



Annual Report
April 2015 to March 2016

**Working locally for your
wellbeing**

Welcome to the Annual Report for the period April 2015 to March 2016.

Our key commitments were unchanged in this reporting year to March 2016 with our vision for communities where older people are involved, valued and in control of their lives and our mission to work locally for positive choices in later life. All our work is supported by our six core values of being Focused and Responsive to the people we support, Experienced and Positive to ensure high quality services and Caring and Fair in all we do. However as planned, since the year end a wide ranging stakeholder consultation has been undertaken and by 1st August 2016 completely new key statements and aims were agreed - more on these later.

In last years report we talked of a year of two halves! Although delivery was maintained under the main contracts throughout, notice on the contracts half way through meant the second half of the year had been focused on understanding the level of change required and pursuing relevant and possible opportunities to ensure local older people continued to be both heard and supported. The current reporting year of April 2015 to March 2016 has been another year of two halves as the funding actually ended half way through; or in fact a year of many parts, but on a larger scale and much more significantly for the whole organisation!

For the senior team the year was dominated by being focused on working with new partners to be part of writing new bids and tenders, or actually starting to set up and establish new delivery from tenders where we had been part of a successful group. For the whole organisation the year was one of considerable uncertainty and turmoil with workers asked to deal with and respond to unprecedented levels of change.

At the start of the year the new commissioning was just starting with Age UK Stockport being part of a successful bidding group of six for The Targeted Prevention Alliance. This was considered vital for us to support local older people as it would be a service that although different in many ways would in effect replace our crucial and award winning Wayfinder service when funding came to an end. During the year we were also successful in a Wellbeing at Home service, part of the next phase the Wellbeing and Independence Network. This was again considered vital to replace key practical services that we know from our experience make a difference to the health, wellbeing and independence of local older people. Whilst we seriously regret the loss of good services, for ourselves and across the sector, we acknowledge the wider financial influences that have driven a change in delivery and are proud to be part of these new preventative services with a real opportunity to continue to deliver and influence for the benefit of older people.

In terms of actual delivery the year has been very fragmented as established services came to a forced end at various points during the period from June to September when funding ceased and / or new services were being introduced and workers were moving from one to the other. The following report will highlight the operational dates that illustrate this.

In addition, around this significant level of shift and change, the Board and senior team have also been committed to working hard to find positive ways to respond that will enable the wider organisation to reshape and restructure accordingly. At the year end we were delighted to be successful in a bid to the Local Sustainability Fund that has enabled us to undertake a lot of work across all of the organisation and with all stakeholders. Through this work during the year 16/17 we will have a clear sense of how we will support and work positively with the new locality based environment and most importantly how we continue our commitment to deliver real value to local older people. So whilst still very challenging and requiring new skills and a willingness to continue to adapt and change we continue to be optimistic that we can still hold to our core principles and deliver and provide public benefit.

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. During the year a lot of work was undertaken relating to the renegotiation of both the brand partnership agreement with Age UK at and the Trading Alliance agreement with Age UK Enterprises for trading activities, and although the date of April 2016 was not met, both agreements have since been successfully completed.

AUKS SERVICE DELIVERY

All Age UK Stockport's (AUKS) work is based on supporting local people to stay well, safe and living independently in their communities for as long as possible. Throughout the reporting year we continued to provide a range of practical, emotional and social support to local people and their carers through a flexible and holistic approach and individually focused delivery.

As predicted in last years report, 2015 became very much a 'transitional' year. That was due to the fundamental shifts and changes across the system, in funding structures as well as styles and methods of delivery. This was made even more complex by the fact the changes took place and new services started at different times throughout the year. Consequently almost all the services previously reported on were either under review for change or for closure. All this has made it very different from any previous year and the following highlights a mix of old and new activities over different time periods of the reporting year from April 2015 to March 2016.

An overall figure of local people supported by Age UK Stockport in the year cannot be precisely calculated as it has to be drawn from different sources as services transferred, and some of these are unavailable or unreliable. However, numbers counted on our own systems were over 30,000 so it is reasonable to expect the actual numbers to be similar to the last few years, in the region of 44,000, with approximately 70% new referrals.

OVERALL Wayfinder was the award winning entry point to Age UK Stockport but numbers were only recorded for April (465) as after this the service closed and the new Targeted Prevention Alliance (TPA) commenced in July. The TPA was delivered by six organisations of which Age UK Stockport is one so it is not a straight forward calculation, plus numbers were not available due to some problems with the required database, which has since been replaced.

The impact of the various changes, closures and transitions mean that the numbers are either not available or significantly under counted for some parts of this year. However, we can confirm some numbers counted through our own systems as follows:

3,553 people supported through our Public Office in Merseyway for the six months to September
£1 million of benefits claimed not including Wayfinder Community / TPA

3,550 people to settle back home well and safely and avoid readmission by the Hospital team

4,500 Health & Wellbeing Checks actually processed over the year

From our own recording alone an indication of activity levels in an average week showed around 160 cases of various levels of complexity being supported, and across all services nearly 1,000 phone calls and around 285 home visits made in addition to the significant planning, preparation and recording work done at the offices. Actual numbers will be higher as noted above.

GENERAL SUPPORT Around 13,500 people benefited through information sessions and other events and activities throughout the year; for example the AGM, Older People's Day and the annual Winter Warmth Days. The free Stockport Age Magazine keeps people informed and also reminds people we are there if needed.

AUKS SERVICE DELIVERY continued

WELLBEING & WELLBEING AT HOME services delivered a range of focused support which included practical, social and emotional services. The support was sometimes short term, but often over medium or longer periods. Numbers are split between the original services operating through most of the first half of the year and the new Wellbeing at Home Service (part of the Wellbeing & Independence Network (WIN)) operating from October 16. Total figures across the two services were at least 12,000 and included some of the following services detailed below. In addition during this work 18 Safeguarding cases were reported (not including the TPA).

Practical Services focused on assisting people to live independently in their own home for as long as possible. For example Handy Help, Gardening, Shopping, Pension collection, and also Digital Inclusion. In the year Easy Shop made 10,080 calls, nearly 500 safety checks and 1,115 practical resources for home safety were delivered, IT support given to nearly 200 people, and Handy Help and Gardening jobs and advice totalled 5,797 including home risk assessments.

Social Support delivered a variety of opportunities, from group activities to individual support and encouragement to engage with social and other activities. For example, Out and About provided a great selection of social groups and activities such as singing groups, friendship groups and pub lunches. An increase to 1,104 clients benefiting from Tai Chi sessions in various venues and the Travel Club provided a range of trips. New activities are being added regularly.

Emotional support was provided through a range of services to increase confidence and general wellbeing, all with the focus of building on people's strengths to enable people to meet their goals, see a better future, and live as independently as possible. This applied as much to those that were already dealing with long term conditions as to those dealing with more general issues of later life. Support was individually tailored to as much or as little as appropriate.

The Age UK Stockport Wellbeing services changed significantly during the year with some ceasing, some moving into being part of the new services, some changing in both delivery or funding and others becoming charged for services. This was all still under development at the year end. The Wellbeing at Home service is free at the point of delivery and focused on short-term and practical support and helping people to organise longer-term arrangements, with the purpose of preventing, reducing or delaying more health or social care needs.

TACKLING AND REDUCING SOCIAL ISOLATION was again a particular focus for the year. The range and capacity of activities were increased by 20% with 24,754 personal and telephone contacts. This included a range of activities including Befriending Services which increased to 6,240 sessions and emotional support also increased to 3,460 sessions.

THE PLACEMENT SERVICE is located within Stepping Hill Hospital and provided experienced information, advice and support to people, their families or carers, already in or considering long term care. It had a particular focus on Hospital Discharge and increased its delivery again with 514 people assisted in the year and 327 actual placements. In addition, the service again achieved commissioning targets for timely discharge from Hospital in around 86% of cases and received 99% positive feedback from clients.

CARERS were supported across the organisation as part of the general offer and also through specifically targeted support. Support Services provided trained staff to enable carers to have assistance or a reliable break through a regular visit or as and when required to meet the needs of both the carer and the individual. For example, in services targeted for carers 715 carers benefited with over 4,000 hours of support delivered.

DAY SERVICES & ACTIVITIES

Day Services were moved into a new associated company, **Step Out Stockport** in 2014, which operated fully independently in this reporting year from April 2015. It continued to provide a range of times and sessions to suit each person's individual needs over 7 days a week. It also continued to develop the range of fun, support and social activities and even more development is planned in the near future, particularly around new approaches to dementia support.

AGE UK STOCKPORT TRADING

Trading activities remains an important strand of independent income. The associated company Age UK Stockport Trading offers 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 (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 directly to the work of the charity.

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 an increased focus on quality during the year to ensure it was maintained through the many changes. There continued to be great success with externally validated standards which included maintaining for a further year the highly regarded International Standards ISO 9001 Quality and ISO 27001 Information Governance. The Age UK Quality Standard and the Investors in Volunteering award were also maintained and the organisation was preparing for the Investors in People renewal at the year end—which has since been successfully achieved.

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

"This was my first visit to Age UK Stockport. Any further problems it will be my first place to go."

"I feel so much more confident knowing you are there and I can contact any time"

"Please keep doing what you do – and in the kind and professional way that you do it"

"Very professional but nice with it—I felt understood and respected which is not always the case"

"Someone who really understood my issues and older people—really first class"

"Your staff make people feel they are a person and not a number or a nuisance"

"Practical help and support, kind encouragement—you know what older people need"

GOVERNANCE & FINANCIAL REVIEW

The charity's objectives of delivering services to local older people have been achieved through comprehensive and robust risk management, clear designated funds and strong reserves. Also through continuing to be proactive about understanding the many changes in the environment around us, and responding positively and flexibly. These changes have been both at a national and regional policy level and at a local commissioning level.

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 working to established conventions to determine the strategy in accordance with the objectives. 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. The finances for the year were:

Income	%	£	Expenditure	%	£
Charitable activities	62	928,034	Charitable activities	88	1,042,670
Activities for generating funds	10	155,493	Cost of generating funds	8	95,620
Donations & Legacies	27	403,273	Governance Costs	4	43,469
Investment Income	1	22,453			
Total Incoming resources		1,509,253	Total resources expended		1,181,759

The main change is an increase in income related to a restricted fund donation from Step Out Stockport, an associated company operating day services for Age UK Stockport; such funds are restricted to be used specifically for similar day support. This, together with generous legacies totalling £80,000 has resulted in a significant increase in donations. Whilst the actual remaining income remained similar to last year these changes have impacted on all other percentages. However as detailed above, within the figures for contracts and grants there were significant changes with the loss of the core contract by September 2015 but the start of the TPA and WIN contracts in June and in October respectively during the year.

Governance costs increased in 2015 for the first time in many years due to the time required from the senior team and support services such as HR, IT and Finance to deal with the many and continuing changes involved in pursuing the tendering opportunities and changing staffing structures. This trend continued in 2016 with costs remaining at a similar level.

The deficit on charitable activities continued again this year and increased from last year at £49,550. This increase included specific decisions by the Board to support some activities after funding ceased in September 2015 including £20,462 Supporting Ageing Well and the balance on general Wellbeing services. This was in addition to the use of some restricted funds to enable ongoing support for volunteering and community work.

This deficit was again turned into an overall surplus by the charities proactive efforts locally to increase independent income. Analysis of unrestricted surplus showed this was mainly achieved through surplus on trading activities (£64,673) and Donations and Legacies (£113,495). Investments suffered a loss of £23,027 in line with general stock market conditions; however, since the investment was originally made an accumulated surplus of £86,849 has been achieved so it has represented a solid investment.

The income from trading activities remained strong as in previous years, even in the face of the increasing challenges and competition. However the overall trading expenses increased in the year due to running the Hat Works café. Unfortunately with planned increases in rental costs and an already existing deficit in running costs as against income the project was brought to an end in March 2016 to avoid any further loss to the charity.

The Board manages the resources available for investment with advice from appointed experts and the charity's freehold property is a key functional asset 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. At the end of the year the organisation was continuing to adjust to the many changes whilst keeping a clear focus on enabling the delivery of effective support to local older people now and in the future.

Volunteer Value: A figure of around Four Hundred Thousand pounds remains a conservative estimate of volunteering time provided annually. At the year end this was a reducing figure due to the loss of various projects and services and so a reduction in the number of volunteers. 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.

FINALLY

As committed to in last year's report, a full organisational review was commenced at the end of this reporting year in March 2016. This set out a comprehensive timetable of work involving all our stakeholders and this is still continuing as we write this report. This is to ensure Age UK Stockport remains relevant and responsive in the changing wider environment but also still firmly focused on and committed to its core mission and aims of supporting local older people.

This has involved a raft of work around our objectives and structures, core statements and our commitments as well as wider issues such as new approaches and ways of working, processes and new technology and developing a new Social Value statement and policy as part of our work and forward commitments. We are currently planning further work through meetings and reviews in December and into next year and will look forward to sharing all this in our next report on the year 2016/17.

It has also involved us being able to make better informed decisions around investing from our own resources to support and maintain some services during the many changes in this reporting year and also planning further investments in the year 2016/17 and future years. In the reporting year this included directly supporting volunteering, some community work and central costs, and some direct delivery around befriending and social isolation.

Thanks are again due to all involved in what continues to be turbulent and challenging times. The senior management team have continued to respond with both skill and sustained commitment to secure Age UK Stockport's role in working for local older people in the future; all the staff have continued to work with a sincere commitment to provide benefit and positive outcomes for all those we work with; volunteers gave generously of their time and energy to help sustain many areas of work within the organisation; and the trustees have given and continue to give a great deal of time, particularly with the ongoing organisation wide review, to govern with considerable skill and experience.

Derek Caldwell, Chair of Trustees

Margaret J Brade, Chief Executive Officer

October 2016.

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