



Annual Report 2016 - 2017

Introduction

Age UK Lindsey is an independent charity based in Horncastle, Lincolnshire. We are a Brand Partner of the Age UK charity.

Age UK Lindsey provides services in the Lincolnshire district council areas of East and West Lindsey, which takes in the coastal areas of Skegness to Mablethorpe in the east, Gainsborough in the west, Louth in the north and close to Boston in the south.

The Trustees, staff and volunteers work together to deliver services, which will benefit older people and their families.

Our seven key priorities

- ◆ Provide older people with information and advice on a range of important topics such as benefits, care, housing, local services and support in retirement.
- ◆ Support older people to remain living independently at home.
- ◆ Develop our community activities and engagement to achieve greater social inclusion for older people.
- ◆ Offer support to older people and their families both during a terminal illness and following the death of a loved one.
- ◆ Ensure Age UK Lindsey remains an inclusive and independent voice for older people in the area. Driving change on their behalf and ensuring their contribution is listened to and valued.
- ◆ Support older people who are isolated and vulnerable by providing companionship, practical support and signposting to other services.
- ◆ Support older people in the Lindsey area to continue learning, both for their own personal development and because it helps them to continue to play an active part in society.



Mission Statement

To promote the wellbeing of older people and help make later life a fulfilling and enjoyable experience.



Chief Executive's Foreword

I am pleased to present the 2016/17 Annual Report for Age UK Lindsey.

It has again been an incredibly busy year as we have strived to improve and extend services for our beneficiaries across both East and West Lindsey.

In my message last year I talked about our new three-year Strategic Plan and said we would *'build upon our mission, values and key priorities and set out a broad vision for the charity, which would see an expansion of the services and activities, we deliver'*.

To some extent at the end of the 2016/17 financial year, we are at an early stage with regards to our Strategic Plan. However, we are already seeing an increase in service delivery and I would expect to see that increase to continue over the next twelve months.

Our Charity Shops have continued to perform very well, bringing unrestricted income into the charity, which is then spent on services such as Information and Advice and Befriending. Age UK Lindsey's shops provide our charity with a local community presence and a 'hub' for delivering services, as well as supporting the local economy and providing jobs and volunteering opportunities. Over the next twelve months we are hoping to increase the number of shops we have and this will again support any expansion of services.

Our charity continues to respond to the changing landscape we face, as government policy, the economic climate and the changing needs of our beneficiaries mean that we need to adapt, innovate and work in partnership. By innovating and building good partnerships with other local organisations, we have received funding to support both our Lunch Clubs and Befriending Service from the Talk, Eat and Drink (T.E.D) partnership.

Our Annual Report shows the range of our work and illustrates the tremendous services we deliver and as Chief Executive Officer of Age UK Lindsey, I would like to take this opportunity to thank our Trustees and everyone involved in the governance of our charity as well as the executive and wider management team and all staff working across East and West Lindsey.

I would also like to thank our incredible volunteers who give so much and are so passionate about delivering the best services possible to older people in Lindsey. We have an extraordinary team of people working for our charity and every day they make sure we continue to bring the best services possible for older people. They are the people driving our ambitious strategy, delivering services and trying to make later life a fulfilling and enjoyable experience for older people.

I would also like to thank all of our members and donors and I want you to say that every sponsored run, every cake sale and every donation to our charity contributes to making someone's life better.

Together our Trustees, staff, volunteers, donors and members are making a difference and we couldn't do what we do without you all. Thank you!!

Andy Storer

CEO, Age UK Lindsey

Chairman's Foreword

I have been Chairman since October 2016 and in that time, I have been very proud of the commitment and dedication our staff and volunteers have shown in providing support for older people in the Lindsey area.

The past twelve months have seen another year of '*change and challenge*' for the UK charity sector, which has meant that it has been even more vital for Age UK Lindsey to continue to be a robust and viable organisation, offering the services and activities older people need, while looking at opportunities to be self-sufficient and financially stable.

As a charity we continue to maintain a range of activities and services which make a huge difference to beneficiaries and their families. Two major successes for us this year have been the performance of our charity shops, which have gone from strength to strength, and also the increase in the number of hours we offer to vulnerable older people through our Befriending Service. These successes add to other magnificent work, including our Information and Advice services, and all our other forms of support, help and signposting, delivered by our committed teams. All too many to list.

Our Executive and wider Management team, led by our Chief Executive Andy Storer, have worked with the Board to develop a strategy that will take us forward, ensure we remain fit for purpose and continue to reflect the values we uphold. There are many challenges ahead but I am incredibly grateful for all the hard work and commitment shown by our staff and volunteers. Once again I would like to take this opportunity on behalf of the Board to express our thanks to all those who contribute to the work of both the charity and our trading activities. Without you we would not be as dynamic, flexible and responsive as we have been over the past year and you ensure we maintain our values as we provide the services required to enhance the lives of all who use our resources and services.

I would also like to express, on behalf of Age UK Lindsey Board, our thanks to individuals and organisations who continue to support us in various ways such as through individual donations and legacies; partner funding; using our trading products; inviting us to join groups, working parties and committees, and positively engaging with us. Everything you do that supports Age UK Lindsey, contributes to how we meet the needs of older people in our area.

Many thanks

Hugh Thomson

Chairman, Age UK Lindsey



Facts and Figures

Community Activities In the first two months of the Lunch Club project, four Lunch Clubs were supported to increase the number of diners
40 diners at the Woodhall Spa Lunch Club were supported

Fundraising 6,000 Big Knit hats were knitted, raising £1,500
982 hats knitted by a knitting group in Louth
£636 raised in Christmas Card sales

Independence At Home Delivered 38,466 hours of service in the home and garden
Catered to the needs of 472 clients, on average, each month
Provided support to 18 palliative clients, on average, per month
Employed 96 Home Support Assistants, Gardeners and Handy Persons
Area coordinators covered 7,555 miles on visits

Information & Advice Helped 5,582 older people claim much needed income
Obtained almost £3 million in unclaimed benefits
Received in excess of 9354 enquiries over the year

Shops A total income of £504,220.22
Additional £20,000 in Gift Aid claims

Volunteering 21,391 volunteer hours
£154,015 added value to charity
111 volunteers at start of year, 125 at end of year
22 Befriending Volunteers as a result of the No One campaign

Befriending 2000 hours of befriending support across both East and West Lindsey
40 older people benefitted from the service
Increase of 23 people
41 dedicated volunteers

Community Activities



Lunch Clubs

In May 2016 we opened the Age UK Lindsey Community Lunch Club in Woodhall Spa. We served a hot two-course meal, cooked on the premises, to around 40 people on a weekly basis.

Pop-Up Events

During the summer of 2016 we took the charity services out to our shops with our Chari-Tea Events.

We held pop up events in Gainsborough, Spilsby and Market Rasen offering information and advice, charity services and refreshments.



Summer Festival

In June 2016 we held our Summer Festival in Woodhall Spa where over 150 guests attended. Our guests were entertained by a singer with a varied repertoire.



Coffee Morning

We hold a weekly coffee morning in Horncastle, which is well attended by locals and helps raise funds for Age UK Lindsey services.



Membership

Age UK Lindsey introduced a 'revamped' Membership scheme, encouraging people to be either Full Members or Associate Members of our charity. Full Members pay £10 and receive a range of benefits, including the right to vote at our AGM and a quarterly newsletter. Associate Membership is free, and members also receive the newsletter, but do not have voting rights.



The Big Knit

The Big Knit was run later in the year, as part of a larger rolling campaign for early 2018. We had huge support again from our membership and received some amazing creations to support the charity.

We also received some amazing knitted hats from external knitting groups and businesses. In particular the ladies from M&G in Louth knitted us an incredible 982 hats.

Christmas Cards

We sold Christmas cards at local events and groups, and also offered an ordering system to older people who weren't able to get out and about. They proved very popular and we intend to sell them again in 2017/18.

Sills & Betteridge donate £800 to Age UK Lindsey

Age UK Lindsey received a generous donation of £800 from Lincolnshire-based solicitors, Sills & Betteridge. Each year the practice nominates a charity to support through corporate fundraising, and Age UK partners in Lincolnshire and Nottinghamshire were chosen as beneficiaries of the funds raised through cake sales, raffles and sponsored sports events.

Winter Warmer Packs

From the fundraising efforts of our Horncastle Coffee Morning ladies, Age UK Lindsey was able to hand out a number of Winter Warmer Packs and give our most vulnerable older people in the Horncastle community. The packs contained a scarf, thermal socks and thick gloves, a torch, hand warmer and vital supplies of tea bags, biscuits and UHT milk. The idea was to ensure that vulnerable older people who might be suffering from fuel poverty were not cold during the winter.



Independence at Home



“She is the best worker I have ever had and is very thoughtful.” **MR S**

Services

During 2016-17, the Independence at Home team continued to provide a range of vital support services that enabled people to live more independently in their own homes. Referrals were directly received from clients, their families and external agencies and partnerships.

Our dedicated Home Support Assistants were in high demand providing a range of light domestic tasks, including cleaning and light food preparation, shopping and collecting pensions, to Spring cleaning and tidying up.

“From what mum has told me, she is an absolute godsend, I can’t thank you enough for all the help and care you have given her.” **MRS F**

Gardening Service

Throughout the year our Gardening Service has continued to be provided by a handful of committed and hardworking gardeners who are interested in helping people to get a “smile out of their garden”.

E.ON Project

During the winter months an E.ON funded project to complete Home Energy Assessments was carried out. Assessors from Age UK Lindsey successfully completed **100** home visits in which clients benefitted from free advice and free energy saving equipment that helped them stay warm and well in the colder months.

Partnership Working

T.E.D Project

In January 2017 we launched the T.E.D Lunch Club Project in East Lindsey. This project, funded by Talk, Eat and Drink (T.E.D) East Lindsey, offers two elements of support.

It offers support to help an individual to access a local lunch club, including working with transport providers. We also offer support to lunch clubs on a variety of issues and best practice.



“So good and kind, mum adores her and listens to her. Diplomatic, nice and I don’t have to worry and I get to spend more time caring for my mum.” **MRS J**

Palliative Care

Since 2007 Age UK Lindsey has worked in partnership with Louth and District Hospice, and throughout 2016-17, we continued to deliver valuable support to palliative clients.

Funding from the Hospice has provided **1,300** hours of home support. Our considerate Home Support Assistants told us that they loved their job and the feeling of making a difference, by supporting clients and helping to enable family together time.



**louth & district
hospice limited**
compassion in action

Information and Advice



“We did not think we were eligible for any help, because we felt there were other people much worse off than ourselves.

You made us realise that help was available, we are grateful for the support and peace of mind the extra daily demands can be met.” **MR HIND**

Telephone Enquiries

From April 2016 to March 2017, the Information & Advice Service received **10,894** telephone enquiries and provided **1,161** outreach visits across the East and West Lindsey areas.

“I would like to thank the team in Louth for helping me apply for extra money. I can now get help with my shopping and visits outside, without worrying about paying the costs.” **LOUTH ACCESS CENTRE CLIENT**

Access Visits

The service dealt with **1,517** Access Centre visits at both the Horncastle and Louth sites. The service also provided advice to **763** older people, who wanted support to remain living independently at home.

Staffing

The team has expanded its service by employing an I & A Assistant to support the Horncastle Access Centre and a West Lindsey based I & A Officer. The two new roles expanded the service provision by **32** hours per week.

Surveys

The service had over **300** impact surveys returned from satisfied clients.

Volunteers

The increase of volunteers offering their time and support due to the Age UK No One Should Have No One campaign enabled us to provide the service to a greater number of people and ensured we could match people quickly once a referral had been made.

All of our volunteers received an induction into the charity and the service, and were trained locally with other new volunteers.

Service Users

Almost everyone we matched was positive about the service. We had a donation made by a daughter, who was very pleased with the service and the outcome for her father.

Even people reluctant to have the service at first, commented on how much they enjoyed their volunteer's visits.

We had one client who was very low prior to visits. She called the office to say how much better she felt, and that as a result she had booked a holiday.

Another client started to attend the Thursday coffee morning as a result of feeling more confident and ready to socialise, since having a weekly visit.



Shops

Shops

Our retail shops are a valuable resource, and situated in the heart of our communities provide a means through which we can promote our valuable services, as well as raise unrestricted income for the charity. This income is then used to fund core charity services, such as Information and Advice, and Befriending.

All shops performed well in 2016-17 and donations increased in quality and quantity. Staff received training predominantly in merchandising, stock control and stock rotation, in order that the customer's shopping experience was enhanced by ever changing, eye-catching displays of good quality merchandise.

Gift Aid

Staff and volunteers received additional training on pricing and Gift Aid in order to increase the average sale price and Gift Aid contribution.

As a result of the additional training, the shops' combined turnover increased by over **14%** on the previous year, and the Gift Aid contribution claim increased by **41%**. The highest increase in both turnover and Gift Aid contribution came from the Gainsborough shop due to a refurbishment and the introduction of a new Shop Manager.

Stock Collection

Our stock collector completed a PAT Tester training course and this increased our electrical sales by **£3,000** due to increased customer confidence in electrical products.



Volunteering

Volunteer Awards

To thank all our volunteers for their valuable support, we gave each team a small budget to spend on a social get together in their local area.

We improved our Volunteer of the Year Awards by adding a specific criteria and encouraging more nominations. Beverley Shinn was awarded our Volunteer of the Year for her commitment to the Horncastle shop, and Steve Gray was awarded the President's Award for a new volunteer in recognition for his support to the office team.

“It’s broadened my horizons and made me a lot happier in myself and it’s great meeting people.” **BARBARA**

No One Should Have No One Campaign

The No One Should Have No One campaign was a national one to draw attention and drive volunteering to help end loneliness. The three month campaign was promoted via social media and our website and through local press releases. We had a huge response to volunteering enquiries for our Befriending Service, which enabled us to double the amount of clients we could visit.

Database

We created a database to be able to manage the volunteer recruitment process. This huge project was undertaken by a volunteer who created a bespoke system for us to monitor the impact of volunteers on the charity and record details to improve our service,

As part of our Volunteers' Week activity, we collated quotes from our volunteers about why they volunteer for the charity and shared them through social media.



“I’m developing my skills by learning new things required for the tasks.” **STEVE**

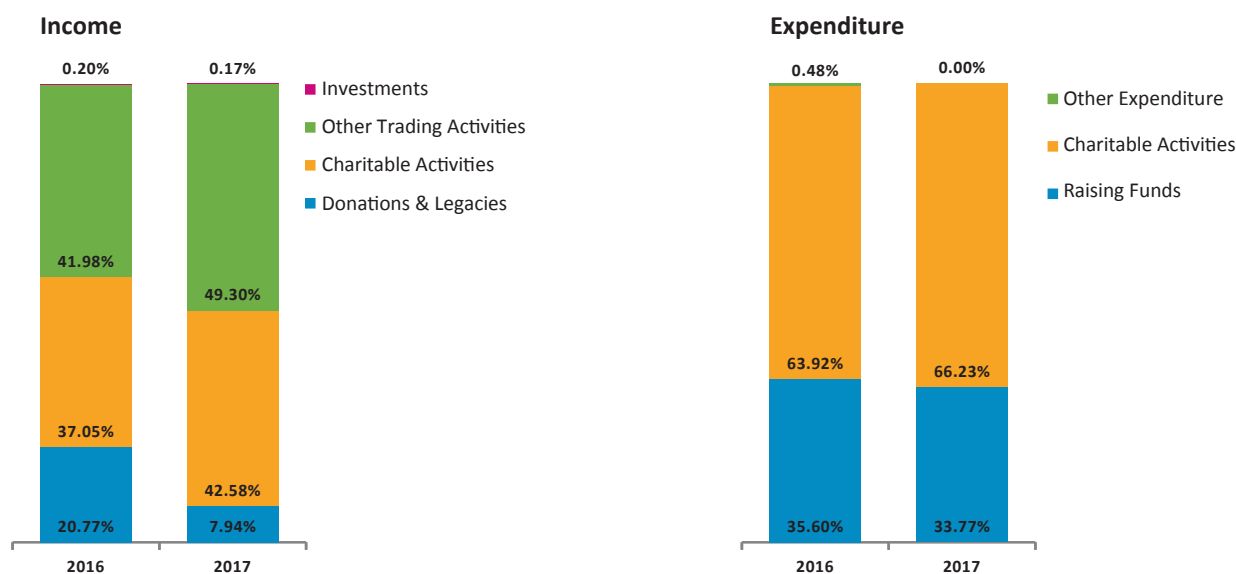
Financial Summary 2016 - 2017

AGE UK LINDSEY
(A Company Limited by Guarantee)

STATEMENT OF FINANCIAL ACTIVITIES INCORPORATING INCOME AND EXPENDITURE ACCOUNT
FOR THE YEAR ENDED 31 MARCH 2017

	Note	Restricted funds 2017 £	Unrestricted funds 2017 £	Total funds 2017 £	Total funds 2016 £
INCOME FROM:					
Donations and legacies	2	42,451	48,094	90,545	248,911
Charitable activities	6	-	485,336	485,336	443,966
Other trading activities	3,4	-	561,962	561,962	503,016
Investments	5	137	1,797	1,934	2,414
TOTAL INCOME		42,588	1,097,189	1,139,777	1,198,307
EXPENDITURE ON:					
Raising funds	4	-	399,849	399,849	368,500
Charitable activities		42,709	741,484	784,193	661,551
Other expenditure		-	-	-	4,962
TOTAL EXPENDITURE	7	42,709	1,141,333	1,184,042	1,035,013
NET INCOME / (EXPENDITURE) BEFORE OTHER RECOGNISED GAINS AND LOSSES					
		(121)	(44,144)	(44,265)	163,294
NET MOVEMENT IN FUNDS		(121)	(44,144)	(44,265)	163,294
RECONCILIATION OF FUNDS:					
Total funds brought forward		31,360	648,025	679,385	516,091
TOTAL FUNDS CARRIED FORWARD		31,239	603,881	635,120	679,385

All activities relate to continuing operations.

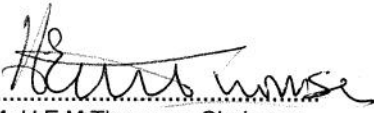


Financial Summary 2016 - 2017

AGE UK LINDSEY
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REGISTERED NUMBER: 03917990

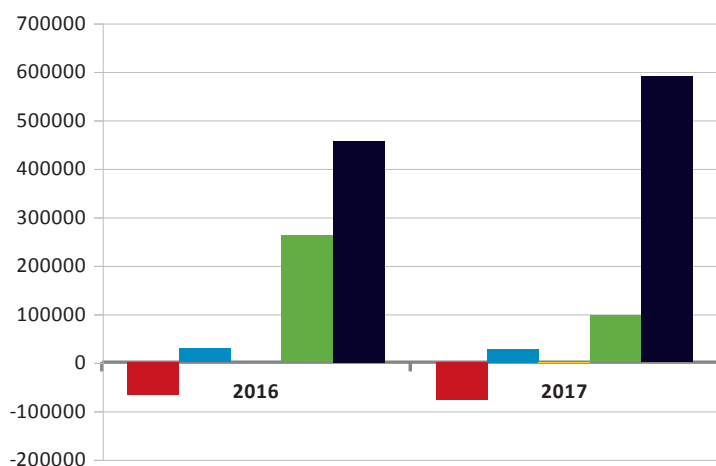
BALANCE SHEET AS AT 31 MARCH 2017

	Note	£	2017 £	£	2016 £
FIXED ASSETS					
Tangible assets	13		27,045		28,658
CURRENT ASSETS					
Stocks	14	71		-	
Debtors	15	95,420		261,099	
Cash at bank and in hand		589,404		456,071	
		<u>684,895</u>		<u>717,170</u>	
CREDITORS: amounts falling due within one year	16	<u>(76,820)</u>		<u>(66,443)</u>	
NET CURRENT ASSETS			<u>608,075</u>		<u>650,727</u>
NET ASSETS			<u>635,120</u>		<u>679,385</u>
CHARITY FUNDS					
Restricted funds	17		31,239		31,360
Unrestricted funds	17		603,881		648,025
TOTAL FUNDS			<u>635,120</u>		<u>679,385</u>

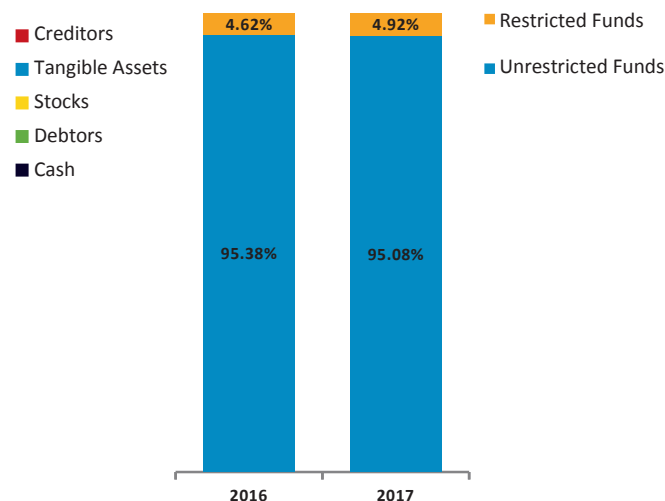

Mr H E M Thomson, Chairman



Cllr O. Bierley, Treasurer

Assets



Charity Funds





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