all with the focus of keeping people away from needing more health or social care interventions for as long as reasonable. This applies as much to people already dealing with long term conditions as to those dealing with the more general issues of later life. Support is individually tailored and as much or as little is provided as required to enable people to meet their goals and live as independently as possible.

Tackling and reducing Social Isolation was a particular focus for the year. The range and capacity of activities were increased and led to 19,025 personal and telephone contacts. This included individual assistance to people who needed support to enable them to engage with activities in their community. For example timely counselling, emotional support, mobility and walking practice and confidence building to help the person get past barriers for independence. It also included regular face to face or telephone befriending service for people who are housebound. Delivery included:

Befriending Services 5,483

Mobility support to over 873 people

Counselling sessions 3,132 with 348 new referrals

Health Check 168 people assisted

Emotional support 3,646

Personal support and placement

The Placement Service provides specialist and experienced information, advice and support to people, their families or carers, already in or considering long term care. Around 175 people were assisted in the year with 125 actual placements and the service was preparing to return to focusing on Hospital Discharge following the success of a tender for 2014.

Social support

Social support delivers a variety of opportunities from group activities to individual support to reengage with social and other activities. For example, the Out

and About Service provides a great selection of social groups and activities such as singing groups, friendship groups, pub lunches; 741 Tai Chi sessions were provided in various venues and the Travel Club provides trips. New activities are being added regularly.

Carers

Cares are supported in many ways across the organisation from being part of all services to specifically targeted support. Carers support provides experienced staff to enable carers to have assistance or a reliable break from their caring responsibilities; this can be a regular visit or as and when required. It provides a bespoke service to meet the needs of the individuals. Time for Carers provides short term support for carers to take a break, holiday, or attend work or training course.

For example in targeted services alone over 400 people benefited with 4,591 hours delivered.

Day services

Working with ISSK Solutions the Age UK Stockport service provides a range of day services from full day building based sessions to short, one or two hour groups and activities based in local communities. Over 500 sessions were delivered in the year. A lot of time and energy went into preparing to move Day Services into a new Age UK Stockport associated company called Step Out Stockport which successfully launched on the 1st April 2014.



‘You made us feel like we mattered. You really listened, worked very quickly and with such professionalism. Marvellous.’

General support

Nearly 21,000 people benefited through a number of information, activities and events throughout the year, including around 3,000 general enquiries. For example the AGM, 1 October Older People’s Day celebrations and the now annual Winter Warmth Days. The Winter Warmth work has been greatly enhanced by bringing in external funding, including some with assistance from the Council team. The quarterly free Stockport Age Magazine is also an important part of keeping people informed and in touch so they know we are there if needed.

Case study

The focus of our work is to support people to live well and independently as long as possible, even when dealing with long term conditions.

Mr B a long time local resident aged 84 was referred through the local integrated hub and following initial assessment by a Social Worker was referred onto Age UK Stockport for Befriending type support. Mr B could be very low in mood and became extremely lonely and anxious and would often telephone the GP, police and ambulance service for help and he would frequently visit the Emergency Department of the local Stepping Hill Hospital. He called the various emergency services over one hundred times during one three month period.

Mr B was introduced to a worker and arrangements for a two hourly weekly visit were arranged. This relatively low level of support and knowing someone was there made the difference and quickly Mr B stopped making the calls and he also stopped attending the Hospital Emergency Department.

Because of the situation settling down and also financial concerns, Mr B's family cancelled the service and relatively quickly this resulted in him resuming his previous visits and demands on the health services.

Age UK Stockport supported Mr B's family to get direct payments and the service was reinstated again quickly leading to Mr again stopping his calls to emergency services. Mr B has also been supported to move nearer his daughter and both are happy with the current arrangements which will continue. Mr B's daughter has also advised that there has been a definite improvement in his health and wellbeing.

To note just a few of the many hundreds of comments received 'Your service makes us feel like we now have somewhere to ask somewhere to go.' 'It made a stressful situation bearable.' 'Such professional support' 'Within 6 weeks of your involvement I was feeling a lot better and finally going forwards.' 'If I required your services again I would feel confident in knowing that you were there.' As last year 99% of feedback was positive and 99% of our clients reported feeling better informed and supported after involvement with Age UK Stockport.



Mr B set up with **2 hour weekly visits** from one of our befrienders.

Supporting Delivery for effective, efficient and quality services

Age UK Stockport cares about local people's life experience as they get older. To ensure things happen as they should a lot happens behind the scenes to maintain an efficient organisation, positive support and representation of local older people and effective service delivery.

We continue to work hard to deliver comprehensive monitoring as well as timely reporting to ensure commissioners and funder's requirements and expectations are met. Also there was a continued focus on quality during the year with ongoing success with externally validated standards. Quality is checked through a number of feedback mechanisms which we are delighted to report achieve a near 100% positive response.

To support our vision, mission and values as stated our aims for 2014/15 are:

- To positively involve and engage with local older people, communities, commissioners and all stakeholders to ensure added value and continuous improvement in all we do.
- To provide accessible and quality services responsive to present and future needs and wishes of local people.
- To provide individuals with proactive 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 everyone's responsibility.

Quality & Standards

A Quality Policy based on the organisations core values underpins all the work. Quality is assured at all levels through policy, procedures and also through a number of externally assessed and accredited quality marks. All feedback goes through the CEO and a committed Quality Team with workers from across the organisation to ensure potential issues are proactively identified.

The main awards maintained in 2013/14 were ISO internally recognised standards ISO 9001 Quality and ISO 14001 Environment with UKAS accredited assessors. In addition the organisation continues to maintain the Investors in People award and was preparing for the undertaking the new Charity Commission backed Age UK Quality Standard during 2014.

Volunteering

Volunteers are an essential part of our support to older people and work in many different roles in the community, back office or directly with clients. They not only make many of our services possible by giving their time freely but they also work differently by bringing a true community perspective. To maintain our appreciation and commitment to volunteers the



Volunteers are **an essential part of our support** to older people.



organisation renewed the Investors in Volunteering award during the year.

Information Governance

The organisation also made a solid commitment to ensuring a high level of Information Governance as a key part of the quality promises to our clients and stakeholders, particularly around confidentiality and protection of privacy. The highly regarded international standard ISO 27001 first achieved in August 2012 was reconfirmed during the year.

Service Standards

In addition to organisational standards some individual services have to look to their own quality standards to ensure the best. The Social Isolation / Befriending Service successfully maintained the Befriending and Mentoring, Approved Provider Standard (APS).

The Handy Help Scheme also maintained the rigorous Foundations Handyperson Quality Mark. Achieving the Foundations standard also enables automatic entry onto the government backed national TrustMark directory.

Feedback maintained at 99% evidences the success of the commitments: 'Excellent 5 Stars', 'So appreciative of the prompt service', 'So professional', 'Exemplary workers, beyond my expectations', 'Helpful, kind and knowledgeable', 'Totally first class'.



Activities for support

Age UK Stockport offers a level and range of support beyond that available through direct charitable or grant funding as illustrated in the finance section. This over spend on charitable activities and potential deficit is dealt with by the organisations proactive work generating a flow of independent income raised through a balance of a number of actions.

Fundraising

Many funding applications continued throughout the year to the decreasing number and increasingly competitive trusts and funding agencies to seek to bring new monies into Stockport. Above average success was achieved, with assistance from the Council in leveraging external monies for winter warmth activities, support from brand partners Age UK in a number of small but important grant successes and particularly with EON, enabling additional benefits advice and free home safety equipment to local people.

Limited actual fundraising activities were undertaken during the year due to limited resources and expense but those events that were carried out were successful financially and in terms of awareness raising. It is planned to increase these activities in 2014/15.

Services and activities

A number of key preventative and proactive services continue to be well supported through contracts and grants with Stockport Council and the Clinical Commissioning Group. Values support was also received from Pennine Care to support mental health work and pressures. This is key work that contributes greatly, as shown above, to keeping people safe and well and away from primary and secondary health and social care services.

The use of individual or personal budgets for older people is slow but growing and the organisation is pleased to support older people in all respects and delivers direct services in response to personal budgets. In addition some services are now only

sustainable into the future through suggested donations and charges. Items such as safety slippers, a range of 'Get Connected' computer services and various activities were reviewed during the year with new charges being introduced.

Age UK Stockport Trading

Trading is a major strand of independent income. Age UK Stockport's associated company Age UK Stockport Trading offer's a range of Insurance, and other specially developed nationally backed products for the over 50's market. The trading activities work in a regulated environment under the Financial Conduct Authority and are regularly monitored and assessed for required compliance. The trading activities operate out of the new venue at Unit 34 Great Underbank, Merseyway Shopping Centre where face to face services are provided. Products include:

- Insurance (Home, Car, Motor Breakdown and Travel)
- Energy (Gas and Electricity)
- Financial Products (Equity Release, Annuities, Legal Services, Funeral Plans)
- Independent Support (Mobile Phones, Personal Alarms, Hearing Aids)
- Independent Living (stairlifts, bathing, chairs, beds etc.)

For information contact our office Monday to Friday. Each year surplus on the trading activities, plus some shop income contribute a significant sum of money to the work of the charity, and this amounted to nearly £90,000 in 2013/14, making a significant difference to the overall finances.

Representing and engagement

Finally working with and for older people directly is a core part of the work of the organisation, facilitated across the organisation and through roles such as the FILL (Facilitating Life & Lifestyles) to ensure older people are considered in the development of local strategies and developments. This particularly includes the now established Stockport Older People's Forum. Hard economic times mean increasingly there will be no funding for this important support so groups are gradually being supported to become independent where viable and so able to seek their own funding through membership or small grants available to small groups. Work also includes supporting national and local campaigns.



Finance and governance

The charity's objectives of delivering services to local older people were achieved through comprehensive risk management, low governance costs, clear designated funds and strong reserves.

As an incorporated charity Age UK Stockport is governed by the Directors, who are also the Charity Trustees, responsible for proper governance. They meet regularly and work to established conventions to determine the strategy in accordance with the objectives stated in the Memorandum and Articles. They also oversee the Charity's Risk Management Strategy including actions required to mitigate identified risks. The Chief Executive and Senior Management Team are appointed to ensure day to day management and to support the Board.



Income

	%	2014
Charitable activities	85	1,139,658
Activities for generating funds	10	135,299
Donations and legacies	4	54,366
Investment income	1	16,593
Total incoming resources		1,345,916

Income decreased from the previous year due almost entirely to two large legacies received in the previous year.

Expenditure

	%	2014
Charitable activities	93	1,182,819
Cost of generating funds	5	65,774
Governance costs	2	29,211
Total resources expended		1,277,804

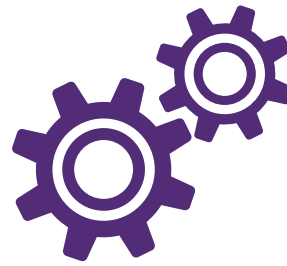


1,345,916

total income.

1,277,804

total expenditure.



Volunteer Value: A figure of over Four Hundred Thousand pounds is a conservative estimate of volunteering time provided annually.

Charitable expenditure increased slightly from 92% to 93% demonstrating the level of work in pursuing the charity's objectives of providing important services and public benefit. Governance costs were again maintained at a low 2%

The deficit on charitable activities continued again in this year at £58,587 but this deficit was again turned into an overall surplus by the charity's proactive efforts locally through donations, legacies, trading and other activities undertaken to raise independent income as shown in the following analysis:

Analysis of unrestricted surplus

	2014
Donation and legacies	51,624
Surplus on trading activities	87,995
Investment income	16,593
	156,212
Deficit on charitable activities	(58,587)
Net surplus for the year	97,625

The Board manages the resources available for investment with advice from appointed experts and the charity's freehold property is a key functional asset and a key strand in the long term investment strategy. The level of reserves has been maintained at six months following careful designation of funds to support service delivery commitments and future spending priorities.

As the year ended, and continuing into the current financial year 2014/15, the organisation was actively planning its response to the many anticipated changes in funding and commissioning to enable continued delivery of effective support to local older people.

Age UK Stockport

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Age UK Stockport is the working name of Age Concern Stockport, registered charity 1139547 and company limited by guarantee 7413632. Age UK Stockport Trading is a trading name of Age Concern Stockport Trading Limited, a limited company registered number 2956519. Age Concern Stockport Trading Limited is a trading company and subsidiary of Age Concern Stockport and donates its net profits to that charity Registered Office is Commonweal, 56 Wellington Street, Stockport SK1 3AQ. Age UK Stockport is an independent charity, partnered with the national charity Age UK and a member of the Age England Association; the membership and representative organisation for Age UK charities in England.