



**Working locally for
your wellbeing**

Annual Report

April 2017 to March 2018

Welcome to the Annual Report for the period April 2017 to March 2018.

Our commitments build on 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, and the mission of Age UK Stockport is to be working locally for your wellbeing. Everything we do is supported by our values; being a caring, community focused organisation that is connected, confident and creative.

The general economic climate has continued to translate locally to significant pressure on all statutory funding. This has combined with other pressures, again reflecting national trends, around hospital admission and discharge and particularly capacity to deliver social care. With the increasing influence of the new Greater Manchester devolution agenda and the growth of new local coordinating and transformation structures in health and social care it has all contributed to a complex, uncertain and fast changing environment to work in and to try and plan in. The Board and Management has continued to use an agile and emergent planning process to enable it to respond positively and also to be proactive.

Through continuing change the organisation remains 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 people can benefit from the reducing number of free services. This commitment remains through the organisation's continued involvement in the recently extended preventative services contracts and new collaborations around Hospital Discharge, all as detailed in the report.

Alongside this the organisation is working hard to reshape, diversify and develop in many areas, particularly in local communities. Also working with others wherever beneficial and balancing working innovatively as well as keeping well tried and tested services. At the time of writing new work around active ageing was beginning as an example of this, with more applications in the process of development.

The renewed brand partnership with the national Age UK is now two years into a five-year term. It continues to enable the organisation to benefit from being part of a larger nationally recognised brand whilst remaining strongly committed to its roots as a local and independent charity. It has also provided some opportunities for funding through Eon and other grants.

However, the Trading Agreement came to a premature and unexpected end in late March 2018 following changes at a national level that made it impossible for local trading to continue. This was a significant disappointment to the organisation, along with many other local Age UK's, as it was a loss of both independent income and a valued service to local people.

The year continued our strong commitment to quality through the considerable success of a number of externally assessed and nationally and internationally recognised quality standards. This included the Age UK Charity Quality Standard that focuses on governance in February 2018. These standards are now mature, established and play an important part in keeping the organisation efficient as well as effective.

The Trustees govern with considerable experience and dedication in challenging times. The Board went through change with the appointment of a new Chair at the last AGM in January. This was quickly followed by the untimely death of the previous long time Chair Derek Caldwell in February, who had intended to continue to actively serve the charity. Two new trustees were recruited in September 2017 and a further new trustee at the year-end so the charity Board can continue to have a strong membership to provide stable governance to the organisation.

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. The **Feedback** (back cover) is all important to keeping us delivering on our core mission.

AGE UK STOCKPORT SERVICE DELIVERY

All AUKS work is about supporting local people's wellbeing - to be well, safe and independent in their communities for as long as possible. Throughout the 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 previously reported the organisation's structure, financing and delivery have been subject to significant change following fundamental shifts across all aspects of the system. Consequently all service reporting has changed and in addition, data now has to be drawn from different sources as significantly more work is done in collaborations, networks and alliances. Although improving, data collection challenges continue to suggest there is still likely to be some under-reporting.

Overall data from the various sources show that AUKS continued to come into contact with a high number of local people - directly through services and support and through the work of the various collaborations we are involved with as detailed below. The total number was just over 20,000 with the number of new referrals higher than previous years at over 70%.

As an indication of the volume of work we can report some numbers counted through our own systems as follows: 9,744 people benefited through events and activities throughout the year; for example the newsletter, regular groups plus one off events such as the Older People's Day, the AGM and the annual Winter Warmth Day. Levels of activity (not including the TPA) showed 5,499 cases worked in the year leading to 7,547 home visits and over 31,845 telephone contacts.

The above numbers show activity. They do not yet indicate the significant positive impact that comes from many actions bringing additional benefits to the individual and also to their family and wider networks and community. Work is ongoing to better measure and report the benefits more fully and the social value that comes from the work of the organisation.

Highlights of Age UK Stockport work included the following:

INFORMATION & ADVICE is a core Age UK Stockport service. In the year 5,069 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 and if necessary through a home visit. The service also provides easy access to a comprehensive set of quality up-to-date fact-sheets and guidance sheets from Age UK and support with application for benefits and Blue Badges. As one example of service value the Age UK Stockport workers supported 4,154 benefit claims which brought in £1,726,403 of benefits claimed.

SUPPORT SERVICES provides a range of support services and activities to meet individual needs and situations. This work can be reported in many ways and the following are examples: **DIRECT CARE** and **CARERS SUPPORT** delivered 4,560 hours of support through trained and experienced staff to assist people as needed including 748 carers, and in addition support was provided to Carers in many ways across all of the organisations activities.

SOCIAL SUPPORT was also delivered in a variety of ways, enhancing people's sense of well-being through social interaction. This included a range of group activities such as singing groups, friendship groups and pub lunches, individual support and encouragement to engage with social and other activities. For example 960 people benefited from Tai Chi sessions in various venues and the Travel Club provided regular get-togethers as well as a program of trips throughout the year. Within the specific sphere of promoting positive mental health a trained worker supported 72 individuals directly through one-to-one case work and had over 1,500 regular contacts through over 100 valued Sound Mind groups sessions as well as supporting colleagues in this area.

REDUCING SOCIAL ISOLATION was an aim and an outcome of many of the work and activities; for example 14,525 personal and telephone contacts, 3,600 Befriending Services sessions with committed and experienced local volunteers.

AUKS SERVICE DELIVERY continued

HOSPITAL DISCHARGE support was delivered in many ways, reflecting our commitment to contribute in this important area. This included general AUKS work, specific delivery through the Wellbeing at Home Service and the new commissioned **BACK HOME** support delivered with the TPA, all combined to support 4,988 people to return home safely and also to help to avoid unnecessary readmission.

THE PLACEMENT SERVICE is located within Stepping Hill Hospital as part of the Integrated Transfer Team and provides experienced information, advice and support to people, families or carers when considering long-term care. It has a particular focus on Hospital Discharge and significantly increased its delivery again for another year with 713 people assisted in the year and 538 (up from 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. The contract continues into 2018.

Through Commissioned Services Age UK Stockport 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 with contributions from partners Stockport Homes, Signpost for Carers and Disability Stockport. The team provide short-term support or help to organise longer-term arrangements 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 assist with such as improving fuel efficiency and warmth, or advice on adaptations.

Overall Wellbeing at Home assisted 12,047 people with a range of practical support. For example, Easy Shop made 6,978 calls; there were 1,094 home / personal safety checks; and 315 practical resources for home safety were provided. Handy Help and Gardening delivered 3,863 actions made up of 2,726 handy help jobs, 324 gardening jobs and 813 support with tradesman.

An area of service delivery that increased dramatically in the year was complex work supporting people dealing with many different problems caused from having hoarding issues in their homes. This involved 153 people in the reporting year and was still increasing at the year-end.

THE PREVENTION ALLIANCE (TPA), originally called the Targeted Prevention Alliance, 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 Group working together with the commissioners Stockport Council. The TPA works with local people aged 18+ to improve their health and wellbeing, to provide a service to people that want to make change happen in their lives. This covers a wide spectrum of getting some information or advice to something that requires more time and support due to complexity. It is based on one-to-one asset based approaches but also actively encourages community engagement and support. During the reporting year the TPA received 1,054 referrals from 797 people over the age of 55, a third of which were self-referrals. This work covered a wide range of issues, including financial support, domestic abuse, housing, social wellbeing, and also different levels of support from drop in for information and advice to complex case work.

VOLUNTEERING - a special mention...

Volunteers continue to contribute exceptionally valuable time and energy to the Charity. At the year end the number of volunteers remained lower following the loss of services and associated volunteering opportunities. The contribution in estimated financial terms is under review as the situations have changed enough to require a new approach. The Charity remains committed to developing new and more volunteering opportunities again.

STEP OUT STOCKPORT

The associated company Step Out Stockport has provided day services and activities since 2014 and now forms part of these consolidated accounts for the second year. Step Out offers important services, highly valued by its members and the service is also included on the SMBC day services framework.

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 to ensure future sustainability, and a lot of detailed work was undertaken during the year focused on achieving these two outcomes. This included further development of effective policies and procedures and improved resource and supplier management to ensure best costs. This work continues, however it is acknowledged that there is still more to be done in establishing financial viability. A restricted fund is held within the Charity for Step Out and it is planned that once financial sustainability is established it will be the foundation for further development.

During the year expert Health and Safety input was maintained to ensure good and safe practice along with ongoing reviews of food, transport, entertainment and activities. The service offer was also reviewed and at the year end was being moved to meeting current needs more effectively through day sessions. The Centre offers a varied programme of activities and entertainment, meals and opportunities to socialise and make friends or just be quiet. It is also able to support people with high levels of need and enable carers to have much needed breaks. Activities at the Centre and at other localities included Singing Groups, Walking Football, Allotment Group, Pub lunches and more are continuously reviewed and developed.

During the reporting year Step Out supported 301 people through offering 9,312 day care sessions open Monday to Saturday year round apart from Bank Holidays. New ways of offering support are under continuous review.

AGE UK STOCKPORT TRADING

Trading remained an important strand of independent income during the reporting year, again contributing to the work of the Charity and also making a positive difference to the finances. Age UK Stockport's associated company Age UK Stockport Trading offered a range of Insurance, and other specially developed independent living products for the over 50s product market. The trading activities worked in a regulated environment under the Financial Conduct Authority and were dependent on nationally backed products via a trading partnership with Age UK Enterprises – a national organisation.

Unfortunately, in October 2017 issues at a national level caused a fundamental change in the national trading model that led to a significant review of the trading partnerships between Age UK Enterprises and local partners. Following this review over the winter of 2017 a large number of local partners, including all those in Greater Manchester, were forced to close their trading activities. Despite strenuous challenge to Age UK Enterprises from the Stockport Company Board and Management, Age UK Stockport Trading Limited reluctantly ceased trading on 31st March 2018. Staff were made redundant, although some were eventually successfully redeployed within the Charity. The Trustees seriously regret the loss of this service to local older people.

GOVERNANCE & FINANCIAL REVIEW

The charity has continued to achieve its objective of delivering support and services to older people throughout the reporting year. This has involved comprehensive risk management, clear and robust designated funds and commitment to appropriate use of reserves to support delivery as well as to secure future sustainability.

It remains increasingly important to be fully aware of the wider external environment in which the Charity works, as this continues to shift and change at a national and regional policy level and at a local commissioning level. The Charity has remained alert to the challenges and opportunities and has responded positively through maintaining a flexible emergent planning approach. This approach keeps the Charity grounded around its key mission and yet enables a higher level of openness to new ideas and flexible working at the same time.

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

The overall figures are higher than last year, more so in expenditure. However, the charity has continued to maintain similar percentages, including low Governance costs at 2%.

Income	%	£	Expenditure	%	£
Charitable activities	81	1,332,885	Charitable activities	81	1,441,410
Activities for generating funds	17	286,120	Cost of generating funds	17	303,489
Donations & Legacies	2	36,872	Governance Costs	2	36,723
Investment Income					
Total Incoming resources		1,655,877	Total resources expended		1,781,622

The deficit on unrestricted charitable activities continued again this year at £104,655. This deficit included specific decisions by the Board to support some activities from designated funds following significant funding changes, and included befriending, volunteering and ongoing support for community work. Reserves also contributed to central costs which remain increasingly hard to support from contracts or grants. This deficit was again turned into an overall surplus of £22,337 by the charity's proactive efforts locally through donations, trading and other activities.

The income from trading activities was significantly reduced following challenges in the market and more particularly following fundamental changes in the Age UK national model of trading as detailed below. The loss of independent income will be significant in future planning.

Donations and legacies, always unpredictable, remain relatively low compared to earlier years, an inevitable consequence of a long period of general austerity. Investment income contributed well and the Board manages the resources available for investment with advice from appointed experts. The Charity's freehold property is a key functional asset and a key strand in the long term investment strategy which overall remains relevant and strong.

The level of reserves has been maintained at six months of charitable expenditure following careful designation of funds to support service commitments and spending priorities. At the year-end the Charity was continuing to adjust to the many changes in its environment whilst keeping a clear focus on enabling effective support to local people now and in the future.

QUALITY

The commitment to quality was maintained throughout the year to ensure the quality of the organisation's delivery remained consistent through the continuing changes. Age UK Stockport again had significant success with highly regarded and externally validated standards, as set out below:

International Standards ISO 9001 (QUALITY): first achieved in 2012 this was successfully re-assessed by UKAS accredited assessors in January 2018 for a further three year period to 2021, subject to annual assessments in-between. A Quality Management Policy based on the core values governs and drives this work and quality is assured at all levels through comprehensively audited procedures. This work is led by the CEO and supported by a Quality Manager, and a Quality Team with workers from across the organisation ensure potential issues are proactively identified and all are dealt with to ensure continuous improvement and learning.

International Standard ISO 27001 (INFORMATION SECURITY MANAGEMENT): first achieved in 2012 this is currently in a three year cycle from a full reassessment by UKAS assessors in 2016 and a successful annual assessment was held in September 2017 and 2018. This 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 the protection of privacy. It also enables Age UK Stockport to demonstrate Information Governance compliance in working with other agencies from all sectors.

The INVESTORS IN PEOPLE award was maintained following full renewal to the new standard in July 2016. As with all quality standards this will be reviewed before renewal in 2019 to ensure it is still of relevance to the organisation in terms of time, investment and benefit.

The AGE UK CHARITY QUALITY STANDARD was successfully renewed for a three year term in February 2018, again through a comprehensive external assessment. As this standard focused on good management and governance it involved considerable involvement of management and the Trustees and the outcome was very successful.

In addition to organisational standards some individual services have achieved their own quality standards. This included the CARE QUALITY COMMISSION registration to enable charged for support services to have a wider offer that would include personal care. The standard was achieved and we are now planning the further development of this service in 2018 under the new name TANDEM CARE.

THANKS

Thanks are due to all those involved across the organisation as all have had to continue to deal with unprecedented levels of change and uncertainty whilst still successfully maintaining quality service delivery. The Chief Executive and Senior Management Team have continued to provide experienced and skilled leadership that has enabled the organisation to remain an integral part of local support to older people. Delivery of quality support has been achieved throughout the year by the skills and genuine commitment of the staff and volunteers, working with and alongside people to achieve positive outcomes.

Sue Carpentier Alting, Chair of Trustees

October 2018

FEEDBACK

Quality is checked through a number of feedback mechanisms which we are delighted to report again achieved a near 100% positive response. We are proud and encouraged by the feedback we receive and the following are just some of the words used most consistently on feedback forms and messages:

Excellent Kind Caring Friendly Professional Knowledgeable Reassuring
Understanding Respectful Responsive Supportive Effective Informative

We also receive many encouraging comments—as few examples are:

'I went from feeling scared and anxious about the future to having a positive plan.'

'Those I spoke to were so knowledgeable but also so caring and compassionate at a difficult time.'

'They were able to give advice and reassurance and were very professional.'

'I hadn't realised that Age UK Stockport did such great work and could provide support at what was a bewildering and confusing time....'

'Those I spoke to were always positive and upbeat and I felt they had much more understanding and knowledge of my situation.'

'I encourage all to use Age UK Stockport – you listened and I felt you cared.'

'Good is not high enough it was excellent—your worker was so calm, well informed and helpful.'

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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.

Step Out Stockport is a company limited by guarantee number 08881836, and an associated company of Age UK Stockport. Registered in England and Wales Registered Office: Commonweal, 56 Wellington Street, Stockport, SK1 3AQ.