

Age UK Wandsworth

Annual Report and Accounts 2013 / 14



Introduction

2013 / 14 was a very significant year for Age UK Wandsworth as we celebrated our 50th anniversary of working with and for older people in the borough of Wandsworth. We are delighted to have been able to provide valued and much needed services over this time. After 50 years our aim remains focussed on promoting the well-being and quality of life of local older people and to make life a fulfilling experience. From the surveys we conduct and from the informal feedback we receive, we know how much of a difference our services make to the quality of life for thousands of older people; maintaining their health and well-being and supporting them to retain or regain their independence.

To celebrate this milestone we held a series of events in the autumn. The first was an auction, hosted by Addison Gelpy from Criterion Riverside Auctions. We also held a special party for our volunteers and gave out achievement awards to recognise their amazing contribution. We ended the year with a celebration for many of our service users at our AGM. Throughout the year, we undertook fundraising activity and raised a record £24,000.

In line with our strategy, we secured funding to set up two new services this year:

1. Money Matters service is funded by Comic Relief and is a partnership project with Age UKs Sutton and Merton to help people to better manage their money. Further details of this service are on page 3 of this report.
2. We also established an Outreach Advice project as part of the Advice and Support service. This provides advice from a GP practice in Putney to improve access to information and advice for patients of that surgery. This allows GPs to link older patients into the crucial voluntary sector services of the area.

Other key highlights this year included:

- £800,000 was secured for Wandsworth older people in benefit gains
- provide information to over 9,000 personal callers to the office
- over 5,500 visits were made by staff and volunteers to people's homes
- reached over 5,200 clients

Further achievements are outlined in this report. For most of our services we rely on the commitment of our 200 volunteers who play a vital role in every aspect of the organisation's work. Please see page 6 for details of how volunteers help. We would like to thank all our wonderful staff, trustees and volunteers as without them we would not be able to operate our charity effectively and deliver these much valued services.

A summary of our accounts is provided on pages 7 and 8. We want to thank all our funders, in particular Wandsworth Clinical Commissioning Group who provided 38% of our income, Wandsworth Borough Council, 35% and Age UK, 9%.

We look forward to 2014 / 15 and to developing and growing our services in response to local need.



Peter Lloyd (Chair) and Rachel Corry (Chief Executive)

What we do – our services



Age UK Wandsworth provides a range of services to improve the well-being of people aged 60-plus living in the borough of Wandsworth. We have detailed the services below.

Information and Advice

Age UK Wandsworth aims to improve the quality of life of older people and their carers through the provision of independent information, advice and support.

1. The **Information** service is often the first point of contact to the organisation for visitors and telephone callers. It provides initial answers to a wide range of enquiries and signposts to other organisations and services where appropriate. This year the service provided relevant information to over 2,000 visitors to the office and dealt with over 7,000 telephone callers.
2. The **Advice and Support** service provides more in depth advice and support on a range of issues. These include helping people claim the benefits to which they are entitled, housing options, transport, health and disability, leisure and social activities. This year the Advice and Support service:
 - provided 707 clients with advice on nearly 2,500 issues.
 - delivered 2,229 advice sessions and carried out 212 home visits
 - helped to secure approximately £800,000 in additional benefits for older people

Clients can call in for our morning drop-in on Monday-Wednesday, 10am to 12pm or book an appointment for advice in the office or for a home visit. In addition, we also offer free specialist advice surgeries for tax enquiries and a hearing aid clinic, 61 people benefited from these surgeries.

3. The **Your Care Your Choice** service provided information and support to help older people to arrange their own personal or social care. This year 512 older people or their family members were given information and support to help them access these services.

Advice and Support case study

Mrs D's son contacted the Advice and Support service to ask for help for his mother who is 83 and lives alone. He was very worried about her as her health had deteriorated in the last year and she was finding it increasingly difficult to get out of the house. The advice worker arranged to visit her at home and we helped her to claim Attendance Allowance which she has now been awarded at the higher rate of £81.30 per week. We also did a means tested benefits check to identify her entitlement to Pension Credit, Housing Benefit and Council Tax Reduction. We also gave advice and information about how to ask for a social services assessment, personal alarms and local activities and services. We told her about Wandsworth Community Transport shopping shuttle and also arranged for grab rails to be fitted by our Handyperson service. Following a social services occupational therapy assessment she has also been given a bath board to help her to get in and out the bath more easily. Mrs D was pleased to hear that she was getting all the money and support she was entitled to and some unexpected help to. She is now able to live life more independently without the difficulties she had before.



4. The **Money Matters** service is a partnership project with Age UKs Sutton and Merton to help people to better manage their money. The service provides information, advice and support on making savings by finding the best energy tariff, increasing income and avoiding scams. The project started in April 2013 and 213 clients benefited in the first year; 148 from workshops and 65 through 1-1 sessions.

5. The **Community Ward** service provides voluntary sector support to Wandsworth's Community Wards, a multi-disciplinary health and social care team supporting patients in their own homes to prevent hospital admissions. Age UK Wandsworth helps identify the needs of patients that can be met by the voluntary sector and ensures that they access the appropriate services. This year we supported 92 patients to access voluntary sector services.

6. The **Carers' Support** service aims to increase choice and control for carers, help them to maintain their health and well-being and sustain them in their caring role. It provides support to older carers or those caring for an older person, including one to one support, information and advice, liaison with other agencies, group activities, day trips and a volunteer befriending and support service. In 2013/14 the service provided support to 232 carers.

Advice and Support case study

Mrs T contacted the Advice and Support service to ask for help as she was struggling on her income. She was living at home with her adult daughter and as a result of her daughter living there a non-dependent deduction was being made from her Housing Benefit and Council Tax Support. The advice worker did a full benefits check to identify whether she was receiving her full entitlement to benefits. As she was experiencing arthritis and kidney failure as well as other long term health problems which were affecting her personal care needs we advised her to apply for Attendance Allowance. The advice worker arranged to visit her at home to complete the application form. At the home visit the advice worker noticed that Mrs T could not get up and down stairs very easily and as a result was spending most of her time upstairs. The advice worker gave advice about housing options and assisted her to make an application for a Wandsworth

Council housing transfer for more suitable accommodation. We also gave advice about asking for an occupational therapy assessment from social services. Mrs T also received help from the Age UK Wandsworth Handyperson service to provide and fit grab rails on the landing and in the bathroom. Mrs T's application for Attendance Allowance was turned down so the advice worker helped her to request a mandatory reconsideration of the decision. Attendance Allowance was eventually awarded at the higher rate and backdated to the date the form had been requested. Now that she is getting Attendance Allowance there are no non-dependent deductions from her Housing Benefit and Council Tax Support, giving her greater income, making it a lot easier for her to manage her outgoings and giving her the ability to cope with unexpected expenses. She has also been rehoused into more suitable accommodation where she is very happy and has greater peace of mind for the future.

Practical Support at Home

Age UK Wandsworth runs a number of services aimed at supporting older people within their own home to enable them to live independently and to maintain their health and well-being. These include:

7. The Be-a-Friend service matches volunteers with housebound older people to lessen the impact of social isolation. We offer regular volunteer visits, a telephone support service and birthday and Christmas cards. The service also promotes independence and better access to social, health and other services through the provision of information and support when required. During the year:

- 303 older people were supported through the service, including 84 older people who received companionship from volunteer visitors
- 231 people received telephone befriending services and birthday/christmas cards

8. The Out and About service provides volunteers to accompany housebound older people, or those at risk of becoming housebound, with assisted trips out. The service itself is coordinated by volunteers. This year we arranged 559 trips out for older people, enabling them to get out of the house, for example, to go to the doctors, the shops or a local park.



9. The Handyperson service undertakes a range of practical tasks to reduce the incidence of falls in the home, facilitate a timely discharge from hospital and assist those unable to carry out minor repairs and adaptations themselves. The service fits grab rails and stair rails to help people move around the home and also fits key safes to enable carers to visit. In 2013/14:

- 1,229 clients were helped
- 2,981 jobs were carried out and
- 1,745 home visits were made

10. The Garden Partners service matched older people who needed help to manage their gardens with volunteers who wanted outdoor growing space. Both parties planned and developed the garden space and shared the produce grown. The scheme involved individual garden owners and communal gardens and in total 100 older people benefited from this service during 2013/14. Unfortunately funding for this service ended at the end of March 2014.



11. The **Shopping** service provides internet grocery shopping for those who do not have access to a computer and arranges shopping deliveries to the door through supermarket online services. Clients register with a supermarket of their choice and Age UK Wandsworth then takes the shopping order over the telephone at regular, agreed times. The supermarket delivers the shopping at a date and time to suit the customer. This year 96 people used the shopping service and 1,877 orders have been processed, enabling people to have greater choice and control over what they buy as well as encouraging greater independence.

12. The **Home from Hospital** service provides practical support to people when they are discharged from hospital for up to six weeks. The service is delivered by volunteers and the aim is to prevent people being re-admitted to hospital and to assist with the smooth transition from hospital to home. During the year 55 people have been supported by volunteers aiding their recovery and helping to improve their confidence in managing to live independently at home again.

Shopping service case study

Following a hip replacement five years ago, 90 year old Kathleen became housebound and unable to go out. Kathleen lives alone and has no family locally. In fact her closest family member is an 84 year old niece who lives near Brighton. Kathleen has used the shopping service at Age UK Wandsworth every week since April 2009 and considers this to be an absolutely 'essential service and really has no idea how she would manage without it'. Apart from the practical aspects of having her shopping delivered Kathleen also said that knowing that her shopping was going to be brought to her house and carried into her kitchen removed any anxiety and worries that she may have had about how she would get her shopping. Having the service has improved her situation no end. Kathleen also said that she likes and appreciates the regular contact and never feels that she is a nuisance. We can assure her that she never is.

Handyperson service case study

Mr T, aged 76 was referred to the Handyperson service by an occupational therapist to fit grab rails in his home. We fitted the rails and also noticed that a radiator was falling off the wall and causing a trip hazard. We refitted the radiator while we were there as it could have fallen off the wall possibly causing injury or damage to the property. Mr T was delighted with the grab rails as they made it easier for him to move around his home and meant that he did not need to hold onto other things such as the radiator. He was very happy that we had spotted and fixed the radiator before it became a bigger problem.

Volunteering

Volunteering is a great way of giving something back to your local community and making a positive difference to other people's lives. Volunteers play a very important role at Age UK Wandsworth and help us to deliver the various projects and services which support older people and their families. We always need volunteers and here are some of the ways in which volunteers help older people in Wandsworth:

- Visiting older people in their homes for friendship and company
- Providing support for carers and giving them a break from caring
- Accompanying older people for short trips and outings
- Helping at dementia cafes
- Raising much needed funds in sporting events and fundraising activities
- Sharing the maintenance of older people's gardens
- Providing office support, reception duties and advice and support
- Supporting people after coming out of hospital

If you would like to find out about volunteering at Age UK Wandsworth, please call **020 8877 8940** or email **volunteering@ageukwandsworth.org.uk**.

Fundraising

Thanks to all our dedicated fundraising volunteers who helped raise a record total of £24,440. This year people got involved in a variety of activities to raise funds:

St Anne's, St Faith's, Allfarthing and Swaffield Churches joint collection at carol services – total raised £4,143

50th Anniversary Auction Event – total raised £2,792

London marathon – total raised £2,715

Royal Parks Half Marathon – total raised £2,581

RideLondon-Surrey100 cycling event – total raised £1,749

WBC Sheltered Housing schemes fundraising activities – total raised £1,487

British 10k runners – total raised £1,219

Pub quiz – total raised £907

Café Bridge – total raised £800

Tough Mudder challenge – total raised £691.25

St Andrew's Church Earlsfield – total raised £500

Choir event at Balham – total raised £330

Selling Christmas Raffle Tickets – total raised £120

Ladies' fundraising supper – total raised £50

Heathfield Court Care Home fundraising event – total raised £48

This combined with other fundraising donations gave us our amazing total.

We really appreciate all your hard work and support - Thank you!



Statements of financial activities for the year ended 31 March 2014

| | Unrestricted funds £ | Restricted funds £ | Total funds 2014 £ | Total funds 2013 £ |
|---|----------------------------|--------------------------|--------------------------|--------------------------|
| Incoming resources | | | | |
| <i>Incoming resources from generated funds</i> | | | | |
| Voluntary income - | | | | |
| Donations, fundraising & legacies | 38,538 | 100 | 38,638 | 76,998 |
| Shop income and commission | 24,210 | | 24,210 | 27,174 |
| Interest receivable | 1,493 | | 1,493 | 1,701 |
| Other income | 7,557 | 1,468 | 9,025 | 14,117 |
| <i>Incoming resources from charitable activities</i> | | | | |
| Grants & contracts | 8,755 | 514,820 | 523,575 | 592,494 |
| Total incoming resources | 80,553 | 516,388 | 596,941 | 712,484 |
| Resources expended | | | | |
| Costs of generating funds: | | | | |
| Volunteers expenses | 156 | 787 | 943 | 1,514 |
| Fund raising | 9,251 | | 9,251 | 6,417 |
| Publicity | 41 | 645 | 686 | 900 |
| Charitable Activities | | | | |
| Enabling older people | 73,680 | 617,354 | 691,034 | 647,123 |
| Governance costs | 1,566 | 6,386 | 7,952 | 6,274 |
| Total resources expended | 84,694 | 625,172 | 709,866 | 662,228 |
| Net incoming/(outgoing) resources for the year | - 4,141 | - 108,784 | - 112,925 | 50,256 |
| Transfers between funds | 6,940 | - 6,940 | | |
| Net movement in funds | 2,799 | - 115,724 | - 112,925 | 50,256 |
| Total funds as at 1 April 2013 | 258,073 | 165,916 | 423,989 | 373,733 |
| Total funds at 31 March 2014 | 260,872 | 50,192 | 311,064 | 423,989 |

Balance sheet as at March 2014

| | 2014 £ | 2013 £ |
|--|----------------|----------------|
| Current assets | | |
| Debtors | 89,841 | 31,799 |
| Cash at bank and in hand | 295,941 | 438,921 |
| | 385,782 | 470,720 |
| Creditors: amounts falling due within one year | 74,718 | 46,731 |
| Total net assets | 311,064 | 423,989 |
| Funds | | |
| Unrestricted | 260,872 | 258,073 |
| Restricted | 50,192 | 165,916 |
| Total funds | 311,064 | 423,989 |

Statement of income for the year ended 31 March 2014

| Voluntary income | Unrestricted funds £ | Restricted funds £ | Total 2014 £ | Total 2013 £ |
|--|----------------------------|--------------------------|-----------------------------|-----------------------------|
| General donations | 7,218 | 100 | 7,318 | 51,372 |
| Fundraising | 24,114 | | 24,114 | 15,307 |
| Legacy | 7,206 | | 7,206 | 10,319 |
| | <u>38,538</u> | <u>100</u> | <u>38,638</u> | <u>76,998</u> |
| Incoming resources from charitable funds | Unrestricted £ | Restricted £ | Total 2014 £ | Total 2013 £ |
| Wandsworth Borough Council | | | | |
| Core grant | | 43,813 | 43,813 | 57,097 |
| Handyperson | | 41,027 | 41,027 | 75,537 |
| Your Care Your Choice (Help and Care at Home) | | 20,000 | 20,000 | |
| Cold Weather | | | | 19,216 |
| Be a friend | | 53,739 | 53,739 | 52,685 |
| Widening participation | | | | 5,955 |
| Shopping | | 42,113 | 42,113 | 42,820 |
| Wandsworth Clinical Commissioning Group | | | | |
| Garden Partners | | 9,500 | 9,500 | 61,500 |
| Home from Hospital | | 47,000 | 47,000 | 48,000 |
| Handyperson | | 77,580 | 77,580 | 55,000 |
| Advice and Support | | 58,300 | 58,300 | |
| Cold Weather | | | | 15,884 |
| Community Ward | | 36,350 | 36,350 | 29,700 |
| Age UK | | | | |
| Advice and support | | 14,180 | 14,180 | 15,000 |
| Health and Social Care Volunteering Fund / Your Care Your Choice | | 31,426 | 31,426 | 21,913 |
| Text Santa | | 1,980 | 1,980 | |
| Other | 8,755 | | 8,755 | 10,803 |
| Big Lottery | | | | |
| Advice Service Fund | | | | 70,000 |
| Advice Services Transition Fund | | 10,050 | 10,050 | |
| Comic Relief | | | | |
| Money Matters | | 24,878 | 24,878 | |
| Other grants | | | | |
| FirstStop-Housing Advice | | | | 6,500 |
| Alzheimer's Society | | 2,384 | 2,384 | 2,384 |
| London and Quadrant | | | | 1,000 |
| London Community Foundation | | | | 1,500 |
| Age UK London | | 500 | 500 | |
| | 8,755 | 514,820 | 523,575 | 592,494 |

Acknowledgements

Thanks to all our staff

Advice and Support Coordinator - Philippa Burns
Advice Worker - Tom Goddard
Be-a-Friend Coordinator - Melanie Lawrie
Carers' Support Coordinator - Sue Reardon
Chief Executive - Rachel Corry
Community Ward and Marketing Coordinator - Charlotte Allen
Executive Assistant - Zoe Daniel
Finance Officer - Shanshan Xu
First Stop Information - Marianne Wigren / Vivien Yalcin
Fundraising Coordinator - Hicky Kingsbury
Garden Partners Coordinator - Sue Sweeney
Handyperson Coordinator - Rebecca Ruff / Rhian Jenkins
Handyperson - Pawel Worek & Yvonne Neufville
Home from Hospital Coordinator - Pamela Hatton
IT support - Bob Griffin
Money Matters Coordinator - Jean Kennedy
Outreach Advice Worker - Ian Adams
Shopping Service Coordinator - Catherine Waters
Shopping Service Administrator - Helen Fearnough
Volunteer Coordinator - Kirsty Walker
Your Care Your Choice Coordinators - Nizam Chowdhury & Lorraine Colnaghi

Thanks to our trustees

Peter Lloyd, Chair
Pam Amos, Vice-Chair
Philip Francis, Treasurer
Jenny Alexander
Jeremy Ambache
Nathalie Gibson-Wilson
Liz Halksworth
Leigh Jones
Tony Tuck
Barbara Willerton

Thanks to our funders

Wandsworth Borough Council
Wandsworth Clinical Commissioning Group
Age UK
Big Lottery Advice Services Transition Fund
Health and Social Care Volunteering Fund
Comic Relief
Alzheimer's Society
Young and Co
Waitrose Community Matters
Residents Journal
Realm Estates
Age UK London

We would also like to thank all those individuals who made personal donations to support our work with older people.



Age UK Wandsworth staff team

Accountant

Kris Mehnon

Auditors

Myrus Smith, Chartered Accountants
Norman House, 8 Burnell Road
Sutton, Surrey SM1 4BW

Banks

CAF Bank Ltd
HSBC

How you can help

We value your support and it really does make a difference to the lives of older people in Wandsworth. There are several ways you can help; you could give us your time through volunteering, or you could take part in a fundraising activity. We have also listed some other simple ways you can support our work financially.

Making a donation

You can make a one-off donation of cash at our office, by cheque or postal order, or through our website, www.ageukwandsworth.org.uk. Please make cheques payable to Age UK Wandsworth, 549 Old York Road, London SW18 1TQ and send it to us (please do not send cash through the post).

Regular donations can help us plan our services better. You can make contributions directly from your bank account by direct debit or standing order. Payroll giving donations are another way to give regularly and are deducted from your salary before tax, so for every £1 you give it will only cost you 80p. If you are a higher rate tax payer it will only cost you 60p. If you receive your salary through PAYE and would like to give to us this way please speak to your employer.

Gift Aid is the government scheme which allows charities to reclaim the basic-rate tax already paid on any donation. All you have to do is complete a declaration (available from us) saying that you pay enough tax to cover what the charity will reclaim from HM Revenue & Customs. For all taxpayers, donations gain an extra 25p for every £1 donated, at no extra cost to the donor. Higher-rate, 40%, taxpayers can personally claim back 25p for every £1 they have donated, through their self assessment tax return or by contacting HMRC and asking them to amend their tax code. They can choose whether to keep this extra income or give to a charity. For more information, please contact **Shanshan Xu** on **020 8877 8951**.

Leaving a gift in your will

Leaving a gift in your will once you have provided for loved ones is a valuable way of making a long-lasting contribution to our work. It would help us to sustain and develop our existing services and support those who are in need in our community. If you would like to find out more about how you can help Age UK Wandsworth through a gift in your will, please contact **Rachel Corry** on **020 8877 8950** or rachel.corry@ageukwandsworth.org.uk.



Fundraising

Raising money can be both fun and challenging and makes a vital contribution to our services. Sporting challenges, pub quizzes, raffles and cake sales are just some of the ways that you can help to raise money. To find out how you can get involved or to discuss fundraising ideas of your own, please contact **Hicky Kingsbury** on **020 8877 8959** or hicky.kingsbury@ageukwandsworth.org.uk

50 Years of Age UK Wandsworth

We started life as the Wandsworth Old People's Welfare Council in 1963 and the charity was registered with the Charity Commission in 1965. Following the formation of the national Age Concern charity in 1971, Wandsworth Old People's Welfare Council gradually became known as Age Concern Wandsworth during the 1980s and formally changed its name in 1991 (although it was not registered until 1998).

The charity has found a home in many parts of the borough over the years including Battersea, Earlsfield, Balham, Tooting and the Southside shopping centre (the Arndale centre as it was known then) before we moved to our present location in the heart of Wandsworth Town.

One thing that has remained constant over all these years is our purpose to promote the well-being of older people living in the borough. From a staff of three in 1980, the charity has grown as its services expanded and now employs 21 people.

Information and Advice, and Carers' Support were the earliest of the

services that continue today, introduced in the early 1980s. In 1987 the Be-a-Friend service was set up to provide volunteer visitors for housebound people and in 1998 the Handyperson service began to provide help with practical DIY-style tasks around the home.

At the national level, Age UK was formed in 2009 from the merger of Age Concern England and Help the Aged. In September 2011 we changed our name once more, becoming Age UK Wandsworth, to join the growing Age UK family.

We remain an independent, local charity and today our services include:

- Information advice and support
- Support for carers
- Opportunities to make friends
- Activities and outings
- Assistance in arranging personal and social care
- Help with minor repairs and adaptations
- Shopping deliveries to your door
- A garden share scheme
- Home visiting
- Support after coming out of hospital

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