



Annual Report
April 2016 to March 2017

**Working locally for your
wellbeing**

Welcome to the Annual Report for the period April 2016 to March 2017.

A comprehensive organisational review that commenced in March 2016 was completed during the year to ensure Age UK Stockport remains relevant and responsive in the changing wider environment but also still firmly focused on and committed to supporting local older people.

Our key commitments have been fully updated, with a vision for Stockport to be a place where everyone is able to make the most of later life, living as valued members of their communities. The mission of Age UK Stockport was updated to be working locally for your wellbeing. All we do is supported by our values, based on being a caring and community focused organisation that is connected, confident and creative. The year also continued our strong commitment to quality through the success of a number of externally assessed and internationally recognised quality standards.

The general economic climate has continued to translate locally with sustained and significant pressure on all statutory funding. This has combined with other pressures reflected in national trends around hospital admission, discharge and capacity to deliver quality social care. With the increasing influence of the Greater Manchester devolution agenda and the growth of Stockport Together as a major co-coordinating and transformation structure in health and social care it has all contributed to a complex, uncertain and fast changing environment to both work and plan in. The Board and the management have responded positively by developing a more agile and emergent planning process to enable the organisation to be both responsive and also proactive. Following stakeholder consultation and staff input a new Business Plan and planning process came into place in March 17 and is now driving action going forwards.

This year has seen the first full year of the Council preventative service commissions operating, although they commenced from different dates. They were established to 'preserve and create a sustainable preventative programme in Stockport which aims to prevent, reduce or delay local residents' need and use of housing support, social care and healthcare services'. The Prevention Alliance completed its first year in May 2016 and the Wellbeing and Independence Network in September 2016. So this reporting year has been about moving and establishing these services into their second years of delivery, whilst also continuing to be part of new solutions developed with a range of partners at the Hospital to address specific challenges.

Through the changes over the last two years the organisation has been critically aware of its commitment and responsibilities to local older people and has taken every opportunity to ensure the voice of older people is heard and that local older people can benefit from the reducing number of free support services. This commitment remains. Alongside this the organisation has had to reshape and develop itself, beyond the commissions and particularly in local communities. This also included working to balance income, and work was started in the year to develop other funding strategies such as funding applications and charged for services and looking at more fundraising in the coming year.

The established brand partnership with the national organisation Age UK was renewed in April 2016 for five years, after a long period of negotiation, and alongside this the Trading Agreement was also renewed for a similar period. It 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. It has also provided some opportunities for funding through Eon and other grants, continued involvement through trading activities and also leads to an important commitment to an Organisational Quality Standard. Many national charities are facing challenges and so both agreements will be monitored to ensure continued relevance and benefit locally.

AUKS SERVICE DELIVERY

All Age UK Stockport's (AUKS) work is based on supporting local people's wellbeing. That is, 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 families, friends and carers through a flexible and holistic approach and individually focused person-led delivery.

As reported in the last two annual reports the organisations structure, financing and delivery have been subject to significant change following fundamental shifts across the health and social care system. This is in funding structures as well as methods of delivery. As a consequence many of the services reported on for some years have either been lost, reviewed or changed and there are also some new initiatives being introduced. This means meaningful comparative data is very limited. In addition, data now has to be drawn from a number of different sources as more work is done in collaborations, networks and alliances. Some early data collection challenges in some of these services also suggest there may still be some undercounting and/or reporting.

Overall data from the various sources show that Age UK Stockport continued to support a high number of local people, just under 26,000 directly through Age UK Stockport services and through the work of the various collaborations we are involved with. This included throughout the reporting year The Prevention Alliance (TPA), the Wellbeing at Home part of the Wellbeing and Independence Network (WIN), and our involvement with Stockport Advocacy. Also from October 2016 a new 'Back Home' service was introduced, again working with a range of partners including the TPA and other members of the Integrated Transfer Team at Stepping Hill Hospital. The number of new referrals was as previously reported at around 65%.

As an indication of the volume of work we can report some numbers counted through our own systems as follows:

10,574 people benefited through events and activities throughout the year; for example the AGM, Older People's Day and the annual Winter Warmth Days; the free Age UK Stockport Magazine keeps people informed and also reminds people we are there if needed. Levels of activity showed 8,651 home visits and over 33,800 telephone contacts (excluding TPA).

Social Support delivered a variety of ways, from group activities to individual support and encouragement to engage with social and other activities. For example activities such as singing groups, friendship groups and pub lunches. Also popular and positive were the Sound Minds mental health groups enhancing peoples sense of welling through support and social interaction. 1,056 people benefiting from Tai Chi sessions in various venues and the Travel Club provided a range of trips. New activities are regularly reviewed.

Some specific area of focus for Age UK Stockport included the following:

INFORMATION & ADVICE is a core service. During the year 6,769 people were supported through our Public Office Information and Advice service in Merseyway which provides a wide range of information and advice by telephone, to callers or if necessary through a home visit. The service also provides easy access to a comprehensive set of Factsheets and Guidance sheets from Age UK and application support for benefits and Blue Badges. As one example of service value the work brought in £1,057,000 of benefits claimed through Age UK Stockport alone.

TACKLING AND REDUCING SOCIAL ISOLATION remains a high priority. This was achieved through a range of activities with 19,824 personal and telephone contacts, 5,133 Befriending Services sessions and emotional support 2,927 sessions.

SUPPORT SERVICES & CARERS were supported across the organisation and also through specific 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 needs. For example 5,376 hours of support were delivered in the year.

AUKS SERVICE DELIVERY continued

HOSPITAL DISCHARGE, based at Stepping Hill Hospital, was delivered in a number of ways, reflecting our commitment to contribute in this important area. Through general Age UK Stockport work, delivery through the Wellbeing at Home Service (part of WIN) and from October 2016 a new collaborative service 'Back Home', work in this area combined to reach an increased number of 5,462 people. **Back Home** is a pilot project with the TPA and others developed in the second part of the year and into 17/18 and hoping through increased integrated working to start to make a difference to the many pressures in this area.

THE PLACEMENT SERVICE is also located within Stepping Hill Hospital as part of the wider Integrated Transfer Team and provides experienced information, advice and support to clients, their families or carers considering long term care. It has a particular focus on Hospital Discharge and increased year on year delivery again with 599 people assisted in the year and 321 actual placements. In addition, the service again achieved commissioning targets for timely discharge from Hospital in around 85% of cases and received 99% positive feedback from clients. In the year the retendered contract was secured and we are really pleased to be continuing this work.

Through Commissioned services Age UK was part of delivering:

WELLBEING AT HOME part of the Wellbeing & Independence Network (WIN) focuses on support, in and around the home environment, enabling people to continue living in their own homes, independently and safely. It is delivered by Age UK Stockport in partnership with Stockport Homes, Signpost for Carers and Disability Stockport. The team provide short-term support or help to organise longer-term arrangement with the purpose of preventing, reducing or delaying more health or social care needs. Practical support includes shopping, gardening, cleaning and home maintenance. Home safety checks are available to look at improving fuel efficiency and warmth, and advice on any adaptations can be given. Overall Wellbeing at Home supported 12,441 people in the reporting year, including Handy Help, Gardening, Shopping, and Pension collection. Easy Shop made 9,108 calls, there were 456 home safety checks and 432 practical resources for home safety and 505 Telecare jobs completed. Handy Help and Gardening jobs and advice totalled 4,000.

THE PREVENTION ALLIANCE (TPA) was originally called the Targeted Prevention Alliance. It is delivered as part of a collaborative alliance involving Age UK Stockport, Synergy Stockport, TLC: Talk Listen Change (formerly Relate GMS), Nacro, Threshold and Stockport Homes all working together with the commissioners Stockport Council. The TPA works with local people to improve their health and wellbeing, by providing support to people that want to make change happen in their lives. This covers a wide spectrum which includes information or advice to more time and support to those with more complex issues. It is based on a one-to-one asset based approaches and also actively encourages community engagement and support. During the year approximately 5,690 people engaged with the TPA.

Volunteering & Community Engagement 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. Whilst the numbers of volunteers has reduced as services have been lost and reshaped we remain committed to valuing the great benefit volunteers bring to the organisation and look to increasing the number again in the future.

We are also actively planning to increase our general work with and in communities, to ensure older people are considered in the development of local strategies and developments. Work also includes supporting national and local campaigns. At the end of the year Public Health was applying for Stockport to become part of the **Age Friendly** network which is a great development which Age UK Stockport welcomes and looks forward to supporting in 2018.

STEP OUT STOCKPORT

Day Services were moved into this associated company in 2014 and are brought within these consolidated accounts for the first time in this reporting year. Step Out offers important Day Care services and activities, highly valued by its members. It was also successful in being included on the SMBC day services framework during the year which supported a tiered service offer.

From the start Step Out have set out plans and actions to ensure it is delivering a quality service that is meeting local needs and also covering its costs. Much has been achieved in improving and developing the service but there is more to be done to establish financial viability. A number of processes were put in place to tackle inherited issues of poor cancellation attitudes and bad debt / slow payments. Health and Safety expertise has also been brought in to ensure good and safe practice along with ongoing reviews of food, transport and entertainment.

Also during the year all the services were integrated into one building at Whitehill as a suitable environment and the staffing structure was reviewed. This was achieved efficiently and everyone was accommodated successfully. Once financial sustainability is established, hopefully by 2018, it will then be the foundation for further development and investment in both the physical environment and the range of support, and a restricted fund is held within the charity for this purpose.

The centre offer a varied programme of activities and entertainment, meals and opportunities to socialise and make friends or just enjoy the atmosphere. Special activities at the centres and also at other localities included Singing Groups, Walking Groups, Allotment Group, Pub lunches and more are being reviewed and developed.

Step Out Stockport delivers flexible options for day services that are both building based and within the community. Open Monday to Saturday with plans to open Sunday if required, it offers a choice of 4, 6 or 8 hour sessions. During the reporting year Step Out delivered between 800 and 840 places each month with an average of 95% actual take up.

AGE UK STOCKPORT TRADING

Trading remains an important strand of independent income as each year surplus on the trading activities contribute to the work of the charity making a positive difference to the overall finances. However the service is also important as it provides personal friendly support to older people to access relevant products through a face to face approach.

Age UK Stockport's associated company Age UK Stockport Trading offers 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 who regularly monitor and assess 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.)

The independent support and living products were particularly successful in the reporting year

The trading activities are part of the Information Advice and support work provided from our public office at Unit 34 Great Underbank, Merseyway Shopping Centre where an important face to face personal service is available. There are many challenges to trading going forwards and the Board are actively keeping performance under review to ensure it delivers both quality products and services and an appropriate contribution to the work of the charity.

GOVERNANCE & FINANCIAL REVIEW

The charity's objectives of delivering effective services to local older people were achieved through a comprehensive risk management approach, low governance costs, clear designated funds and strong use of reserves. In addition by being proactive about understanding the many changes in the organisations external environment, at a national and regional policy level as well as at a local commissioning level, and responding positively and flexibly by introducing emergent planning approaches. Such approaches also contributed to securing the future sustainability of the organisation.

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 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. 2017 Finances were:

Income	%	£	Expenditure	%	£
Charitable activities	72	1,118,394	Charitable activities	78.5	1,230,716
Activities for generating funds	26	393,615	Cost of generating funds	19.5	306,491
Donations & Legacies	1	12,367	Governance Costs	2	30,490
Investment Income	1	18,098			
Total Incoming resources		1,542,474	Total resources expended		1,567,697

The main change in the charitable income and expenditure figures result from Step Out Day Services being brought into the consolidated accounts.

The deficit on charitable activities continued again this year and increased from last year at £150,702. This increase included specific decisions by the Board to support some activities from designated funds after funding changes in 2015/16. This included befriending, volunteering and ongoing support for community work. The 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 income from trading activities remained relatively strong but did show a decrease on the previous year from ever increasing competition and changes and challenges in the charitable trading market. The future of trading is felt to be uncertain due to such challenges, which is a concern for the trustees to bear in mind in future planning. Similarly donations and legacies, always unpredictable, were lower than usual in the year. However, investment income was strong and with expert advice continued to represent a solid investment strategy. The charity's freehold property is a key functional asset and a key strand in the long term investment strategy.

Governance costs were reduced from the previous year and held at just below 2%. Volunteer value is conservatively estimated to be around £200,000, reduced due to lost services and lost volunteering opportunities but focus is on increasing this again in the future.

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 to adjust to the continuing changes whilst keeping a clear focus on enabling the delivery of effective support to local people now and in the future.

QUALITY

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 and quality service delivery. This includes ensuring good financial processes and reporting, comprehensive Health and Safety management, effective Human Resource management and a supported IT system. Work was undertaken in the year to ensure these infrastructure elements were efficient and effective. Focus in the year was also about ensuring they are appropriate to the needs of the changed organisation, and reviews are in place to ensure ongoing monitoring.

The focus on quality during the year was maintained to ensure it remained consistent through the many changes. Age UK Stockport continued to have success with externally validated standards which included the following:

International Standards ISO 9001 (Quality) was reassessed successfully by UKAS accredited assessors in January 2017 assuring quality at all levels through proactive audited procedures.

International Standard ISO 27001 (Information Security Management) provides the organisation with the structure to ensure 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 their privacy. It was also undertaken to be able to work positively with other agencies from all sectors. This was reassessed by UKAS accredited assessors and was successfully renewed for a further three years from September 2016.

The organisation successfully completed the full renewal to the new Investors in People standard in July 2016 which will last for the next three years subject to annual assessment. The Age UK Organisation Quality Standard is held and will be renewed in 2018.

In addition to organisational standards some individual services have to look to their own quality standards to ensure the best. The most challenging of these was to work to obtain Care Quality Commission registration for Support Services to develop its charged for services by offering a wider range of support in the future. This was being worked on at the year end and was achieved shortly thereafter. Unfortunately delivery has not yet commenced due to recruitment of staff issues but we look forward to developing this in 2018.

THANKS

As planned we have been able to make decisions again this year around investing from our own resources to support and maintain some services during the many and continuing changes. In the reporting year this included directly supporting volunteering, some community work, central costs and some direct delivery around befriending and social isolation. The **Feedback** (overleaf) is all important to keeping us delivering on our core mission

Thanks are due to all involved as people at all levels of the organisation have had to deal with unprecedented levels of change, uncertainty and challenge, whilst successfully maintaining good quality service delivery. The chief executive and senior management team have responded with flexibility 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 work with a value driven 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 board of trustees govern with considerable experience and dedication in exceptionally turbulent times.

Derek Caldwell, Chair of Trustees

Margaret J Brade, Chief Executive Officer

December 2017

FEEDBACK

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

Feedback is all important to help us know how we are doing and what we need to do better. We are proud and encouraged by the feedback we receive and the examples below are just some of the words used most consistently plus a very few illustrative quotes:

Excellent - Kind - Caring - Friendly - Professional - Informative
Understanding - Welcoming - Reassuring - Respectful - You listened!

“Having a person I could go back to was invaluable and gave me confidence for the future.”

“Your support made a difficult job really very easy.”

“Lovely staff - always helped or put you through or called you back – always.”

“Please keep doing what you do – and in the kind and professional way that you do it.”

“You helped lighten the load considerably and enabled us to manage what needed to be done.”

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Age UK Stockport is a registered charity 1139547 and company limited by guarantee 7413632. Age UK Stockport is an independent charity, partnered with the national charity Age UK and a member of the Age England Association;

Age UK Stockport Trading Limited is a limited company registered number 2956519. Age Concern Stockport Trading Limited is a trading company and subsidiary of Age UK Stockport and donates its net profits to that charity.

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