

# O C A Y

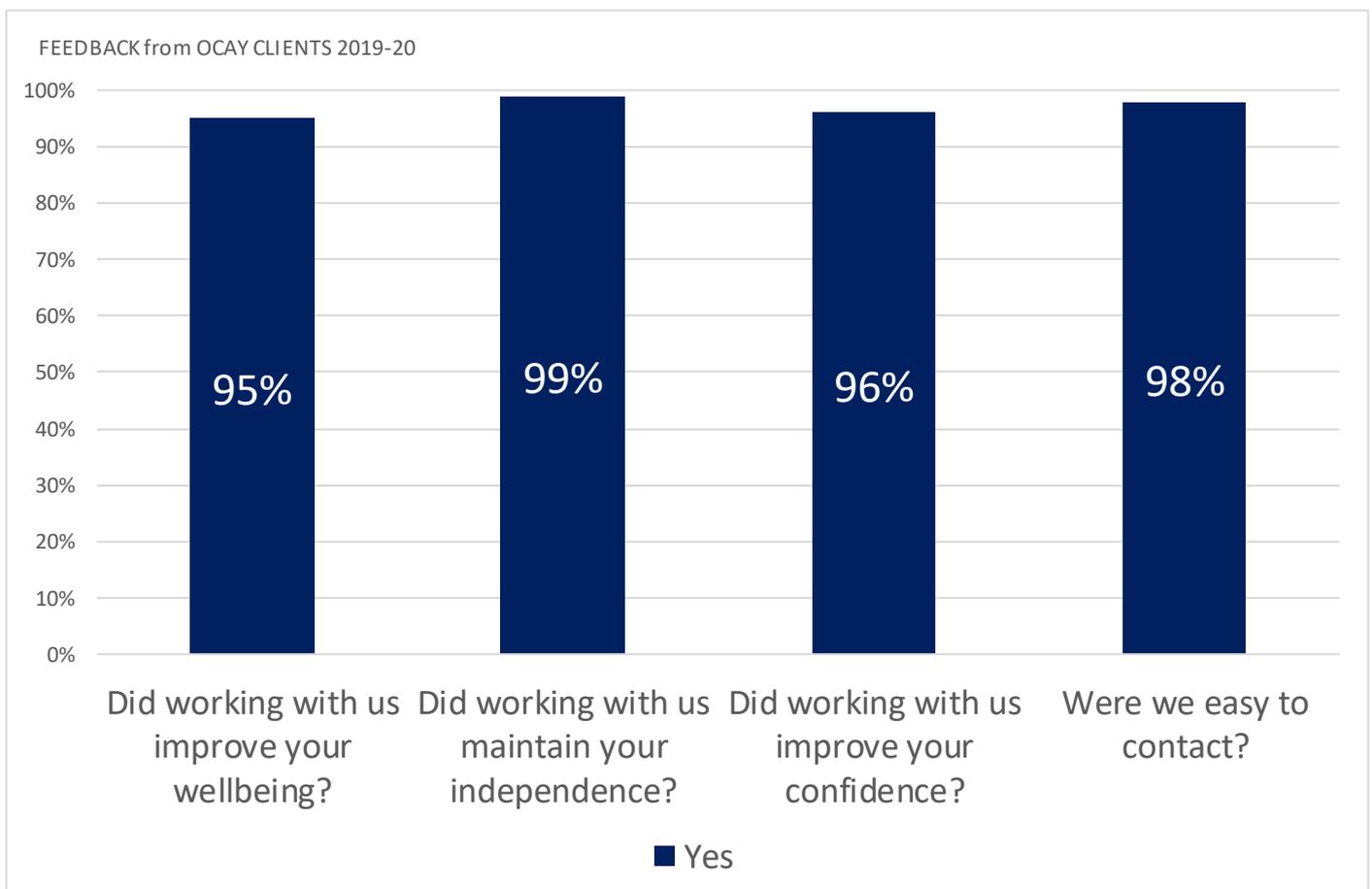
## OLDER CITIZENS ADVOCACY-YORK

### ANNUAL REPORT 2019-2020

Registered Charity No. 1173795

OCA Y was founded in 2001 by a group of older people. They became involved in a pilot run by 'Better Government for Older People', intended to orchestrate better services and communities that worked for older people. We emerged to meet these needs, ensure inclusion, and get older people's voices heard. We have continued to evolve over the years, with funding from the National Lottery Community Fund supported by smaller grants from City of York Council wards and grant-making organisations alongside our own fundraising.

We have offered an independent, free and confidential advocacy service to those over the age of fifty in the City of York area for 18 years and continue to successfully advocate for those in need.

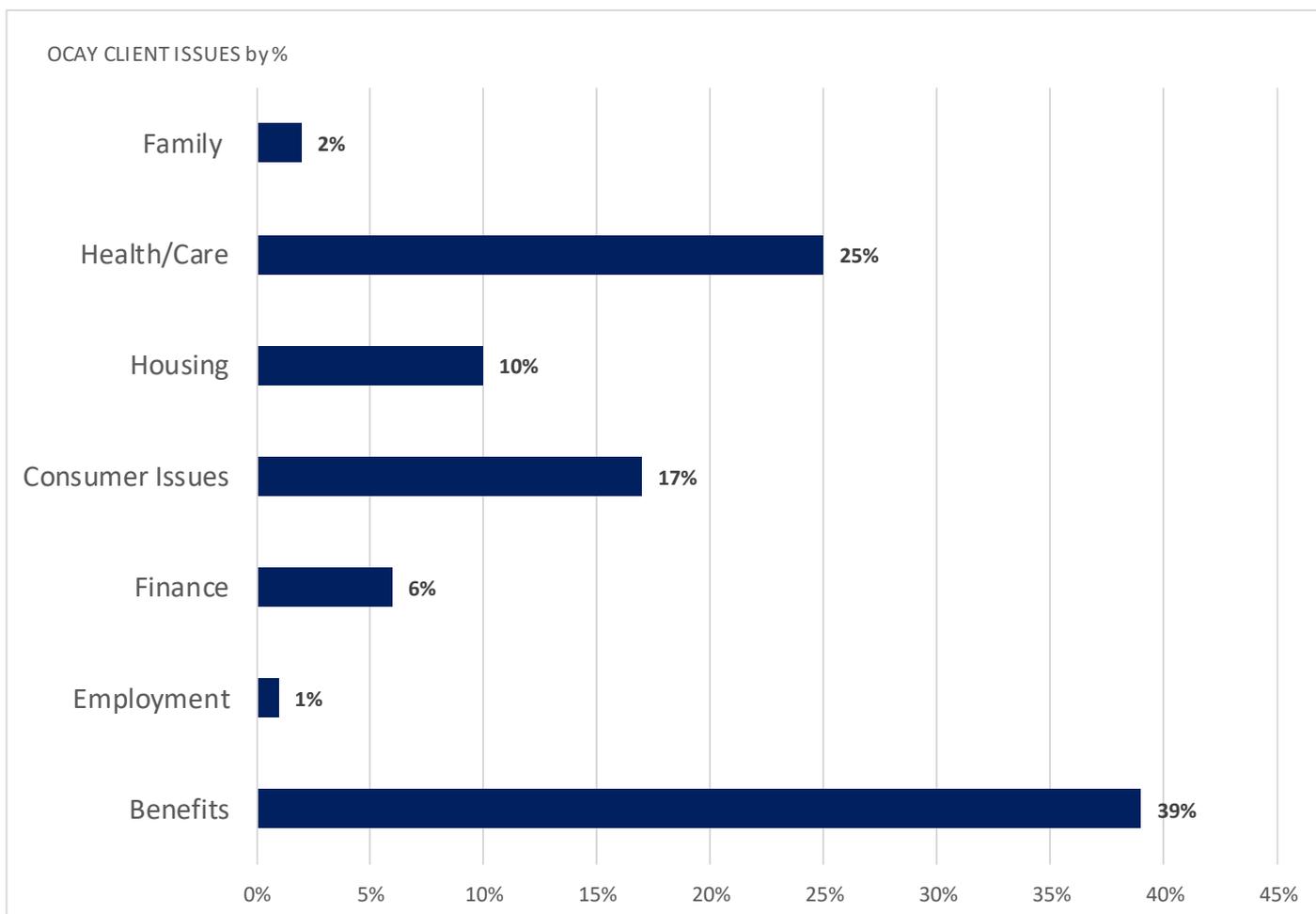


# OCA<sup>Y</sup> supported 328 older people in York in 2019/20

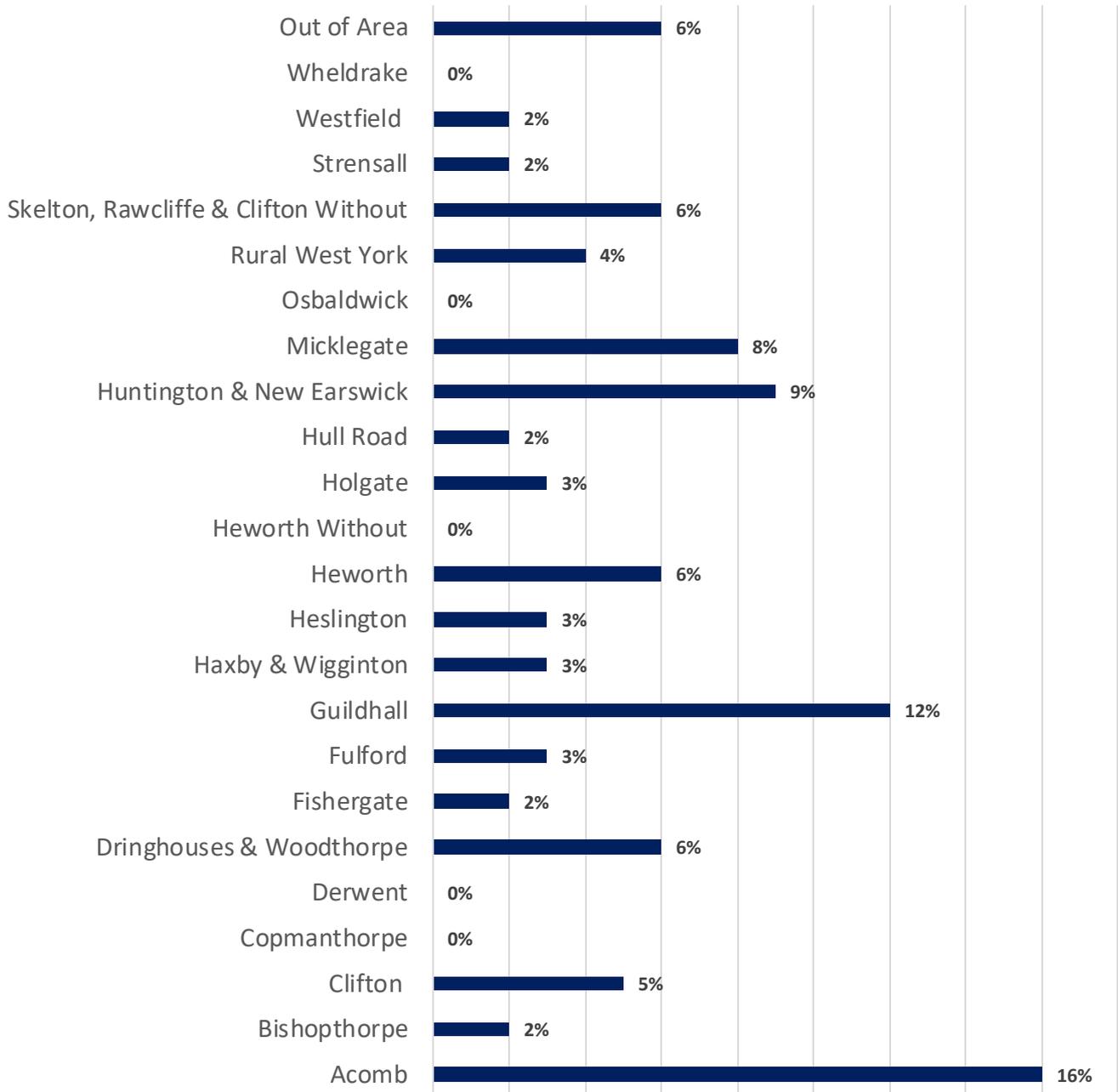
OCA<sup>Y</sup> supports clients with a really diverse range of issues. We've helped people with benefits, including information and form-filling and attending assessments and tribunals. We've also helped with consumer complaints, family, housing and employment issues and we have helped people find out what is going on in their communities. We've seen an increase of people looking for support around health and care in the past year, from filling in power of attorney and blue badge forms, to attending medical appointments with clients and helping them to make complaints about care they received. We've spent 1113 hours directly advocating for clients this past 12 months. That's an average of 6 hours of support for each client!

Clients come to OCA<sup>Y</sup> in a variety of ways - some are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us. We run a door-knocking project to ensure that everybody is aware of our service and know they can contact us, whatever the issue. We currently go to 7 different community groups, libraries and cafes across York where people can stop by to find out what we do, receive information or arrange to meet an advocate.

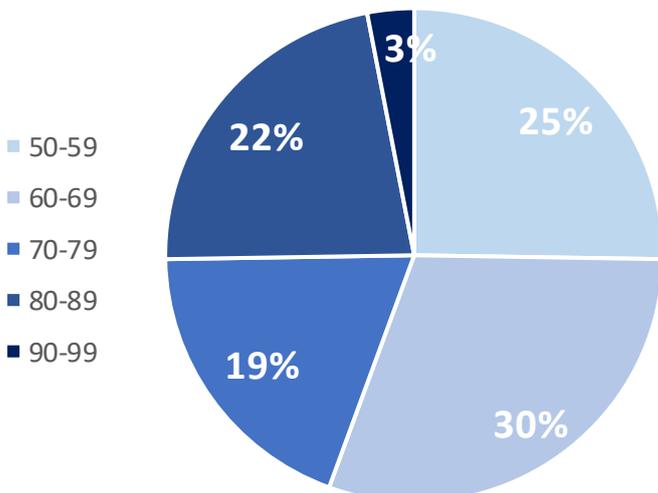
We mostly see clients at our offices in Priory Street, or if this is difficult then we will see them at their own home. We do everything possible to make sure our service is accessible, and known, by anyone who may need it.



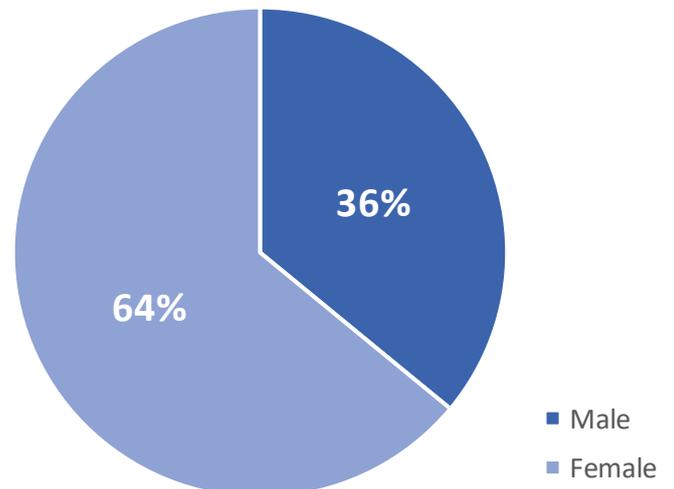
% of OCAY CLIENTS by WARD



CLIENT AGE



CLIENT GENDER



Our service could not operate without our volunteers. We are very proud of the work that they do. They help a wide range of older people, supporting them with many different issues such as...

We were approached by an 89 year old lady. She had been referred by Age UK. The lead advocate visited her at her home for an initial assessment. She felt that her council tax rates were very high, particularly in comparison to her neighbours. The client was isolated and did not have family in the local area.

One of our volunteer advocates visited the client on two occasions and also spoke to her on the phone. The client said that about 10 years ago she had appealed about her council tax rates but had been turned down. The volunteer advocate agreed to support the client to make another appeal.

The advocate gathered evidence, both by visiting local streets and using relevant websites on the internet. She discovered that there were 5 local properties similar to the client's home, which paid a lower council tax rate than her and she informed the client about this.

The advocate agreed with the client to phone the local Valuation Office Agency and ask them to review her current council tax rates. The client answered questions from the adviser at the Valuation Office Agency, with support from the advocate and the adviser agreed to launch a review.

After a couple of months, we heard from the Council that the review had been successful and the client's council tax rates had been reduced. The client is eligible for a significant amount of back pay. The client was delighted with the outcome – a 'very satisfactory outcome' - and very pleased with the support from the advocate. The client said the advocate 'helped me a lot'.

Client contacted our service. He was a gentleman with complex mental and physical health issues. He was in receipt of benefits and on a low income. He was housebound a lot of the time due to poor mobility. He had used our service before and found it extremely useful. He wanted help with his Will and support with transport. He needed extra support as he could not read and write.

The volunteer advocate visited the client at home. The client wanted the volunteer to find out who could look after and store his Will for him and also, he wanted information about local transport options. The advocate did research on the phone, on the internet and by visiting organisations. She phoned a bank and followed this up with a visit. She then phoned a number of solicitors. These organisations were not able to store his Will at a low cost.

Eventually the volunteer supported the client to come to a decision to store his Will in the general office of the housing association, where he lived. She made an extra copy of the Will for him. The client was happy with the solution and there was no cost. During this whole process the advocate gave the client emotional support.

The advocate also did research for the client about potential local transport options for him. She found a couple of local services accessible to him and the client said this 'will be a life changer'.

The client gave very positive feedback about our service. He said we 'really helped me a lot'. He said we did a 'fantastic job' and about our service he said, 'I don't think anything needs improving.' As a result of our support he felt he was 'starting to pick myself up, feeling a lot better'.

**Facts.... 75% of our volunteers are women. Our volunteers range between the ages of 20 and 84.**

# OCA<sup>Y</sup>

currently has three staff members, and nine trustees

**Ruth Potter, fundraising Charity Manager:** Ruth manages the work of OCA<sup>Y</sup> overall and monitors and develops the effectiveness of the service on an ongoing basis. She is responsible for applying for grants, and leading organisational development.

**Dan Brittan, Lead Advocate:** Dan manages his own caseload and carries out initial meetings with all clients. He also gives support and supervision to volunteer advocates. He uses his advocacy expertise to support development work.

**Kayleigh Fox, Charity Support Assistant:** Kayleigh is the first line of contact for clients, volunteers and external organisations. She provides the day to day administrative, financial and business support for OCA<sup>Y</sup>. She also undertakes outreach work in the community.

## **Trustees, April 2019 – March 2020:**

Rachel Totton (Chair – Until 11<sup>th</sup> March 2020,  
Vice-Chair From 11<sup>th</sup> March 2020)

Susan Hannon (Vice-Chair – Until 11<sup>th</sup> March  
2020, Chair From 11<sup>th</sup> March 2020)

Sylvia Doughty (Secretary)

James Grainger (Honorary Treasurer - Associate  
Trustee)

Sharon Beattie

Alan Filby

Chelsea Martin

Vicky Walpole (Until 2<sup>nd</sup> March 2020)

Louise Reid (From 11<sup>th</sup> March 2020)

Gillian Caldicott (From 11<sup>th</sup> March 2020)

**Bankers:** HSBC & CAF

**Examiner of Accounts:** Caroline Cook

**Patron:** Professor Dianne Willcocks

**Honorary Vice President:** Douglas M. Craig, OBE

**Address:** The Priory Street Centre, 15 Priory Street,  
York, YO1 6ET

**Telephone:** 01904 676200

**Email:** [info@ocay.org.uk](mailto:info@ocay.org.uk)

[www.oldercitizensadvocacyyork.org.uk](http://www.oldercitizensadvocacyyork.org.uk)



**Chair's Report:** OCAY continues to go from strength to strength, thanks to its extremely able and committed staff and volunteers. We have continued to recruit new trustees where needed, who have brought new experience and skills to the management committee, and also to retain many highly valued and long-serving trustees. We thank Vicky Walpole, who left us this year, for sharing her skills as a trustee with OCAY. We also said good-bye to Jonah Hebron, who moved on to a new role with a national charity and welcomed Kayleigh Fox to our staff team, as our Charity Support Assistant.

Over the last few years, many aspects of the way we work have been overhauled, polished, or tweaked, depending on how much change was needed. In the last year alone, working practices have continued to develop and best practice to be embedded, at a sustainable pace, as described elsewhere in this report. We are grateful to our funders and community partners for supporting us in this process.

All of this work has led, over time, to a more streamlined and effective organisation, as evidenced in the positive client and volunteer feedback we receive. We are very pleased that this progress has been recognised by being shortlisted in the 2020 National Charity Governance Awards in the **Improving Impact** category. The fact that OCAY has become more resilient and robust is demonstrated by our ability to continue providing our service to the older people in our community through the COVID-19 emergency, despite the constraints of social distancing.

After six years in the role of Chair, I took the view that it was time for a fresh injection of energy in the role! I am delighted to pass on the baton (hopefully as seamlessly as possible) to Susan Hannon, who has got off to an excellent start since her election in March 2020. **Rachel Totton**

I am honoured to be taking over as Chair of the Board and want to thank Rachel Totton for her time and commitment to OCAY and her personal support in preparing me to take 'the baton'! We are all very delighted Rachel stays on as Vice Chair. We have an exceptional team of staff, supporters, volunteers and trustees and I am sure that together we will successfully navigate the current Covid-19 crisis and continue to provide much needed support ensuring the older people of York have their voices heard. **Susan Hannon**



Susan Hannon (Vice-Chair Until 11<sup>th</sup> March 2020, Chair From 11<sup>th</sup> March 2020)



Rachel Totton (Chair Until 11<sup>th</sup> March 2020, Vice-Chair From 11<sup>th</sup> March 2020)

## What OCAY did in 2019-20

## Why we did it

### Volunteer Support, Recruitment and Training

Developed our volunteer support:

- Following feedback from volunteers, we developed regular volunteer peer support meetings.
- We also provided information sessions where speakers from organisations such as Welfare Benefits Unit and Yorsight provide information about their services.

Streamlined our volunteers' recruitment and training:

- We hold an 'Interested in Volunteering' session in September and March, followed by our 3 module Induction Training for new volunteers.

Improved our volunteer retention:

We have increased the number of volunteers and our volunteers are staying with us.

### Quality Standards, Monitoring and Evaluation

Demonstrating our impact:

- We supported the Charity Manager to attend the JRF Funder Plus workshops 'Understanding your Impact'.

Introduced pre and post case questionnaire:

- The questions cover feelings of control, being taken seriously, having your voice heard and the impact the advocacy issue is/was having on your well-being.

Base lined diversity monitoring:

- Importantly, we embedded our diversity monitoring and now routinely ask clients for diversity information.

Self-assessment:

- Using AQPM framework, we undertook the self-assessment. We will continue to seek funding to go through the external accreditation process.

Volunteers are able to share their experience of working with different types of cases with each other and have the opportunity for learning and developing their role. The experience and skills of volunteers are valued and continue to develop.

In order to increase volunteers' knowledge of services available to clients.

This makes it easier for potential volunteers to find out about our volunteering roles and ensures that all new volunteers gain the skills and understanding that they need in the role.

As a result, we can support more older people. The feedback from our annual volunteer survey shows that volunteers feel well supported and more confident in their role.

We wanted to increase our knowledge and understanding of the impact of our work on clients, to help us to improve our service delivery.

Undertaking the pre and post case questionnaires, developed last year has enabled us to measure the distance travelled by clients working with us. This also means that our improvement is led by feedback from our clients. We will continue our development work to understand the long term and/or enduring impact of our work with clients, to enable us to continually improve our service.

We want to understand how accessible our service is to people from different diversity strands. By comparing our data with that of the city, we can understand where we need to target our outreach work to ensure accessibility.

We wanted to ensure that we are delivering high quality advocacy services. The QPM process also helped us to review, improve and develop our organisational systems, policies and practices.

The National Charity Governance Awards:  
We entered the awards in the category 'Improving Impact'.

We wanted to demonstrate how we have developed ways of measuring our impact, both so that people using our advocacy service have external reassurance of the quality of the service, and in order to receive external recognition of the work Trustees have undertaken in this area.

## Outreach

Reviewed our outreach strategy:

- We provide drop ins at 7 locations in York and have evaluated the relevance and effectiveness of these.

To continue to reach new clients, especially those who might otherwise find it hard to access the service; to use limited resources as effectively as possible; to provide clients with a variety of places where the service can be accessed nearer to where they live, in partnership with local venues.

Review of website.

We wanted to ensure that our website was up to date and accessible with clear, good quality information so that clients and potential volunteers could access the information they needed.

## Strands for Future Development Progressed

Trustees, volunteers and staff worked together to identify the most appropriate activity strands for OCAY to explore and potentially seek to develop for future work:

- Trustees used a 'Decision Tree' template to assess the business case for the new advocacy strands, agreeing to take forward and broaden our reach to ex-offenders and ex-service personnel.
- Benefits advocacy: Work has commenced.
- Dementia advocacy: Work will commence in Sept 2020.
- Ex-offender's advocacy: Funding is being sought.
- Ex-service personnel advocacy: Funding is being sought.

Our work with existing clients has shown a range of more specialised needs that OCAY's service could be developed to meet. Developing our understanding of these areas of work, by talking to potential service users in prison and in the community, helps us to know the depth of need to enable us to make a case for funding. Work this year has embedded our benefits advocacy project with 39% of our clients needing support with benefits. This process has ensured that development work is in line with OCAY's core mission - 'The objective of Older Citizens Advocacy York (OCAY) is to provide relief to older people in need in the City of York and its surrounding area, by the provision of a general advocacy service.'

## Leadership and Strategy

Recruited new Trustees:

- Following an audit of Trustees' skills, the recruitment was targeted to increase skills around communications, public relations, marketing and fund-raising expertise.

Two new Trustees were recruited this year to broaden the knowledge of the Trustees and bring fresh ideas to the Board.

Agreed new Strategic Plan 2020 -25:

- The Strategic Plan was reviewed and updated, with supporting action plans to form the basis of reporting to trustees at each board meeting.

Strategic Plan - To ensure that all the work undertaken by OCA Y sits within our core mission. Action Plans - so Trustees can be assured that the Charity Manager and the staff team are delivering against the plan. The Plan is also available to funders to give assurance of our organisational focus.

### Partnerships and Networking

Increased our work in partnerships and networks:

- Advice York Partnership.
- CVS Volunteer Forums.
- Ageing Well Partnership Board.
- York Older Peoples Assembly.
- Armed Forces Covenant Steering Group.
- Human Rights Steering Group.

Sharing our thinking and development with partner organisations helps the voluntary sector to be sustainable and gives access to continuing new ideas and learning. The range of information gained from working in partnerships and networks also helps us to support our clients effectively and respond to the issues they have asked for help with.

### Fund Raising Strategy

- The Fund-Raising Strategy was developed by Trustees to try to diversify funding streams.
- Our community fund raising is increasing and a successful sponsorship event was held this year.
- Work has been completed to encourage donations and legacies.
- A subgroup of Trustees are working on a Corporate Fund-Raising Plan.

Fundraising remains a constant and increasingly challenging focus for sustainability, with a need for new and imaginative ideas and to seek to diversify funding streams.

