



Annual Report
April 2014 to March 2015

**Working locally
for positive choices
in later life**

Welcome to the Annual Report for the period April 2014 to March 2015.

Our key commitments are unchanged: our vision is for communities where older people are involved, valued and in control of their lives; our mission is to work locally for positive choices in later life; our work is supported by our core values of being Focused and Responsive and to the people we support, Experienced and Positive to ensure high quality services and Caring and Fair in all we do. The year also continued our commitment to quality through the success of a number of externally assessed and nationally and internationally recognised quality standards.

The general economic climate has translated locally to substantial reductions to Council budgets in the coming years and the need to implement 'radical modifications to service delivery models'. The Council's new Preventative Commissioning Strategy was launched in the year to 'preserve and create a sustainable preventative programme in Stockport which aims to prevent, reduce or delay local residents' need for and use of housing support, social care and healthcare services'. As a consequence the last twelve months has been a story of two halves for the organisation and the local third sector generally!

The first half of the year operated much as before with the main contracts to deliver our services funded by local statutory agencies fundamentally unchanged with the exception of Day Services which we had moved to a new associated company. The new company Step Out Stockport completed its first full year of operation providing day care and activities and at the end of the year was both continuing to increase its number of members and also reviewing and developing to ensure the offer remains relevant to people's needs and wishes. The second half of the year, from October, started with receiving notice that all our contract funding would end during the next year 15/16. So along with maintaining delivery, the rest of the year required a new focus, energy and unprecedented commitment from the senior team to understand the level and type of change required and to pursue every opportunity relevant and possible to ensure local older people continued to be both heard and served.

At the end of the year the new commissioning was still only just starting and so there remained significant uncertainty for the future of the organisation, and in fact most of the local charities. However, Age UK Stockport was part of a bidding group of six organisations for the first part of the new commissioning process, the Targeted Prevention Alliance. This was considered vital for local older people as it would be a service that although different in many ways would in effect replace our crucial and successful Wayfinder service when funding was lost. We were also planning to be part of the second phase, the Wellbeing and Independence Network as this would also replace key practical services that we know from experience make a difference to the health, wellbeing and independence of local older people.

Throughout this tendering process the organisation has been crucially aware of its commitment and responsibilities to local older people and also critically aware of the ground breaking breadth and depth of the change in the environment, and so has been committed to learning and also to responding positively to commissioners' changing requirements.

The new commissioning process will be completed by the end of 2015 after which there will be an opportunity to review how successful we have been in being part of the new preventative services and also to review how we develop as an organisation around this and begin to reshape and restructure accordingly.

The now established brand partnership with the national organisation Age UK has enabled the organisation to benefit from being part of a larger and nationally recognised brand whilst also remaining strongly committed to its roots as a local and independent Stockport charity. It has provided some opportunities for funding through Eon, important trading activities and a Charity Commission recognised Quality Counts standard. At the end of the year the renegotiation of both the brand partnership agreement with Age UK nationally and the Trading Alliance agreement for the trading activities were progressing well towards a date of April 2016. Considerable work will be involved by all parties as the relationship continues to mature and develop.

The following few pages highlight the work done in the reporting year:

SERVICE DELIVERY

Service delivery in the year was similar to the previous year in terms of style and numbers of people reached. The implementation of our mission and values were achieved by providing a wide range of practical, personal, emotional and social support to local older people and their carers. Each person was dealt with flexibly through a holistic and respectful approach to ensure individually focused delivery.

Services developed from experience over many years were aimed at supporting people to stay well, safe and independent. The following highlights delivery in the reporting year:

45,564 local people were supported by Age UK Stockport this year, over 70% of which were new referrals (some double counting as people received more than one service).

11,584 represented case work of various levels of complexity and home visiting remained of importance to our client group. As an indication of the activity levels in an average week there were across all services over 1,000 phone calls and around 380 home visits made in addition to the significant planning, preparation and recording work done at the offices.

WAYFINDER was the first point of entry, delivering immediate support from first contact and with a proactive focus on preventing people, including those with long term conditions, from needing health and social care services. Each person was given as much or as little encouragement and support as they required to consider their options and to action their choices.

This included the Community team, where each person was linked to a key worker, and also the Public Office now established in Merseyway. During the year there were 9,563 referrals of which nearly half were casework, 27 Safeguarding cases were reported and nearly £1,250,000 of benefits claimed. Also the Hospital team of skilled and experienced staff assisted 3,468 people to settle home well and safely and avoid readmission, an increase again on the previous year.

WELLBEING services delivered support with a specialist focus, often working closely with the key worker, and included whatever focused support was required, including practical, social and emotional. The support was sometimes short term, but often over medium or longer periods and the team dealt with 6,690 referrals in the year, an increase on the previous year.

"Friendly yet so professional and most importantly effective!

I am still in my home thanks to you" Age UK Stockport Client

SERVICE DELIVERY continued

This included **Practical Services** focused on assisting people to live independently in their own home for as long as possible; such as 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 financial advice over a few weeks to a long term shopping or pension collection service providing weekly support.

Easy Shop made 12,147 calls and processed over 6,000 orders; nearly 900 safety checks and 1,115 practical resources for home safety; IT support to nearly 300 people including home visits; Handy Help and Gardening jobs and advice totalled 5,525 including home risk assessments.

Supporting You provided 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 applied as much to people already dealing with long term conditions as to those dealing with the more general issues of later life. Support was individually tailored so as much or as little was provided to enable people to meet their goals and live as independently as possible. These services therefore work incredibly flexibly with each person for as long as appropriate.

Social Support delivered a variety of opportunities from group activities to individual support and encouragement to engage with social and other activities. For example, the Out and About Service provided a great selection of social groups and activities such as singing groups, friendship groups and pub lunches. 824 Tai Chi sessions were provided in various venues and the Travel Club provided a number of trips. New activities are being added regularly and Age UK Stockport also now works increasingly with associated company Step Out Stockport to develop new activities. For example an allotment group planned and then introduced in 2015/16, and a new 'The Shed' activity for handcrafts, based on the Men in Sheds movement.

Tackling and Reducing Social Isolation was a particular focus for the year. The range and capacity of activities were increased and led to 20,604 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 house-bound. Delivery included the following, many of which increased in the year:

Befriending Services 6,188 sessions

Emotional support 3,390 sessions

Mobility support / walking practice to over 745 people

Health Check and Occupational Therapy support to 412 people

2,322 Counselling sessions with 268 new referrals

Day services and activities were moved into a new associated company, Step Out Stockport, from April 2014. In its first year it continued to provide a range of day services from full day building based sessions to short, one or two hour groups and activities based in a range of local community venues. It also continued to develop the range of activities on offer and even more development is planned in the near future, particularly around new approaches to dementia support.

PLACEMENT SERVICE

The Placement Service provided specialist and experienced information, advice and support to people, their families or carers, already in or considering long term care. Following a successful tender the service was relocated within Stepping Hill Hospital to facilitate the focus on Hospital Discharge and increased its delivery significantly with 468 people assisted in the year and 359 actual placements. In addition the service met commissioning targets for discharge from Hospital in around 88% of cases and received 99% positive feedback from clients.

CARERS

Carers were supported in many ways across the organisation being part of the general offer of all services and also specifically targeted support. Carers Support Service provided experienced staff to enable carers to have assistance or a reliable break from their caring responsibilities for training, work or just a break. This was a regular visit or as and when required to meet the needs of both the carer and the individual. For example in targeted services 328 people benefited regularly and 5,150 general services were delivered to carers.

GENERAL SUPPORT

Around 20,000 people benefited through information sessions and other events and activities throughout the year. For example the AGM, Older People's Day celebrations and the annual Winter Warmth Days. The free Stockport Age Magazine keeps people informed and reminds people we are there if needed. In addition to the high number of referrals or requests for advice information, services or assistance the organisation dealt with around 3,000 general enquiries.

THE FUTURE

This range of services continued until the summer of 2015 when the funding for most came to an end. Consequently by the end of 2015 all current services had either already significantly changed or were under review for change or closure. New preventative services were formally launched in November 2015 as part of Stockport Council's Investing in Stockport programme, looking to provide effective wellbeing support for adults within reduced budgets. Some of the new services are provided collaboratively by Stockport-based voluntary sector organisations, and this includes Age UK Stockport. Our next report will report on all reviews and new work.

AGE UK STOCKPORT TRADING

Trading is an increasingly important strand of independent income. The associated company Age UK Stockport Trading offer's a range of specially developed, nationally backed, products for the over 50's market. The trading activities now established in our Merseyway office work in a regulated environment under the Financial Conduct Authority and are regularly monitored and assessed for required compliance. Products include:

- Insurance (Home, Car, Motor Breakdown and Travel)
- Financial Products (Equity Release, Annuities, Legal Services, Funeral Plans)
- Independent Support (Mobile Phones, Personal Alarms, Hearing Aids)
- Independent Living (Mobility Scooters, Stairlifts, Bathing, Chairs, Beds etc.)

In addition to providing access to well developed products the surplus on the trading activities contribute a significant sum of money to the work of the charity.

GOVERNANCE & FINANCIAL REVIEW

The charity's objectives of delivering services to local older people were achieved through comprehensive and robust risk management, 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 and in accordance with the objectives stated in the Memorandum and Articles. The Chief Executive Officer and Senior Management Team are appointed to ensure day to day management and to support the Board. The finances for the year were:

Income	%	£	Expenditure	%	£
Charitable activities	87	1,047,763	Charitable activities	89	1,018,854
Activities for generating	11	132,928	Cost of generating	7	83,871
Donations & Legacies	1	10,121	Governance Costs	4	42,692
Investment Income	1	18,774			
Total Incoming resources		1,209,586	Total resources expended		1,145,417

The main change and reduction in income and expenditure followed the movement of funding for day services into the new associated company Step Out Stockport. Governance costs increased for the first time in many years due to the time required from the senior team and also central services such as HR, IT and Finance to deal with the many and continuing changes and pursue the tendering opportunities.

The deficit on charitable activities continued again this year but at a reduced level of £13,249. This deficit was again turned into an overall surplus by the charities proactive efforts locally through donations, trading and other activities undertaken to raise independent income. The overall trading income was reduced in the year because of start up costs for the Hat Works use. The actual income from trading activities remained strong as in previous years.

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 the organisation was continuing quality delivery under the current contract and also in the midst of responding to the very different funding and delivery mechanisms within the local Council tendering opportunities. The focus of everyone involved with the organisation remains on enabling the delivery of effective support to local older people now and in the future.

Volunteer Value: An impressive figure of over Four Hundred Thousand pounds remains a conservative estimate of volunteering time provided annually. Like all else in the organisation volunteering is changing and will increase in some areas and decrease in others. In recognition of the essential part volunteers play the Trustees have made a firm commitment to continue to support volunteering for the foreseeable future from designated funds.

QUALITY

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 quality service delivery.

There was a continued focus on quality with ongoing success with externally validated standards. The main awards maintained in the year were the highly regarded International standards ISO 9001 Quality and ISO 27001 Information Governance, and the Investors in People and Investors in Volunteering award were also maintained. In addition the new Age UK Quality Standard, which is backed by the Charity commission, was also achieved.

Quality is checked through a number of feedback mechanisms which we are delighted to report again achieved a near 100% positive response:

"Interested, committed and prepared to go the extra mile"

"Excellent in both attitude and approach"

"Business like and professional but empathetic and patient also"

"You really listen and then have either helped or you point us in the right direction"

"Nothing was too much trouble—made a great deal of difference to my quality of life"

"I feel so much more confident knowing Age UK Stockport is there"

"I felt so isolated—with your help I can look forward to the future positively again"

"I felt so respected—your help made staying in my home possible. MARVELLOUS!"

FINALLY

In view of the many and significant changes in the funding for services from September 2015 and the fundamental changes in local delivery of preventative services our mission and aims will be fully reviewed later in 2016 as part of an ongoing general review and restructure. This will ensure Age UK Stockport remains responsive to the changing wider environment but still firmly focused on and committed to its core mission of supporting local older people.

Thanks are due to all involved as never before. People at all levels of the organisation have had to deal with a high level of uncertainty and challenging changes, whilst successfully maintaining quality service delivery. The senior management team have responded with skill and sustained commitment over a long period of time to work to secure the role of the organisation in working for local older people in the future; all the staff continued to work with a sincere commitment to service delivery and outcomes for individual clients; volunteers gave generously of their time and energy to many areas of work within the organisation; and finally the directors and trustees gave the necessary time to govern with considerable experience and dedication to our mission in what continues to be exceptionally turbulent times.

Derek Caldwell, Chair of Trustees

Margaret J Brade, Chief Executive Officer

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Age UK Stockport is the working name of Age Concern Stockport, registered charity 1139547 and company limited by guarantee 7413632. Registered Office 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.