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T 01443 776154
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LEGAL AND ADMINISTRATION INFORMATION

Trustees

Jean Yerbury
Tony Hutchings
Enid Williams
Meinir Evans
Mary Winter
Mair Evans

Director

Rachel Rowlands

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Pontypridd CF37 2BP

Auditors

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Newport NP20 4PG

Bankers

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Cardiff CF10 2XU

Solicitors

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30 Years of Dedication



AGE
Concern

www.acmorgannwg.org.uk

AGE
Concern

Working for older people,
with older people

Age Concern Morgannwg acknowledges the support of our Stakeholder Partners and looks forward to working with them in the future.

We would also like to acknowledge all donors who support the charity through 'In Memorial' and various fund raising events. Your continued support is appreciated.



Annual Report 2007

www.acmorgannwg.org.uk

Registered Charity No. 507495

COMIC
RELIEF





Message from the Chair

It is with great pleasure that I greet you once again through the Annual Report, in this, the 30th Year of Age Concern Morgannwg.

Once again, the staff and volunteers involved of the organisation have excelled in their commitment to delivering the highest quality services, information, advice and support to the older people living in the areas of Rhondda Cynon Taff, Bridgend and Merthyr Tydfil.

In my Chairperson's address last year, I spoke of the many pressures that accompany regulation of our services as a registered Domiciliary Care Agency and by our involvement in Trading Age Concern Enterprises Products and Services. It is encouraging for stakeholders to see ongoing improvements to all services as a result of motivated staff who are willing and keen to learn new skills that will improve their performance and promote job satisfaction. Just over half of the workforce have now completed formal vocational qualifications in addition to other forms of training and self development. It is my firm belief that Age Concern Morgannwg now offers real career prospects to those wishing to work with and for older people, across a range of services and programmes.

The Charity finalised its three year Strategic Business Plan (2007-2010) following extensive consultation with staff and partner stakeholders during the course of the year. The plan, which took effect from 1 April 2007, sets out ambitious yet realistic aims and objectives for service development and new business initiatives that will create a more sustainable future for the Charity to continue working for and with older people.

Once again, I am delighted to report an increase in the Charity's income this year and in particular, that our Trading operation has returned a profit to support our charitable activities.

In closing, I would like to thank my fellow Trustees for their commitment and determination to the challenges we have met and overcome during the year. As always, we are indebted to the staff and volunteers for their loyalty and for going the extra mile to ensure Age Concern Morgannwg remains the charity of choice in developing, delivering and shaping services for older people.

Jean Yerbury
Chairperson

Directory of Services

The following Directory provides a brief overview of the teams and services within the organisation and the areas in which those services are available.

Directorate and Corporate Services Team

For all enquiries relating to Human Resources, health and safety, procurement, publicity, Media and general information about the Charity.

Community Outreach Services:

- *Hospital Discharge Service (RCT, Bridgend and Merthyr Tydfil)*
- *Primary Care and Dementia Outreach Service (R.C.T and Merthyr Tydfil)*
- *Residential Activities Project (RAP) (RCT)*
- *Joint working in Teams (RCT)*
- *Cwmni Dda Day Unit (RCT)*
- *Ysbyty George Thomas Day Unit (R.C.T)*
- *Keeping in Touch Project (R.C.T)*
- *Minerva Street Day Unit (Bridgend)*
- *William Stephen Jones Evening Club (RCT)*
- *Supporting People Service (RCT and Merthyr)*
- *Independent Advocacy Service (RCT and Bridgend)*
- *Bryn Ivor Extra Care Project (RCT)*
- *Information and Advice Casework (RCT)*
- *Information Officer (Merthyr Tydfil)*
- *Customer Services Team*
- *Volunteer Services (R.C.T and Bridgend)*
- *Intergenerational Work (R.C.T)*

Specialist Homecare Service

The Charity is registered with the Care and Social Services Inspectorate for Wales to provide Domiciliary Care Services to older people with a diagnosis of dementia or functional mental illness. The service is currently only available in the Cynon Valley area of RCT.

Engagement and Participation

- *Communities First Older People's Participation Team (RCT)*
- *50+ Forums Development Officer (RCT)*
- *SHOUT Forums Development Officer (Bridgend)*

Age Concern Morgannwg Trading Ltd

Our Trading subsidiary supports the charity by selling Insurance and other non-regulated products. Age Concern Morgannwg is regulated by the Financial Services Authority via Age Concern Enterprises Ltd.

For more information on any of the services listed above, please contact us on (01443) 485505

**Choose Option 1 for Insurance Products or Services
Option 2 for Information and Advice
Option 3 for Directorate and Corporate Services
Option 4 for all other enquiries**

Age is an issue of mind
over matter. If you don't
mind, it doesn't matter.

Mark Twain



AGE CONCERN MORGANNWG
(Registered Charity number 507495)
ABBREVIATED GROUP ACCOUNTS
For the year ended 31st March 2007

The following figures are taken from the full audited Group Financial Statements of Age Concern Morgannwg for the year ended 31st March 2007, approved by the Trustees on 21st June 2007 and submitted to the Charity Commission. The auditors, HWCA Limited, whose opinion contained an explanatory statement regarding the opening balances for the current year and the comparative figures, have confirmed that this summary is consistent with the full report. These summarised accounts may not contain sufficient information to allow for a full understanding of the financial affairs of the Charity. For further information the full accounts, auditor's report on those financial statements and the Trustees' annual report should be consulted; copies of these can be obtained from Age Concern Morgannwg, 16 Gelliwastad Road, Pontypridd, CF37 2BW

	2007	2006		
Fixed Assets comprising, Computers & Equipment, Fixtures and fittings	15,708	25,755		
Debtors, being what the charity is owed from:				
Local authorities, Homecare Service Users and prepaid expenditure	96,275	93,761		
Cash, being monies held at the bank and in hand	254,890	220,827		
	366,873	340,343		
Less: What the charity owes to:				
Service suppliers & other creditors	(116,570)	(229,010)		
Long Term Loans	(10,500)	(14,588)		
Provision for liabilities and charges	(45,000)	(32,400)		
	(172,070)	(275,998)		
Leaving what the Charity owns	£194,803	£64,345		
How this was created:				
By Restricted funds	17,428	29,941		
By unrestricted funds	177,375	34,404		
	£194,803	£64,345		
Annual Operations:				
	Unrestricted Funds	Restricted Funds	2007 Total	2006 Total (restated)
Incoming resources from Charitable Activities:				
Revenue grants and other income	389,306	619,855	1,009,161	843,323
Domiciliary services	330,514	-	330,514	299,949
Insurance commission	69,109	-	69,109	82,905
Interest received and other generated income	20,884	1,851	22,735	28,194
	809,813	621,706	1,431,519	1,254,371
Outgoing resources:				
Less: Expenditure relating to the provision of charitable activities, Governance costs etc	675,454	615,607	1,301,061	1,209,342
Net (Outgoing)/Incoming Resources	134,359	(3,901)	130,458	45,029
Transfers between funds	3,772	(3,772)	-	-
Total funds brought forward	71,644	25,101	96,745	36,866
Prior year adjustment	(32,400)	-	(32,400)	(17,550)
Total funds carried forward	177,375	17,428	194,803	£64,345

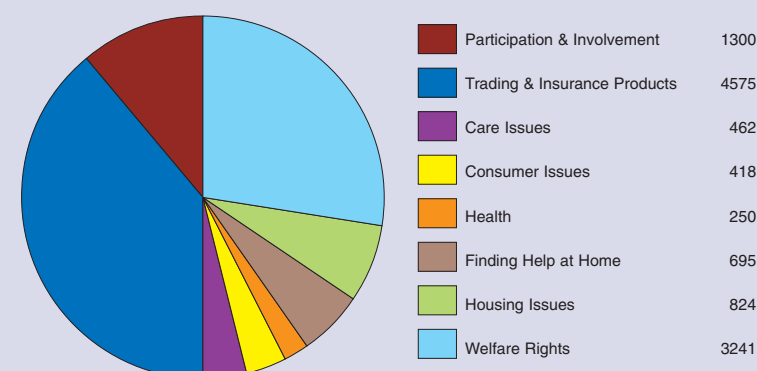
The financial statements were approved by the Trustees and signed on its behalf by Jean Yerbury (Chair) and Enid Williams

The Charity now employs just over **92 paid members of staff** and **40 volunteers** across **Rhondda Cynon Taf, Merthyr Tydfil and Bridgend**. The success of the charity is attributed to the dedication and loyalty of our workforce.

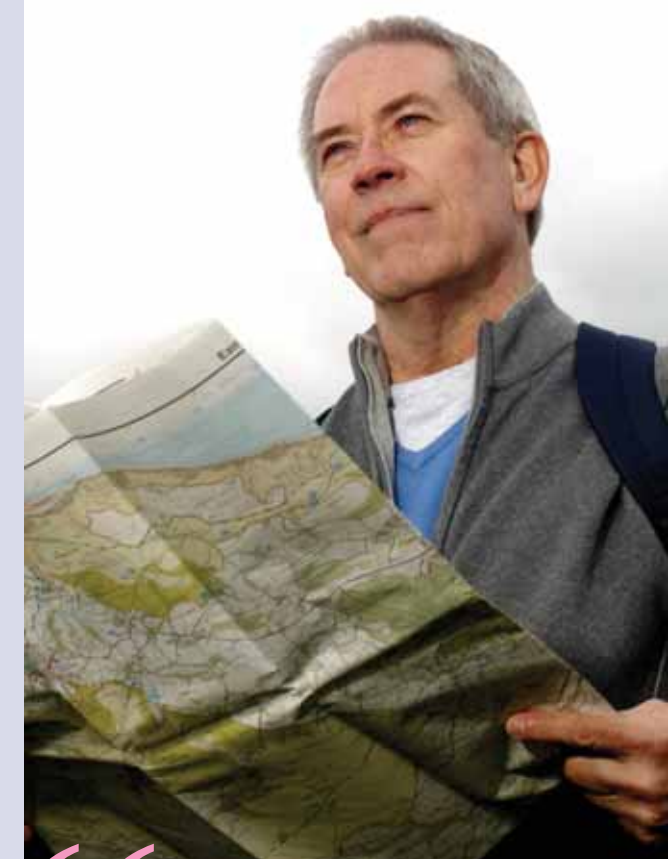
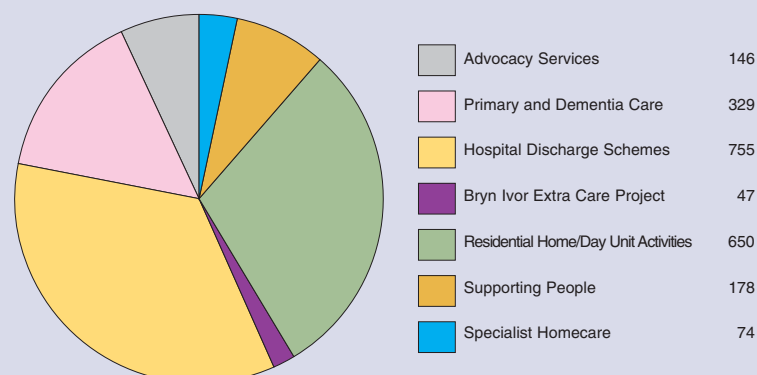
Pointing you in the right direction
...and coming along for the ride!

Age Concern Morgannwg's mission is to improve the quality of life for older people. Through appropriate and timely information and advice, older people are enabled to find solutions to problems and improve their own quality of life. An essential ingredient to the quality of anybody's life is income, and for older people this is of great concern. Income comes into all aspects of life – an enquiry about how to find a cleaner may lead to a claim for a disability benefit, resulting in additional income not just to pay for the cleaner, but for other things as well. Our recent 'outcomes' survey found that most people spend much of their additional income on food, extra heating, transport, clothing, household equipment or furniture, and practical help at home, with only **4%** spending it on treats or luxuries. After receiving extra benefits one of our clients summed things up with *"life is just easier"*.

GENERAL ENQUIRIES



OUTREACH SERVICES



“Every year Age Concern helps 1000s of older people find the help and advice they need.”





“It’s important we reach as wide an audience as possible with information on the services and support available to older people”



• **Statistics**

During 2006-07 ACM received **5619** enquiries of which:

- **48%** for welfare benefits
- **10%** about finding help at home
- **12%** about housing issues
- **7%** about care issues
- **6%** about consumer issues, many of these about increases in fuel prices

ACM staff completed **1081** benefit claim forms, raising an estimated income **£2,232,000** for our clients in benefit payments. An additional **274** requests for form-filling were referred to the CwmNi/Age Concern ‘Bolder Project’ and to the RCT Older People’s Welfare Rights Project. The Bolder Project brought in approximately **£400,000** in benefit payments for their clients.

• **Keeping you informed**

It’s important that we reach as many people as possible with information on the services and support available to older people. Our leaflet stands provided information to hundreds of people passing through the Royal Glamorgan Outpatients Department and RCT day centres. We took information stalls to **11** community events, including the Keep Well This Winter (KWTW) Information Market in Pontypridd, and gave talks to a number of older people’s groups.

We reprinted **8000** RCT Keep Well this Winter leaflets and distributed these via the **66** pharmacies in the borough and local partners. We produced **3000** KWTW leaflets for Bridgend, which were distributed via Age Concern Bridgend, the forums, the Local Health Board and others.

• **New developments**

A joint project with the Merthyr Tydfil Older People’s Steering Group resulted in the appointment of an Information and Advice Officer for Merthyr, based at Trelewis Community Centre. **67** enquiries were received for the period December 06 to March 07, plus stalls at Prince Charles Hospital, the open-air market in Merthyr Tydfil, ‘**50+** and all to play for’ events, KWTW events and talks to groups throughout the borough.

Mrs Thomas*

Mrs Thomas telephoned Age Concern Morgannwg shortly after the death of her husband. Her husband had previously been claiming Pension Credit for them as a couple, so the Pension Service told her she had to make a new claim in her name only. Mrs Thomas was confused and worried by all the forms she had to fill in so she contacted Age Concern Morgannwg to ask for help.

Our Information Caseworker visited Mrs Thomas and arranged for interim payments of Pension Credit to be made as Mrs Thomas was only receiving her state pension of £46 per week. The Caseworker discovered, after checking Mrs Thomas’s benefits, that although Mr Thomas had been receiving Attendance Allowance, they had not taken advantage of the extra Pension Credit they could receive by claiming to be his carer. Although Mr Thomas had passed away, the Caseworker completed a Carers’ Allowance form so that Mrs Thomas could claim the underlying entitlement for the previous 3 months and the 8 weeks after his death. The Caseworker also assisted by filling in forms for a new claim for Pension Credit and Council Tax Benefit and applied to the Social Fund for a Funeral Grant. Mrs Thomas received £900 plus the cost of the flowers and death certificates.

This case was not without complication. The Disability and Carers’ Service made an error when processing Mrs Thomas’s claim which impacted negatively on her Pension Credit. The Caseworker made several calls to both offices and finally resolved the matter, resulting in Mrs Thomas receiving the arrears owed to her.

**not the client’s real name*



“Nobody likes to think about their funeral but its important to get it sorted. The Funeral Plan products offered by Age Concern are a good way of planning for the future.”





“We can’t thank Age Concern enough for all their help - our lives just seem so much easier now”



David and Julia*

David, 70, was referred by an Occupational Therapist to Age Concern Morgannwg Independent Advocacy Service after he suffered a stroke. He has learning difficulties and was having trouble expressing himself and understanding what was being said by the Hospital Consultant.

On assessment it was discovered that David did not receive any disability benefits, nor did his wife Julia, who also has learning difficulties and is deaf. Because of their low income and their lack of confidence in communicating, they hadn’t been shopping regularly and this was affecting their general health.

Initially, the Advocate accompanied David to hospital appointments to ensure he could express his needs and understand what was going to happen to him.

The Advocate supported both David and Julia to claim disability benefit and accompanied them shopping until they had built their confidence to visit a local store.

David and Julia now have links with Social Services Occupational Therapy, Disability and Reablement Teams. They feel less isolated and more confident to express their needs

**not the clients real name*

Advocacy Services - Age Concern Morgannwg employs three advocates, two based in Rhondda Cynon Taf and one based in Bridgend. Their work plays a huge role in supporting vulnerable older people to uphold their rights, express their views about decisions that affect their lives and maintain their dignity.

Engagement and Participation

Older People’s Forums

We are delighted, once again, to work with Older People’s Forums across RCT and Bridgend. Age Concern Morgannwg hosts two Forum Development Officers (FDOs) in each area on behalf of the respective Local Authorities. With representative Forums established in each county borough, the FDOs work closely with individual groups and County Executive Committees to promote sustainability, develop skills and knowledge and encourage participation in local and national issues.

Communities First

Rhondda Cynon Taf CBC is the only Local Authority in Wales to fund a Communities First Older People’s Participation Team.

Intergenerational work is key to breaking down barriers and challenging stereotypical views about younger and older people. Bringing school children and older people together to share social space and activities has proved a real success.

This year a new intergenerational project was launched in Rhydyfelin in partnership with Cardinal Newman School, older people and the Rhydyfelin Regeneration Partnership. Intergenerational sequence dance lessons were held weekly with many offering their expertise, culminating in an intergenerational tea dance at the school in May. Events of this type help forge good relationships between younger and older people as well as offering exercise and lots of fun! The project is to continue and will build on the good work already undertaken.

The team are assisting Pen y Graig and Williamstown Communities First with a “Living History Project” in which older residents have made memory books and are developing a recipe calendar. The next step will involve them in making digital stories from their memories and photos. The project will be celebrated in an intergenerational cooking event soon.

Capacity Building

Capacity building can help build sustainability and the confidence of older people’s groups. The team are working closely with several groups to build their fundraising, project and committee skills, helping them towards independence.



“Intergenerational work is key to breaking down barriers and challenging stereotypical views about younger and older people”



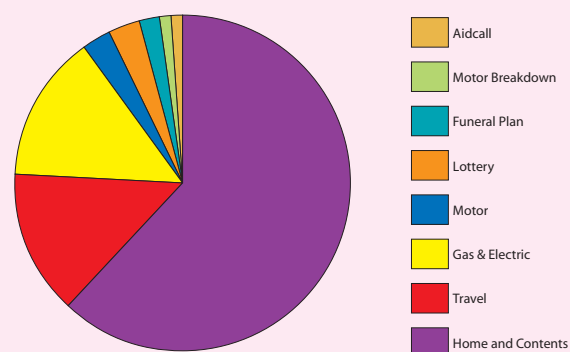


Income from our Insurance Trading is **not restricted** and can be used by the organisation to **support** all its **charitable activities**. We have offices in **Pontypridd, Aberdare** and **Treorchy** where people can buy our products and **talk** to a **member of staff** about any other issues.

It has been a challenging year for Trading as the full impact of the organisational restructure and staff redundancies in the business became apparent. Trading Staff have had intensive training to provide sound product knowledge, the highest level of customer service and to ensure they all meet the requirements of the Training and Competency Scheme. In addition, greater emphasis on cross-selling has made a significant difference to the ratio of products per customer the businesses has written. The business dealt with **4575** transactions (compared to **4432** in the year before, and this generated commission income of **£69,109 (£82,905 – 2005/06)**.

Despite a reduction in staff resources, the business managed to increase sales of **Home and Contents by 22.7%** on the previous year, **from 215 to 264**. However, the increase in activity was offset by a reduction in commission from **15.25%** to **12%** due to the introduction of new product providers (Norwich Union to Fortis). This reduction is reflected in the total commission received. Importantly, the restructuring of the Trading subsidiary and accurate allocation of direct costs has meant that the business is profitable and is making an important and positive contribution to the charity's overheads.

Product	Value of Business	% of Total Commission
Home and Contents	£42,906.37	62%
Travel	£9,910.02	14%
Gas & Electric	£9,145.50	14%
Motor	£2,407.30	3%
Lottery	£1,837.09	3%
Funeral Plan	£1,340.00	2%
Motor Breakdown	£456.57	1%
Aidcall	£470.00	1%
Others	£50.76	0%



Products and Services

- Home Insurance
- Gas and Electricity
- Aid-Call
- Charity Flowers Direct
- Funeral Plan
- Motor Insurance
- Motor Breakdown Services
- Travel Insurance

Outreach Services

¥ A lifeline to independence

Once again, the Community Outreach Service successfully delivered a range of projects and services to improve the lives of older people in Rhondda Cynon Taff, Bridgend and Merthyr Tydfil. By working closely with local stakeholders, opportunities for future growth and the development of new services have been identified and are being pursued into 2007-2008.

Since April 1st 2006 to March 31st 2007, a total of **905** referrals have been made to the Community Outreach Services based at Mountain Ash which cover the areas of RCT and Merthyr Tydfil and a further **278** to services in Bridgend. A total of **7,929** visits have been made to assist older people in their time of need (not including Specialist Homecare Service).

Specialist Homecare Service - Regulated by the Care and Social Services Inspectorate for Wales (CSSIW) as a Domiciliary Care Agency, the Charity provides personal care and emotional support to older people living in their own homes who have a diagnosis of dementia. The service was successfully inspected by CSSIW in 2006 and concluded that an excellent service was being delivered with effective management and performance monitoring systems in place.

- **Improving lives by working together**

Partnership is a concept we take very seriously at Age Concern Morgannwg. Many of the services we offer are the result of a **mutual trust** and respect between ourselves and our strategic partners (the three local authorities and local health boards) across our area of operation. As a result of effective partnership working, we were able to develop new services in Bridgend and Rhondda Cynon Taff.

Community Outreach Services



Minerva Street Day Unit (Bridgend)

This project has allowed us to provide therapeutic activities to older people suffering from dementia. Age Concern Morgannwg staff support the unit **5** days a week providing **2** hour activity sessions. This has assisted in service users maintaining skills and hobbies as well as learning new ones.

Ysbyty George Thomas Day Unit (RCT)

Building on the success of Tegfan Day Unit, this is a new partnership arrangement that involves two Age Concern staff being funded and managed by health professionals working in a multi disciplinary day unit to provide personal care, support and activities to people with dementia.

Bryn Ivor (Extra Care)

Bryn Ivor is a newly refurbished sheltered accommodation with **14** flats for older people. Age Concern Morgannwg, Rhondda Include and Rhondda Housing Association are piloting this project to provide extra care to the tenants of Bryn Ivor and to **26** local people living in the community. The aim is to ensure the service users involved in the scheme receive "extra" care and support **365** days a year.