

# 2023

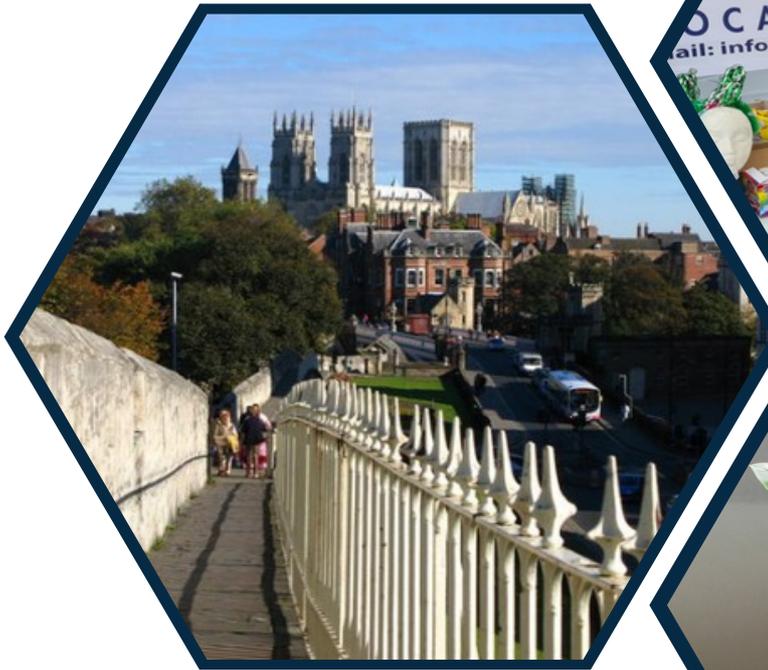
# Annual Report

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# O C A Y

OLDER CITIZENS  
ADVOCACY-YORK

Registered Charity No. 1173795



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## Mission Statement

**OCAY recruits and trains volunteers to act as independent advocates who support all citizens of York aged 50+ to speak up on the issues that affect them, to ensure they are socially included and free from poverty.**



OCAY 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 50 in the City of York area for 22 years and continue to successfully advocate for those in need.

# Meet Our Team



**DAN BRITTAN**  
ADVOCACY MANAGER



**ABI WILLIS**  
OPERATIONS MANAGER



**DANNI GORDON**  
ADMINISTRATION



**MATTHEW KNIGHT**  
CHAIR OF TRUSTEES



**GILLIAN CALDICOTT**  
VICE CHAIR OF TRUSTEES



**LAURA WALKER**  
TREASURER



**SYLVIA DOUGHTY**  
SECRETARY



**TRACEY DENNISON**  
TRUSTEE



**JEAN REED**  
TRUSTEE  
& ADVOCATE

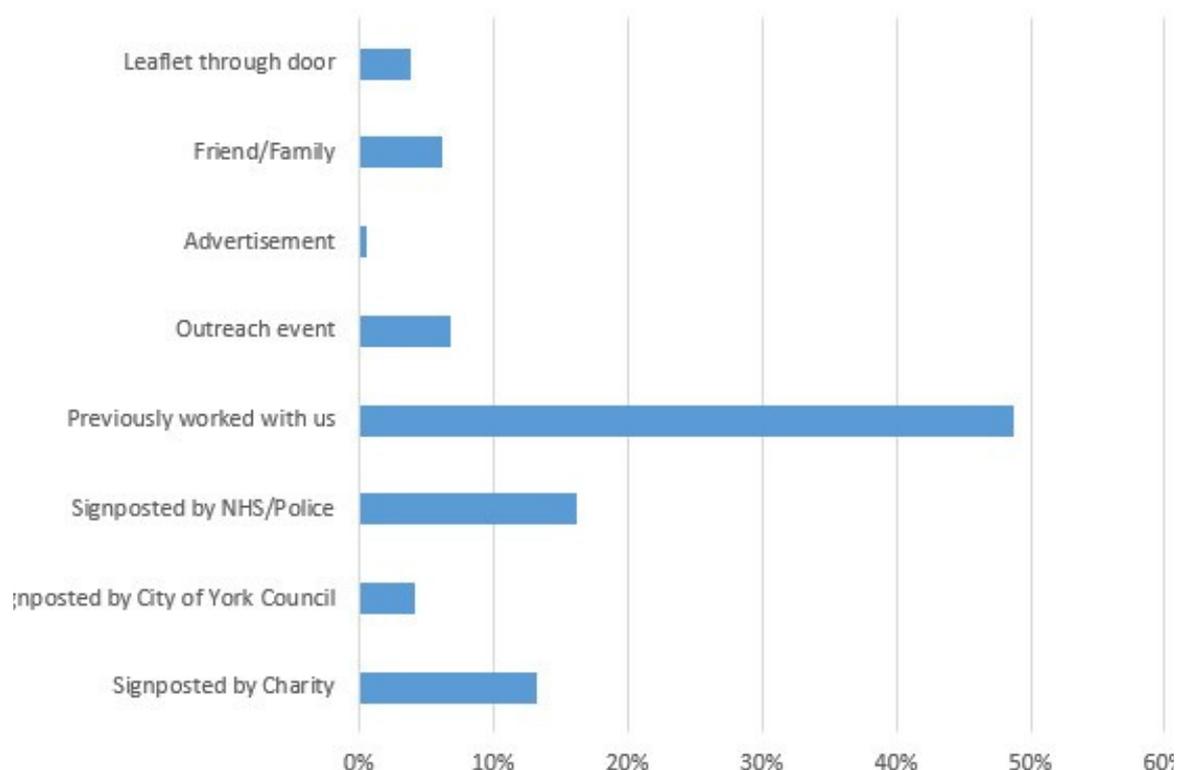
# Vision

**AT OCAY, our vision is to support clients with a diverse range of issues. The current trend is benefits, including information, form-filling and assessments. 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 Blue Badge applications in the past year from 4 in 2020/21 to 65 this year.
- **We've spent 1390 hours directly advocating for clients this past 12 months. That's an average of 4.6 hours of support for each client.**

In 2020/21 we did 290 cases, in 2021/22 we did 463 cases and this year we completed **468** cases so the demand for our service is increasing. Many of our clients have underlying health conditions, mental health issues or are often very frail and elderly. This year **89%** of our clients stated they were disabled (physically, mentally or intellectually), 47% lived alone and 16% cared for someone else.

"How did you hear about OCAY?"



# AGM Minutes 2021/22

No	Agenda Item
	<p><b><u>Present:</u></b> Rt. Honorable Mayor of York David Carr, Lynda Carr, Matthew Knight, Gillian Caldicott, Dan Brittan, Susie Braithwaite, Helen Wright, Pat Hanage, James Cannon, David Harbourne, Fiona McCulloch, George Wood, Richard Sorton, Jenny Nicholson, Jean Reed, Sylvia Doughty, Abi Willis (minutes)</p>
1.	<p><b><u>Apologies:</u></b> Tracey Dennison, Darryl Smalley, Sarah Furness, Elizabeth Stafford, Kathleen O’Kelly, Chris Mead, Rachel Maskell, Matthew Leighton, Liz Wilson, Paul Varney</p>
a.	<p><b><u>Welcome:</u></b></p> <p>Matthew Knight, Chair, [MK] welcomed all to OCAY’s 2022 AGM and thanked the volunteer advocates for lending OCAY their valuable skills. Mk also thanked Dan Brittan and Abi Willis for “holding the fort with a great positive spirit “during the previous 5 weeks and confirmed OCAY will be looking to fill the staffing space in the new year.</p> <p>MK said it was a particular pleasure to welcome the Lord Mayor and Lady Mayoress to the meeting, and he thanked them for their interest in, and support for, OCAY’s work.</p> <p>MK also welcomed the guest speakers: Fiona McCulloch, Chief Executive of Citizens Advice York, Jim Cannon- Chair of the York Older Peoples Assembly (YOPA) and David Harbourne- Chair of the York Centre for Voluntary Service (CVS).</p> <p>“Making Partnership Working Work”, the theme of the AGM - OCAY works in partnership with many organisations in the city and is always keen to explore new joint ways of working to improve the services it provides to support older people.</p>
1b.	<p><b><u>Fiona McCulloch –MK introduced (FMc)</u></b></p> <p>(Due to technology issues, FMc’s Power Point was not used throughout her talk. This has been made available to all following the meeting if requested.)</p> <p>FMc gave a talk surrounding the concern that demand for debt advice has increased substantially and Citizens Advice York encouraging people to write their debt off although this is not always a valid option for all people. She highlighted the concern that the current average disposable income for many people had fallen and had led to an increase in employment issues within the older population group. A particular issue for concern was the slow take-up of the Attendance Allowance benefit and as a group of organizations within York, we should look to helping educate people surrounding this by removing its stigma and helping them to apply.</p> <p><b><u>Jim Cannon – MK introduced (JC)</u></b></p> <p>JC started with a quote: There is more that unites us than divides us”. Partnerships are very important as no one organization can stand alone. JC discussed the issues with the Blue Badge ban in York in conjunction with use of the public bus services within the city. Following the outbreak of covid 19 90% of people in general are back using the bus services, however, only 65% of older people which needs to be addressed to stop older people becoming increasingly isolated which may lead to further issues in mental health and general health. He concluded that the more we can help our clients the better through working in partnership.</p>

# AGM Minutes 2021/22

## David Harbourne – MK Introduced (DH)

DH gave examples from roles he had held in the past to indicate that although it is good to work in partnerships, it is important to understand the limits of the partnership and to know what all parties involved are looking to give to and gain from it. Therefore, it is important to be realistic with expectations and manage the outcomes effectively. It can be an asset bringing in an individual who is not involved in the partnership to monitor and potentially broker the discussions within the partnership and pinpoint opportunities that others may not realise.

MK thanked all the speakers for their varied and thought-provoking discussions. It was agreed that the attendance allowance issue should be publicized widely.

## 2. Minutes of the last AGM (23/09/21) and any matters arising:

Minutes of 2020/21 AGM were approved (Sylvia Doughty proposed, Gillian Caldicott seconded) with no matters arising.

## 3. Receive and adopt the Annual Report for the year ended 30<sup>th</sup> September 2022:

The report was approved (Gillian Caldicott proposed, Pat Hanage seconded) with no matters arising.

## 4. Receive and adopt the Annual Accounts for the year ended 30<sup>th</sup> September 2022:

The report was approved (Sylvia Doughty proposed, Jean Reed seconded) with no matters arising.

MK thanked JG (not present) for all his work on the accounts and the help he has give to DB and AW.

## 5. Re-elections:

Re-elections of GC and SD to trustee positions approved (Jean Reed proposed, Pat Hanage Seconded)

## 6. Any Other Business:

None

## 7. MK thanked all those attending for their support.

Meeting Closed at 2:55pm

# Chairs Report 2023



The last 12 months have seen some significant increases in OCAY's workload, as well as some big changes in our staffing and organisation. We are a developing and ambitious charity - small, but determined to do more to help those older people in the City who need our help.

In the year 2022-23 we dealt with 468 cases - an increase of 50% on pre pandemic levels. Demand shows no signs of decreasing and we have to be constantly on the look out for new ways to make sure we can continue to meet it. We've particularly seen an increase this year in the numbers of benefits related cases coming to us.

It's important to say that we have coped with the additional numbers thanks to the tremendous commitment of both our staff and our volunteer advocates. My particular thanks go to those who have taken on additional cases in recent months and/or have committed to doing so during the winter. And a warm welcome to the new advocates who have joined us during the year. The biggest challenge we face is recruiting new volunteers, to replace those who inevitable leave us from time to time and to enable us to respond to those who need our help. We are always looking for new advocates, so please do point any possible new recruits towards our Advocacy Manager, Dan Brittan.

Our new staffing structure saw Abi Willis appointed as Operations Manager, with Dan as Advocacy Manager. We also welcomed Danni Gordon as our Administrator, and Danni has proved to be an excellent addition to the team. In addition, I'm very pleased that the Trustees have recently agreed to appoint a new and additional part time paid advocate, and that person will support Dan and strengthen the ways we can support our volunteers. We are determined to remain a volunteer led service but we have to balance what our volunteers can do with the right level of staff support and its great we have been able to take this important step.

Abi has had a very successful year in leading our fundraising efforts and its partly because of this that we are confident enough to add to the staffing team. We remain incredibly indebted to Big Lottery for their support, but we know we cannot be complacent. In this context we were particularly grateful to receive important financial support this year from the Aviva Community Fund.

## Chairs Report - 2/2

Abi and Danni have put a lot of effort this year into increasing the quality and quantity of our outreach work as we try to publicise OCAY more effectively and to make sure that those who need us know about us. We have done more organised outreach in the last 12 months than at any other time in OCAY's history.

We lost James Grainger, Chelsea Martin and Sharon Beattie as Trustees during the year and I want to put on record my thanks to all three for the vital parts they have played in guiding OCAY in recent years. They will both be much missed. We were delighted to welcome Laura Walker to the Board to succeed James as our Treasurer. Laura brings a great deal of financial expertise from her work as a senior level finance manager with Asda, as well as experience as a charity Trustee. We also welcomed back Jean Reed to the Board – it's really important we have serving advocates as Trustees and Jean's experience is very helpful to keeping our discussions informed and grounded. I'm very grateful to Gillian Caldicott - OCAY's excellent Vice Chair - and to all our Trustees for their continuing hard work and enthusiasm. We are currently recruiting for new Trustees to strengthen the Board further.

OCAY says farewell this year to one of our most experienced and committed advocates as Sir Alistair Graham steps down. His contribution has been immense (and irreplaceable!) and we are delighted he has agreed to be our guest speaker at this year's AGM, sharing his thoughts and perspectives on OCAY's work and how he evaluates the work that we do.

Finally, I want to acknowledge the excellent support and co-operation we continue to receive from colleague organisations in the City. The York Older Peoples Assembly (YOPA) and Age UK York are particularly important partners, but we operate very positively in collaboration with many other organisations too. My thanks to all our friends and supporters for everything they continue to do to help our work.



**Matthew Knight**

## Older Citizens Advocacy York (OCAY)

### Receipts and Payments Accounts for the year ended 30 September 2023 - Draft & Unapproved

Registered Charity No. 1173795

#### Financial Review

After a very successful year of fundraising, the charity is in a strong financial position, despite cost increases in the year.

The main costs for the charity are the salaries of our key staff members and the cost of our premises. Both costs have increased in the year due to inflationary pressures, but we have worked hard to control other costs and manage our resources carefully.

We continue to be grateful to the National Lottery Community Fund for the provision of our main source of funding. This year was the second of a four year funding cycle and our funding from the National Lottery Community Fund tapers throughout the funding period. To build financial resilience, significant effort has been put into identifying and securing alternative sources of funding. This year we were pleased and grateful to be awarded over £25,000 from the Aviva Community Fund.

Due to the uncertainty in funding beyond 2025 (when the funding from the current National Lottery Community Fund grant ends), we continue to explore further sources of ongoing funding and are holding an increased level of reserves to support our ongoing work. At the end of the year, the charity held £111,000 in reserves.

Trustees continually review forecast sources of funds and the financial outlook of the charity. Due to good financial management, an improving outlook on sources of alternative funding and the level of reserves forecast at year end, the Trustees approved investment into a paid advocate role which was recruited at the end of the financial year. Investment into this role will reduce the level of reserves in 2023.

## Older Citizens Advocacy York (OCA Y)

### Summary of Receipts and Payments for the year ended 30 September 2023

	Notes	Unrestricted funds £	Designated funds £	Restricted funds	1 Oct 2022 to 30 Sept 2023 Total £	1 Apr 2021 to 30 Sept 2022 Total £
<b>Receipts</b>						
Grant funding	2	0	0	92,600	92,600	104,196
Fundraising	3	2,051	0	0	2,051	758
Donations (inc Gift Aid)	4	27,590	0	0	27,590	4,208
Other income					0	46
Bank interest		871	0	0	871	78
<b>Total receipts</b>		<b>30,512</b>	<b>0</b>	<b>92,600</b>	<b>123,112</b>	<b>109,286</b>
<b>Payments</b>						
Staff costs		0	0	69,299	69,299	99,336
Staff training		0	0	70	70	179
Staff recruitment and expenses		0	0	192	192	1,668
Volunteer training		0	0	0	0	850
Investors in Volunteers accreditation					0	2,249
Volunteer expenses		0	0	328	328	354
Property costs		0	0	11,798	11,798	13,071
Telecommunications and IT		0	0	6,649	6,649	9,211
Office supplies		0	0	1,734	1,734	1,992
Insurance		0	0	1,010	1,010	981
Fundraising expenses		102	0	389	491	499
Outreach publicity and events		0	0	284	284	942
General publicity and advertising		0	0	1,028	1,028	1,572
AGM expenses		0	0	222	222	257
Subscriptions		0	0	318	318	42
Bank charges		0	0	61	61	155
<b>Total payments</b>		<b>102</b>	<b>0</b>	<b>93,381</b>	<b>93,483</b>	<b>133,358</b>
<b>Cash funds b/fwd at 1 Oct 2022</b>		<b>46,143</b>	<b>18,000</b>	<b>16,922</b>	<b>81,065</b>	<b>105,137</b>
<b>Net receipts/(payments) in the period</b>		<b>30,410</b>	<b>0</b>	<b>(781)</b>	<b>29,629</b>	<b>(24,072)</b>
<b>Funds transfers</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Cash funds c/fwd at 30 September 2023</b>		<b>76,553</b>	<b>18,000</b>	<b>16,141</b>	<b>110,694</b>	<b>81,065</b>

## Statement of Assets and Liabilities at 30 September 2023

	Total 30 September 2023	Total 30 September 2022
Notes	£	£
<b>Cash funds</b>		
Deposit account	86,645	27,950
Current account	24,010	53,004
Petty cash	38	111
<b>Total cash funds at period end</b>	<b>110,694</b>	<b>81,065</b>
<b>Represented by funds carried forward</b>		
<u>Unrestricted funds:</u>		
General funds	76,553	46,143
Designated funds	5 18,000	18,000
<u>Restricted funds:</u>		
National Lottery Community Fund	12,000	6,940
Financial Inclusion – Benefits programme	0	(261)
Tesco – Bags for Help	(0)	506
Age UK Outreach	0	841
NHS APP	(0)	1,091
Two Ridings Community Foundation – Belfry fund	0	1,645
Common Good Trust	500	738
Aviva – Dementia and Benefits	0	750
The Liz and Terry Bramall Foundation	0	4,672
The Breims Trust CIO	417	0
Persimmon	458	0
Little Wish grant	833	0
CYC Financial Inclusion -2023/24 grant	1,000	0
Asda Grant	932	0
<b>Total funds at period end</b>	<b>110,694</b>	<b>81,065</b>

### Other Monetary Assets

The Charity does not have any other Monetary Assets.

### Investment Assets

The Charity does not have any Investment Assets other than highly liquid cash balances held in deposit accounts.

# **Volunteer Support, Recruitment & Training**

We have recruited 2 volunteers this year so we would like to welcome Roy and Chris to our ranks.

We are in the process of recruiting volunteers with Dan holding a new training session for 5 new recruits this month.

**We have advertised for volunteers on the OCAY website, social media and local community newsletters, such as Local Link and Handy Mag.**

Dan has started a mentoring programme for newer volunteers and has held a new “Coffee & Chat” every other month for our volunteers so they can share ideas and experiences.

**We also held an information session with one of the GP Social Prescribers in York to discuss how they work in relation to OCAY with their cases and referrals.**

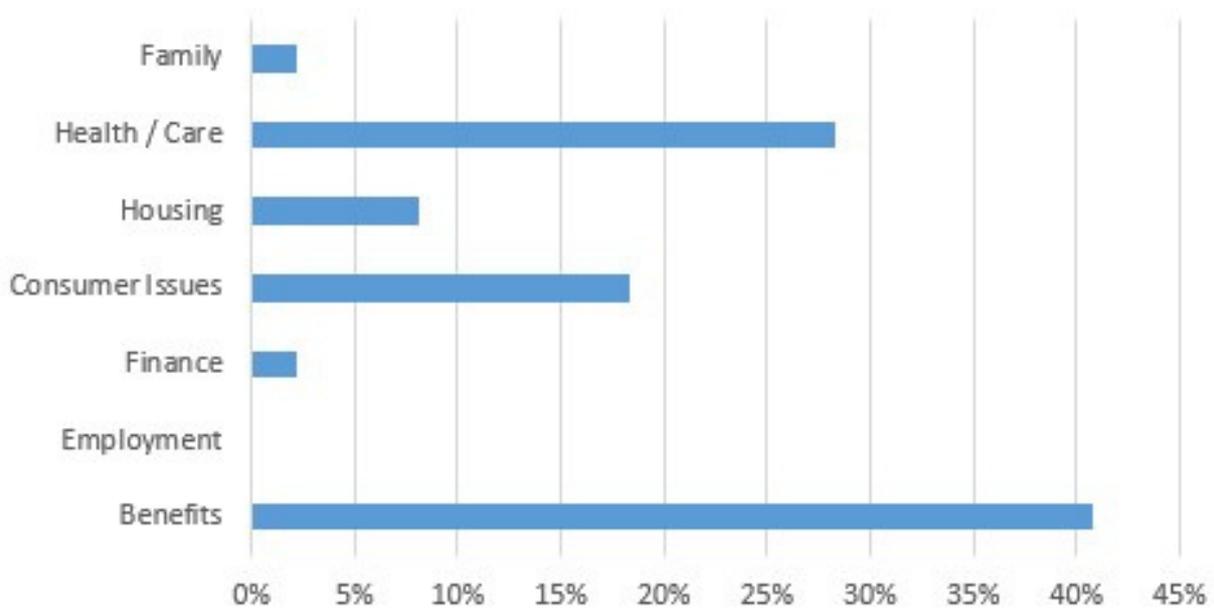
Dan is continuing to make improvements to the Volunteer Training Programme to ensure all new volunteers receive the information and gain the skills that they need in the role. He is also increasing volunteers’ knowledge of services available to clients during the cost of living crisis and beyond. Services and provision of services are ever changing and this being addressed as and when it occurs.

**Dan produces a newsletter every 2 weeks for the volunteers to keep them apprised of what is happening within OCAY as well as important updates of our partner organisations and information changes to subjects such as benefits.**

# Referral Issues

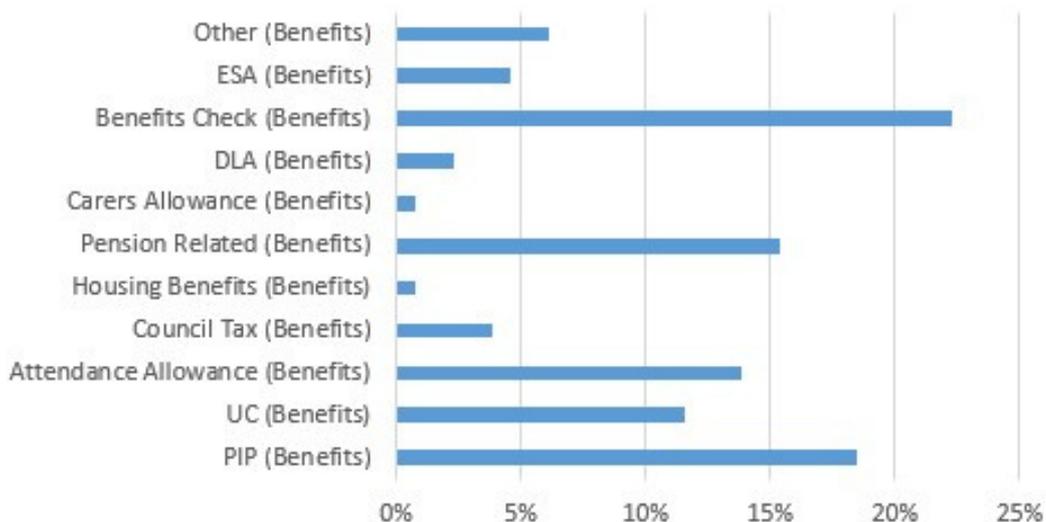
Clients come to OCAAY in a variety of ways - many are referred to us by organisations across the city, some contact us directly by phone or by email, some enquire via our website, others have heard about us through a friend or have previous experience working with us. Following the Coronavirus we are looking to starting to post leaflets through doors again and advertise in local magazines and papers to ensure that everybody is aware of our service and know they can contact us, whatever the issue.

Referral Issues of OCAAY Clients



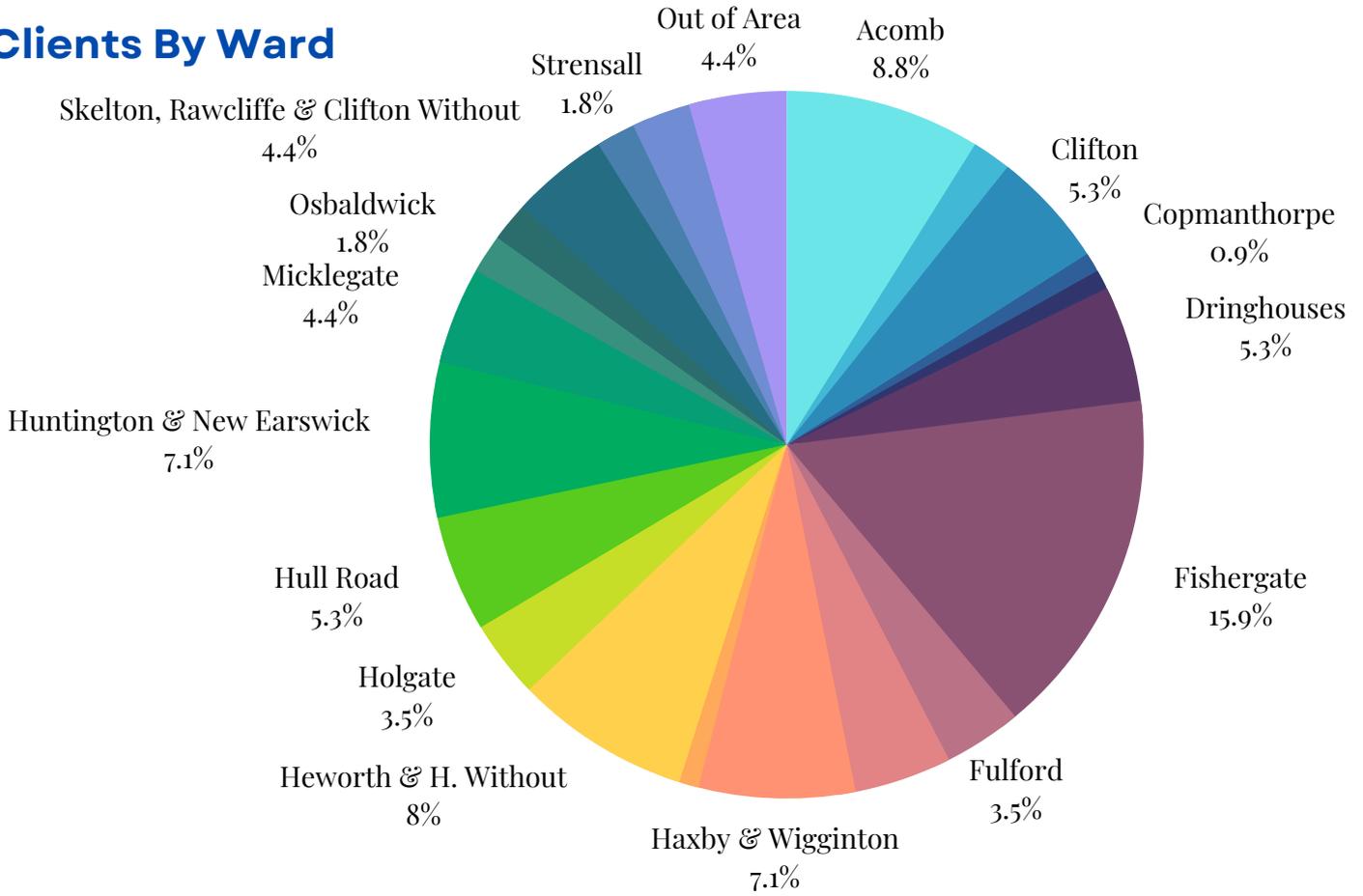
# Breakdown of Benefits Issues

Breakdown of Benefits Issues

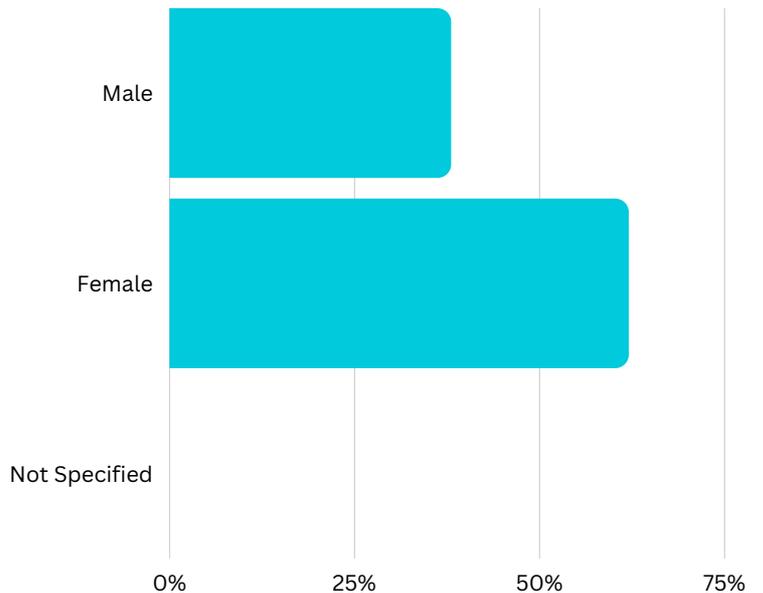
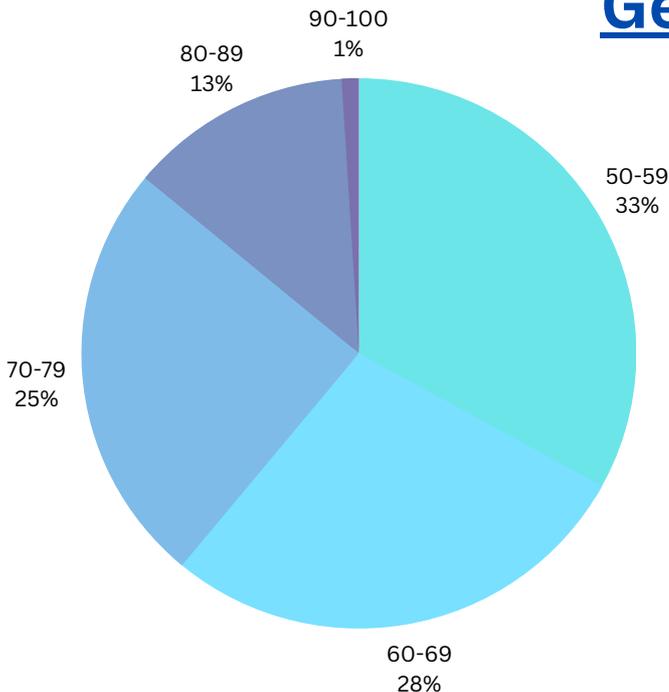


# Where our clients come from

## Clients By Ward



## Client Age & Gender



# Quality Standards, Monitoring & Evaluation

## Demonstrating our impact:

We carried out a longer-term Impact survey in June/July 2023 to understand the long-term impact of working with OCAY.

**We want to increase our knowledge and understanding of the longer-term impact of our work on clients, to help us to improve our service delivery and find out what other factors could be impacting on older people's feelings of wellbeing.**

Embedded 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.

**Undertaking the pre and post case questionnaires, has enabled us to measure the distance travelled by clients working with us and make comparisons year on year. This also means that our improvement is led by feedback from our clients.**

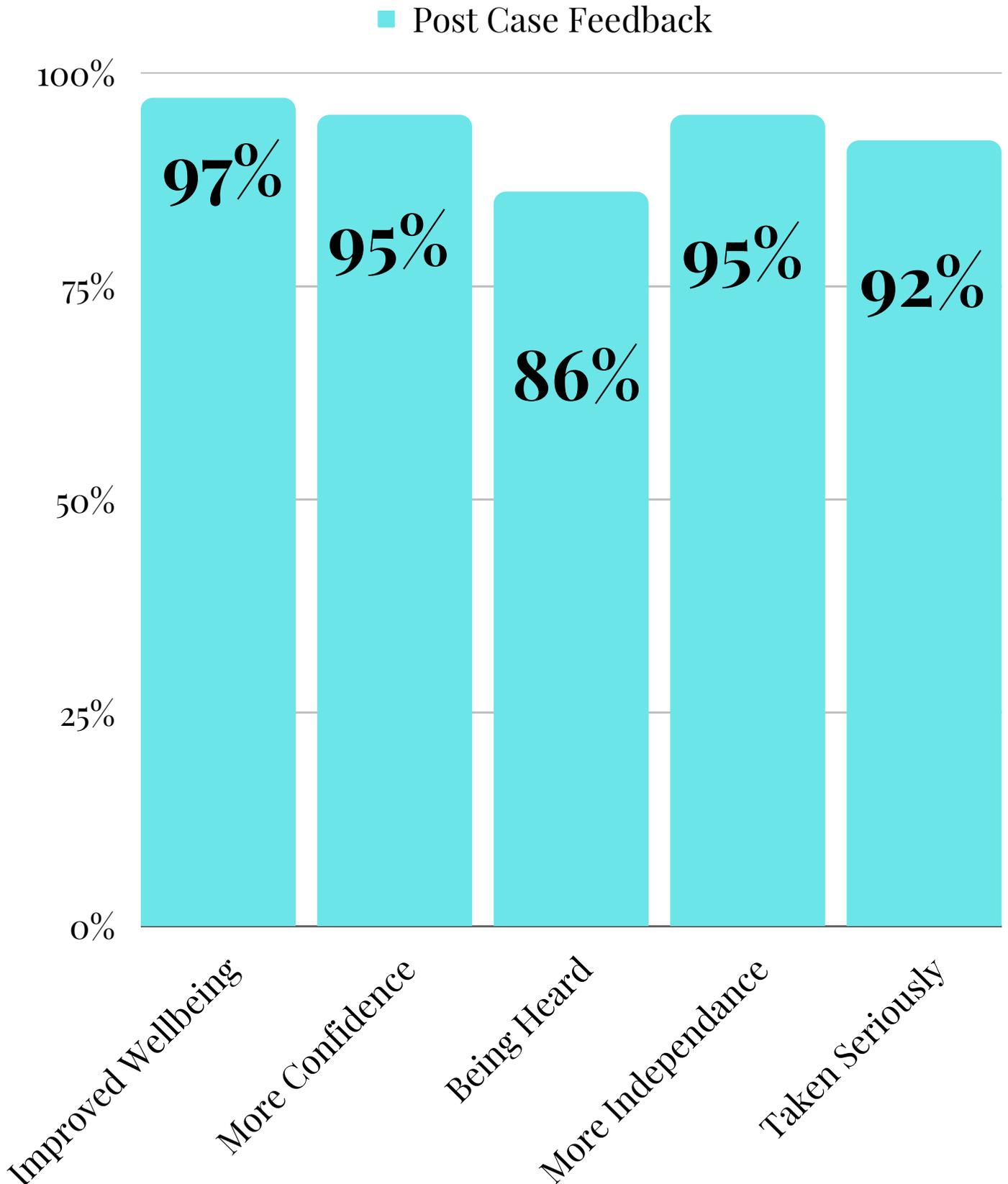
The responses were mainly favourable, participants appreciated the service and were extremely grateful for the support OCAY had provided.

This is demonstrated by **100%** of If you had a problem in the future would you go back to OCAY for help?

**Most people felt that OCAY's support had positively impacted their well-being over the past 6 months. 85% of people gave scores of 8 out of 10 or more.**

# Client Feedback

OCAY has supported 468 cases in 2022/23  
The table below shows the client feedback after  
the case was closed.



# Client Case Studies

## Case Study 1 – Attendance Allowance

Client approached us for help with an Attendance Allowance application. They had applied a few years ago and been turned down but since then their health had deteriorated. They had various medical conditions. An advocate came forward to help with the application. They did research into the application process. The advocate filled in the application under instruction from the client and their son. The application was successful, and they were awarded the higher rate of Attendance Allowance which is £92.40 per week. They were very pleased with the outcome.

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## Case Study 2 – Blue Badge Application

Client wanted help to complete a Blue Badge application. It was a first application. They had severe back pain and had to take medication for this and wanted a Blue Badge so that they could get parking when they visited the local hospital. The advocate spoke to the client on the phone and made an online application on their behalf. The application was successful, and they were awarded a Blue Badge. They were very happy with the service and would use us again and would recommend us to others.



# Client Case Studies

## Case Study 3 - PIP application

Client asked for help with a PIP application. They had applied twice and been rejected on both occasions. The client had physical and mental health issues. Our advocate met the client at the OCAY offices , completed the application under their instruction and sent it in with supporting medical evidence. An assessment was held over the phone with the advocate supporting the client throughout. This was successful. Our client was awarded the enhanced rate of PIP (£71) a week. and received considerable back pay. The client was delighted with the outcome. This benefit will support them to apply for a Blue Badge.

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## Case Study 4 - PIP Appeal

Client asked for help with a Personal Independence Payment (PIP) appeal. They had lost his PIP at a review conducted on the telephone when they had no support and had severe mental health issues. They asked our advocate to write an appeal which was drafted and submitted to the tribunal service. The client was not able to attend the hearing due to health reasons. However, our volunteer advocate was able to represent the client. The appeal was successful, and the client was awarded enhanced daily living PIP - £101.75 per week - and standard rate mobility PIP - £26.90 per week- and was awarded back pay to May 2021.



# OCA Y OUTREACH 2024

We have increased our outreach from 8 locations to 12

## Foxwood Community Centre

Cranfield Place  
(Helen)

Last Friday every month  
12pm - 1:30pm

## Nelli Community Café

Folk Hall  
New Earswick  
(Danni)

4th Wednesday every month  
10am - 11:30am

## The Community Café

St Oswalds Church  
Fulford  
(Dan)

4th Tuesday every other month  
10am - 11:30am

## Red Tower Community Hub

& Foodbank  
Foss Islands  
(Abi)

Third Monday every month  
10:30am - 11:30am

## Clemments Hall

Nunthorpe Road  
(Danni)

Second Wednesday every other  
month  
2pm - 3pm

## St Sampson's Centre

Church Street  
(Dan/OCA Y Volunteer)

Second Wednesday every month  
11am - 1pm



# OCAY Outreach Locations

## Tang Hall Community Centre

Tang Hall Big Local Group  
(Abi)

Third Friday every month for  
"Breakfast"  
9:30am - 10:30am

## York District Hospital

Wigginton Road  
(Abi / Danni)

No set date - depends on free slots  
11am - 2pm

## Food Share Project

### Haxby & Wigginton

Memorial Hall,  
Haxby (Abi)

Second Friday every month  
12pm - 1:30pm

## Huntington Community Centre

Strensall Road  
(Abi)

First Friday every other month  
10am - 11:30am

## Coffee on the Green

Methodist Church Hall,  
Poppleton  
(Danni)

3rd Tuesday every month  
11am - 12:30pm

## New Location in Clifton

Summer/Autumn 2024  
being researched

## New Location in Acomb coming in January 2024

In partnership with

OCAY Volunteer / Age Uk/ York Energy Advice/ 100% Digital York

Second Wednesday every month

10am-11:30am

We are looking to recruit more volunteers to specifically help us grow our outreach project so we can cover more of York in local community centres, foodbanks and warm spaces.



# Partnerships & Networking

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.

## We are currently working with:

·Advice York Partnership

·CVS Volunteer Forums

·Ageing Well Partnership Board

·York Older Peoples Assembly

·Human Rights Steering Group

-Advice York Network

·Outreach partnership with Age UK and York Energy Advice & 100% Digital York

·We are looking to refresh our partnership with The Armed Forces Covenant Steering Group and Ageing Without Children in 2024.

## Fundraising

- The Fund-Raising Strategy to try to diversify funding streams raising opportunities and donations of gifts in kind, such as supermarket token schemes and fixed site collection boxes. We are currently crowdfunding with Aviva Community Fund.
- Corporate Fund-Raising Plan and Corporate Fund-raising packages to be relaunched January 2024.
- Applications made to 31 Trusts and Foundations for funding for 2023/24.
  - Digital Fundraising - A new area for potential development is digital fund raising. Attending webinars and training events to look into this area.

We have increased our presence on social media to include Twitter, Linked In and Facebook. This is especially useful for spreading news about our services, outreach and fundraising events.

We are looking to increase our attendance at local community events and fairs around York. We currently do: West Bank Park and The Fulford Show and the York Older People's Assembly (YOPA) Information Fairs. We are in contact with wards around York to when and where their local events will be taking place in 2024.

# Contact Us



01904 676 200



info@ocay.org.uk



www.oldercitizensadvocacyork.org.uk



www.facebook.com/OCAYork/



twitter.com/OcayYork



www.linkedin.com/OCAY

## Trustees, October 2022– September 2023

Matthew Knight (Chair –from 10th May 2022)

Gillian Caldicott (Vice Chair from 10th May 2022)

Tracey Dennison (Trustee from 10th November 2021)

Sylvia Doughty (Secretary)

Laura Walker (Treasurer)

Jean Reed (Trustee/Volunteer Advocate)

James Grainger (stepped down May 2023)

Chelsea Martin (stepped down Sept 2023)

Sharon Beattie (stepped down Sept 2023)

**Bankers: HSBC & CAF**

**Examiner of Accounts: Caroline Cook**

**Patron: Professor Dianne Willcocks**

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

