



Older People Active Lives

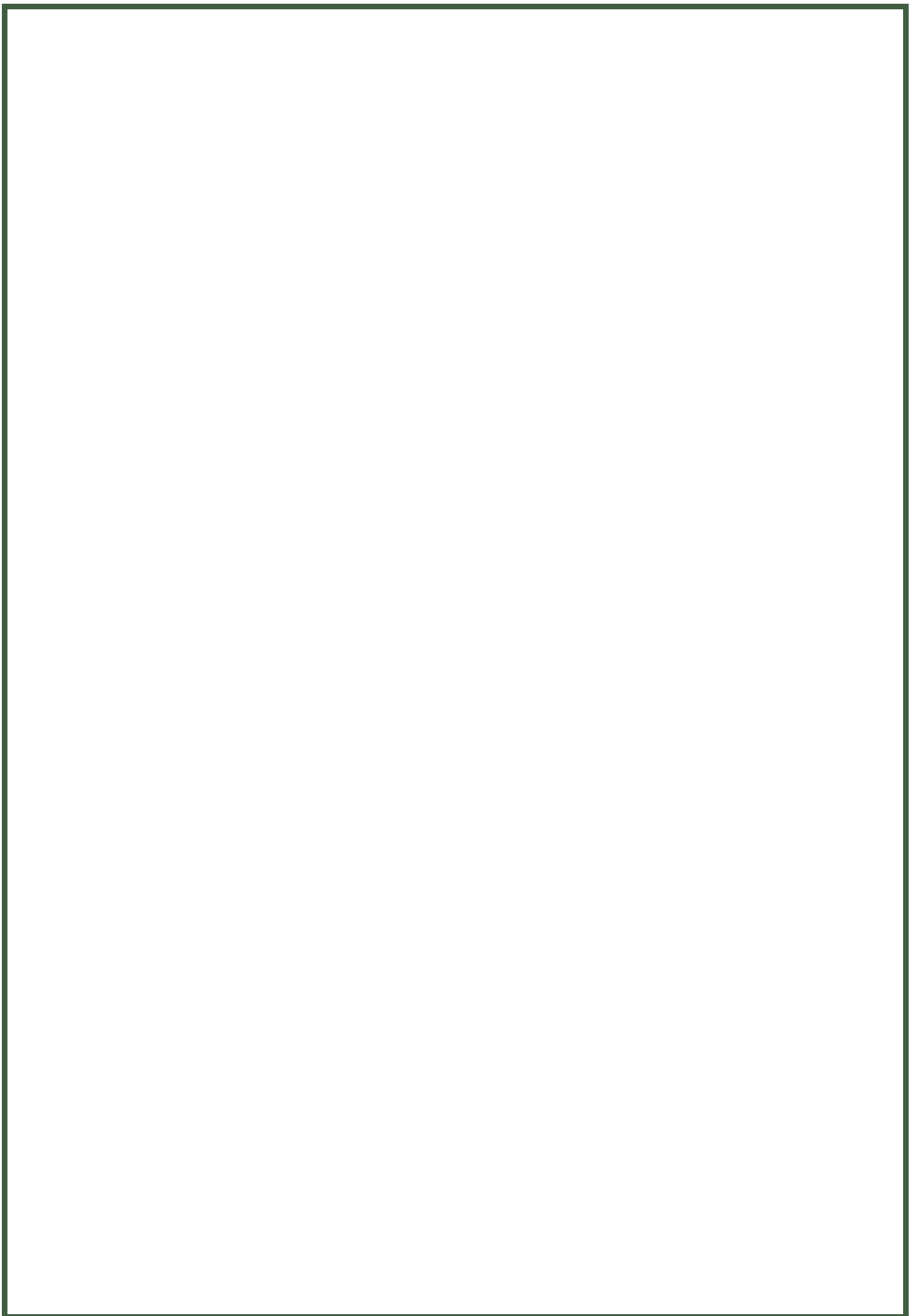
Annual Report 2022/2023

(For the year ended 31st March 2023)

‘Building on Success’



OPAL Services (Rural West Cheshire), P.O.Box 161, Whitchurch, SY13 9BG. OPAL Services (Rural West Cheshire) is a company limited by guarantee; registered charity no. 1143753; registered company no. 7521625. Registered office: 18 Utkinton Road, Tarporley, Cheshire CW6 0HS.





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Our statement of purpose

Our principal objective is to provide a benefit for older people who are in need of social inclusion because they are housebound or socially isolated and are finding it difficult to take part in social activities in their community without the support of others.



Older People Active Lives

Overview of the year, by Geoff Hope-Terry, Chair of the Board



Welcome to OPAL's 2022-23 Annual Report, and my first since being appointed as Chair. We have continued to deliver our highly valued services and overall, it's been a successful year as told through the pages of this document. On a personal note, I'm indebted to Jane Colville, my predecessor, for all her help in making sure the hand-over went smoothly and whose wise counsel I continue to benefit from.

The first task for the Board to address this year was a review of the governance structure which had expanded to tackle the problems presented by lockdown and COVID. We completed this in the summer and now have a streamlined model which allows us to work efficiently.

We've also made good progress on the financial front having achieved a small surplus for the year, an excellent result in the current economic climate. We had a major concern 12 months ago that the end of CW&C's Early Intervention & Prevention contract, which had supported the Activity Clubs for many years, could spell disaster for that service. However, we secured three new grants which went some way towards offsetting the shortfall. The difference has, in part, been met through a fantastic fundraising effort which broke all previous records. We're also immensely grateful to our bid writing team, the many external bodies who supported us with their generous grants and donations, and especially to Cllr John Leather, Mayor of Chester, who chose OPAL as one of his 3 nominated charities for the year.

OPAL would not be able to operate without its amazing volunteers and I'm pleased to report that, after a lot of hard work, numbers are back to pre-pandemic levels. We've also recently won a bid, in partnership with Snow Angels, for a highly innovative programme which aims to bolster existing volunteer bases and develop those who ultimately want to work in the Care sector.

There have been some disappointments though. Recruiting a Communications Officer took longer than hoped and we haven't made any progress on expanding awareness of OPAL and our services. Also, plans for asking our members what future services they would need have been delayed. Both of these will be tackled in 2023/24.

There are still many challenges ahead and possibly the most important activity we've undertaken this year is to produce a 3-Year Plan, summarised in this report, which addresses the issues and builds on our success.

OPAL is fortunate to have a great team. We have brilliant staff, fabulous volunteers, and an experienced, knowledgeable board. Everyone works tirelessly to support our members and my thanks and appreciation goes to all of them. I'd also like to mention those wonderful individuals who are so quick to come forward whenever the call for help goes out, regardless of how obscure the request might be. It's our people who make us so special.

Geoff Hope-Terry



Older People Active Lives

OPAL VOLUNTEER SURVEY – The results are in!

In March 2023, we carried out a survey of all volunteers and had a healthy 50% return rate. Its main findings highlighted that both new and established volunteers are generally happy and feel well supported and enjoy their time supporting OPAL.

Areas which required some improvements were to ensure volunteers feel involved in the decisions that affect their volunteering and are better informed about changes within OPAL and events. Some volunteers also felt that there could be more done to help them feel recognised and thanked.

Following on from the survey, a series of volunteer training is being organised, starting with First Aid and Dementia Awareness.

Staff and other volunteers are always friendly and supportive which makes for an enjoyable time.

I think I get as much from Opal as the Members – lovely people and friendly atmosphere

I enjoy the interaction with the clients and feel this is beneficial for both of us.

92% of OPAL volunteers feel valued and appreciated by their Organiser.

96% of members/clients appreciate the help and support OPAL gives them.

89% feel that their role is important and valuable.

94% feel it's easy to sign up for sessions and share their availability with their organiser.

84% feel they have received recognition or thanks for being a volunteer in the last year.

64% feel they are involved in the decisions that may affect their volunteering .

79% feel well informed about changes within OPAL and events.

91% would recommend volunteering with OPAL to a friend.

I feel an excellent framework is provided in which both the client and Volunteer can participate in a constructive and enjoyable manner to the fullest of their capabilities..

A well organised, interesting and caring environment, and staff providing a safe haven with activities for the elderly.

I enjoy my time speaking with the members and it is often the highlight of my week. It is hugely grounding and humbling. I am thankful I have the time, even though I often feel insignificant.



Our volunteers – making the difference!

At OPAL we have a small team of staff organisers who are supported by a team of around 200 volunteers – 27 of whom have been volunteering with us for 10 or more years! If it wasn't for our team of dedicated volunteers, we really couldn't do what we do. In the words of our staff, here's the difference our volunteers make....

“Always happy to get their hands dirty and join in with the fun.”



“They bring fun, laughter, and some unusual bingo calls (!) to every session. Without them the club couldn't run, and the members couldn't get there. I hope they realise just how much they are valued and appreciated.”

“Without our marvelous volunteers, none of our activities would be able to go ahead.”



“Good food, laughter and a sense of belonging are all achieved through the volunteers willingly giving up their time, and genuinely caring about the vital role OPAL plays in the community, and the wellbeing of our members.”



“The volunteers have been committed to the groups for a long time now, helping to keep us connected with the community and bringing smiles to every session.”

“Our valued volunteers come along to these events to help out and also to sit and chat to the carers and cared for, providing invaluable support and company.”



Opal GoOnline started in 2014 and during the last few years has held over 800 sessions at over 9 different venues. We have helped over 2500 clients... none of this could have been achieved without the help of our amazing volunteers we would like to take this opportunity to say a big thank you to all of them.”

OPAL Services in 2022-23

Community Day Services:

We were sorry to say goodbye to organiser Brenda Platt in August this year having been with OPAL from its early days.

Whilst **Tattenhall OPAL Club** carried on throughout the summer, the **Malpas OPAL Club** was relaunched in December with new organiser, Alison Shackleton, and almost all new volunteers after a six-month closure.



It was clear from the first session that the members loved being back, socialising, catching up and enjoying various activities which are planned for each week. Both clubs have weekly seated movement and monthly music sessions. They have had visits from a volunteer's two hand reared lambs and various dogs at Crufts time. A talk from the air ambulance, a shared reading session, flower arranging, decorating bird boxes, making bird feeders, and orange pomanders are only a few of our activities undertaken, not to mention the very competitive game of boules at Malpas.

Tarporley OPAL Club enjoyed lots of exciting sessions throughout the year. "We have had some wonderful times getting to know each other, with three new members starting recently. We have held quizzes, lots of Bingo and celebrated the start of Wimbledon".

Good Neighbours+ in also now in Tarporley and is regularly supporting 22 members - these are mostly social visits but with some driving and shopping included too.



Kelsall OPAL Club enjoyed a variety of activities including flower arranging, 100 Years of the BBC and tea tasting.

Frodsham OPAL Club members brought in their heirlooms for an Antiques Roadshow Day, with a talk and valuation from a local antique dealer. The Club celebrated its 8th birthday this year with a delicious pub meal.

Helsby OPAL Club numbers continue to increase with members enjoying a weekly morning session. The highlight of the summer was a trip to Spirit of the Herd Horse Sanctuary in Alvanley.



All the Clubs enjoyed celebrating the Queens Jubilee in different ways, red, white, and blue dress, knitted brooches, party games and afternoon tea.

Clubs continue to offer a regular place for older people to come and socialise, enjoy a range of activities and tasty refreshments. With transport taken care of and the support of our lovely team of volunteers, members can finally get back out of the house and be together.

Telephone Friends

In October 2022, we began Telephone Friends with additional funding from CWAC and 22 members are now benefitting from calls. This free service is aimed at older people who have great difficulty leaving their home but would like someone to chat to over the phone on a regular basis.

Through Telephone Friends, each person is paired up with one of our fantastic volunteers who rings them weekly for a general chat and to see how they are. This provides a lifeline of friendship and telephone companionship, offering a vital link with the outside world, as well as making sure they are okay.



What's Cooking

Our What's Cooking sessions continue across our area. Most people are interested in food whether it be cooking or simply eating, and they can meet and enjoy lunch or tasters as well as the company of others who find they often share similar interests. The clubs are supported by volunteers who share their own knowledge of cooking and food to create sessions which are enjoyable interesting and stimulating, whilst keeping a relaxed and friendly atmosphere for all. In

December, Julie Ennis sadly left as organiser for What's Cooking and we were joined by Alice Leech.

BreakTime Plus and Sitting Service

This year has seen a gradual return to normality for Carer Services. We saw increased numbers of carers and their cared for taking part in BreakTime Plus outings and our Sitting Service. We said farewell to organiser Joy Walker in February and welcomed new organiser, Deborah DeKock.

Highlights of the BreakTime Plus programme included a boat trip on the River Dee, pottery painting, Tai Chi exercises, a visit to the Chester Military Museum, regular visits to the



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cinema, an afternoon tea to celebrate Carers' Week, visits to an arts centre, lunch, and coffee mornings at a wide variety of garden centres and cafes across West Cheshire. We also celebrated the passing of the seasons with an Easter lunch, Christmas party celebration and a pancake party.

All our outings are a lovely opportunity for carers to have a change of scene and a chance to meet with others, either with or without their cared for person.

The Sitting Service has also continued to develop during the year, matching carefully chosen volunteers to sit with the cared for person whilst the carer has the chance to take some well-deserved time to themselves.



GoOnline and OPAL In Touch

Attendance at our GoOnline sessions has been steadily picking up since the end of the pandemic. This has taken time and we have been seeing a growing interest in at home support service.

We have explored some different venues across the wider geographical area we cover. We're always looking for places that are already popular and that people like to visit and where there is space to meet, talk, and assist those attending with their technical issues.

Our OPAL in Touch service has begun to take off and we have recruited some new volunteers to operate this service into people's own homes.

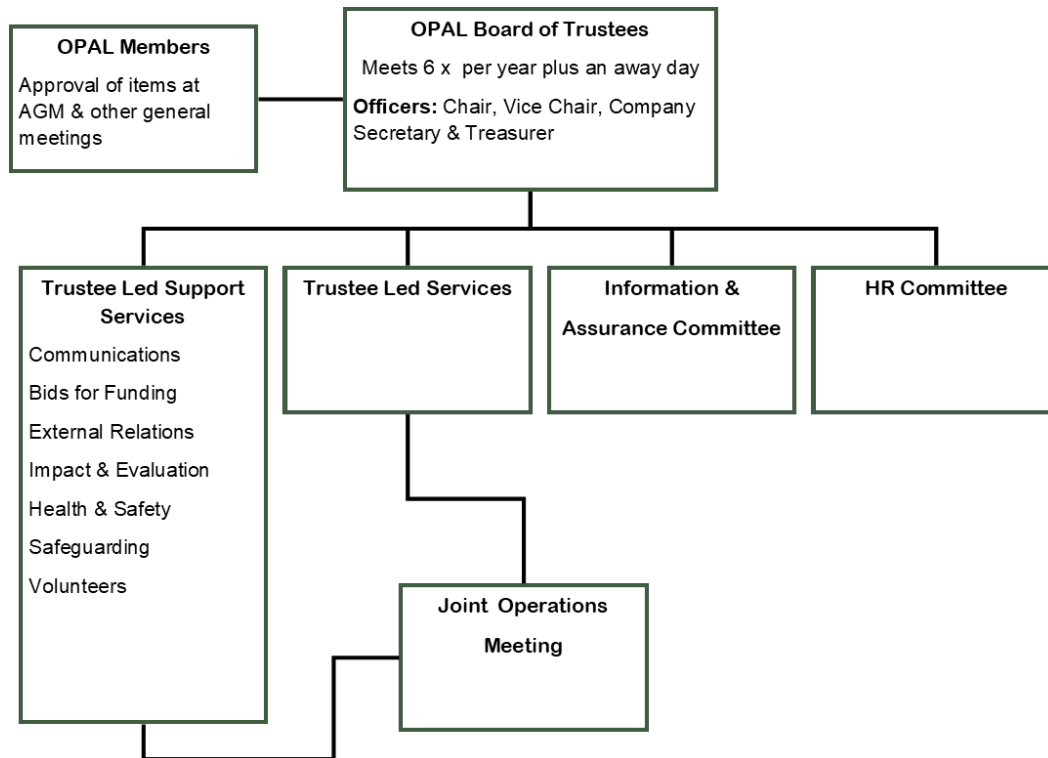
Our longstanding GoOnline volunteers deserve a mention and thanks. They stuck by us through the pandemic and have this year continued to support us and provide a service for which we, and those using the service, are very grateful.

We welcomed a new member of staff to our GoOnline team in the form of Bev Stubbs who had been a volunteer, and we were pleased to have join our staff team.

Finally, we are deeply grateful to our various funders who have provided grants which have allowed us to maintain this very important service over the year.



Our Organisational Structure



Our team



Trustees: Ian Bailey, Jan Bailey, Kevin Bradburne, Gill Clough, Jane Colville, Juliet Compston, Lesley Gough, Geoffrey Hope-Terry, Brian Mackie, Gill Swash, Julian Waring, Rhiannon Wilson.



Staff: Zoe Blocksidge, Lynda Briody, Deborah DeKock (from January 23), Julie Ennis (to January 23), Janet Handley, Maria Hudson, Morag Hutson, Alice Leech (from January 23), Yvette Owen (September 22 - January 23), Joanne Patel, Brenda Platt (to August 22), Alison Shackleton (from November 22), Beverley Stubbs (from January 23), Jean Toyn, Joy Walker (to February 23).



Our 3-Year Plan 2023/24 – 2025/26

OPAL's Mission

Our Mission is to offer accessible, enjoyable, and enabling activities for older people in rural West Cheshire, in order to reduce isolation and loneliness. We aim to benefit older people and their carers who may be housebound and / or socially isolated, and who find it difficult to be part of their community without the support of others.

Commitment to Volunteers

A key feature of all OPAL Services is that they are delivered by volunteers working as a team, side by side with staff, who provide guidance and support. Without our volunteers we could not run them as we currently do, and OPAL encourages volunteers to be actively involved in deciding how its services are run. The success of what we do can be put down to the wide range of skills, knowledge and experiences that volunteers bring. Their local knowledge helps OPAL ensure local services are available to local people. Volunteers also gain many benefits themselves from participating in the activities.

Strategy

The strategy for the 3 years is to achieve a modest degree of growth, in order to be sustainable. However, this must be on the basis of quality of service and meeting the needs of our communities and members, not growth for the sake of it. Working more closely with suitable partners will be explored as a relatively low risk approach to achieving growth.

Summary of Objectives for the 3 Years

The objectives to support the strategy are summarised below. Each one has a detailed list of specific actions and progress measures.

Over the 3 years, we will:

- Re-brand services, in line with our external message.
- Increase the geographical reach of our existing services.
- Identify at least one new service to be added into our portfolio.
- Calculate the excess 'unrestricted reserves' for investment in operations.
- Undertake a major marketing campaign which raises our profile.
- Extend our range funding sources.
- Recruit a new post of part-time Team Leader for the Organisers.
- Identify potential partners and consider working together.



Our Funders 2022-2023

Our Funders in 2022-23

**CWaC: for
OPAL Clubs,
Carers Services
& Befriending
Services**

**Cheshire West
NHS: for
'Branching
Out' services.**

**Marjorie Boddy
Fund: for
Digital
Inclusion
Services &
Branching Out**

**Masonic
Charitable
Foundation: for
OPAL In Touch**

**Awards 4 All
(National
Lottery): for
Branching Out
services.**

**Marshes Comm
Benefit Fund:
digital inclusion
services and
Branching Out**

**Cheshire
Community
Foundation to
support access
to services.**

We would like to thank all individuals, groups and organisations who have donated a total of £11,012.12 to OPAL during 2022-23.

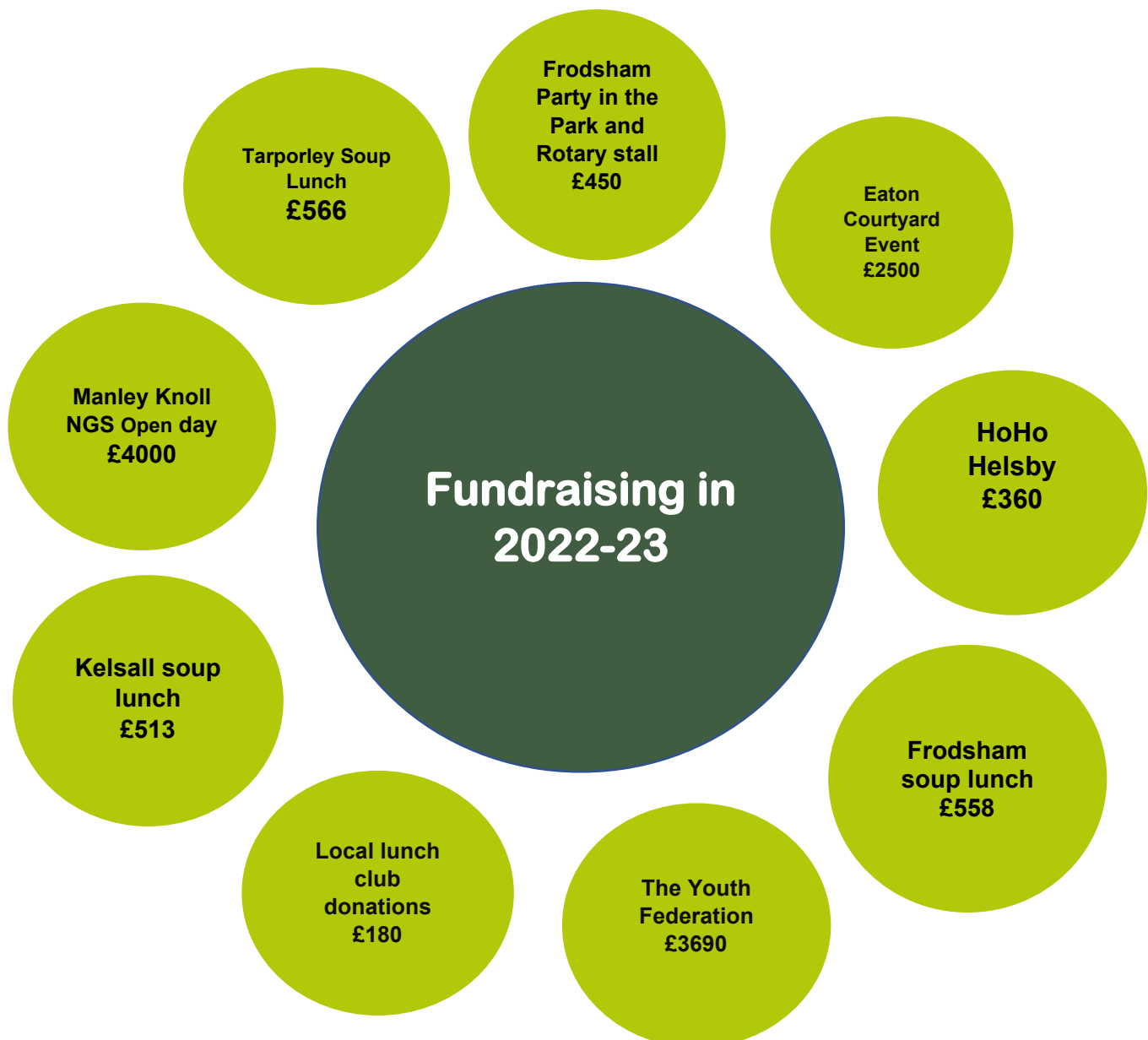
OPAL Fundraising



A fundraising group was set up last year which is made up of our wonderful volunteers, some staff, and trustees, led by Juliet Compston.

The events highlighted below have been held over the year and they have raised just over £9,000.

Many other events are being planned for the coming year – they are a busy group! If you would like to join this group or get involved with any of our events, please contact Juliet – Juliet.compston@opalservices.org.uk





We gratefully acknowledge the support of many partners who have enabled us to deliver our services in the last year....

Those supporting front line service delivery...

Providers of our OPAL venues.	The providers of training events for staff and volunteers.	Those who have led OPAL in so many activities & provided entertainment at our clubs and groups.
Social prescribers, wellbeing co-ordinators and social workers who have signposted and referred people to OPAL services.	The Malpas Minibus Committee for their help with transport.	The Library Services for publicising services as well as their willingness to undertake joint work with us around Branching Out and GoOnline.

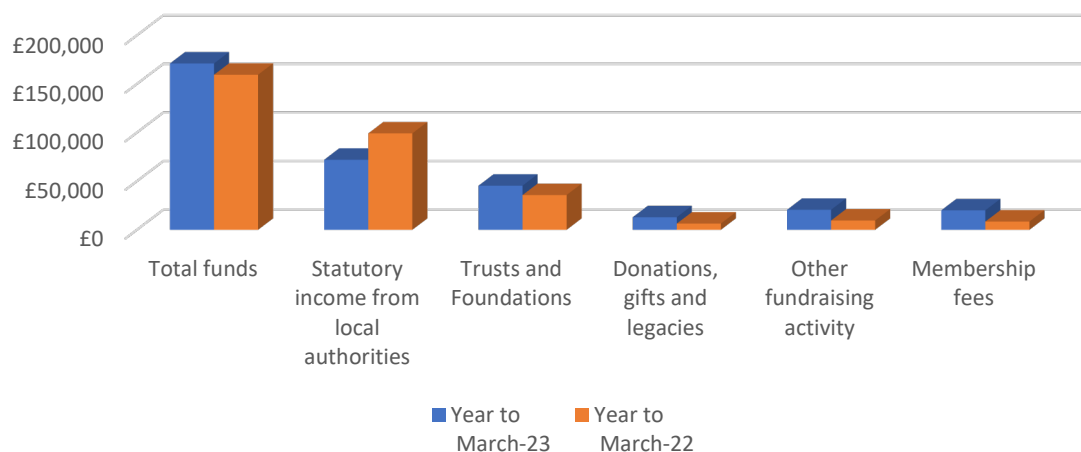
...and our wider network partners and funders

Funders and Commissioners (highlighted elsewhere) who have listened, involved, advised, and supported during the last year.	CWVA who support volunteer recruitment, provide advice, information about funding opportunities, co-ordination of training and sector leadership.	Local Parish Councils for support in disseminating information, signposting, and funding through grants.
Community Care Steering Groups providing opportunities for networking and joined up local working.	Healthwatch for their advocacy role and provision of information and training opportunities.	Age UK Cheshire for their information giving and support.
The Carers Trust for their information giving practical help, support, and advice.	Snow Angels for their presence and the close working relationship we are building.	Cheshire Community Action (CCA) for their information giving practical help, support, and advice.

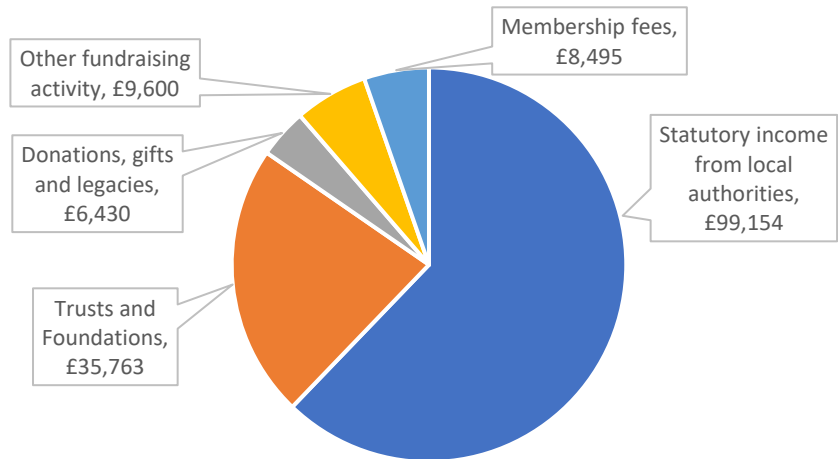
OPAL Money Matters

	Year to March-23	Year to March-22	Movement
Total funding	171,037	159,442	11,595
Staff costs	109,959	103,520	6,439
Volunteer costs	3,623	1,134	2,489
Activities	22,641	17,020	5,621
Admin	22,968	18,593	4,375
Fundraising	3,036	86	2,950
Total expenditure	162,227	140,353	21,874
Net surplus/ (deficit)	8,810	19,089	(10,279)
Reserve funds	242,182	233,372	8,810

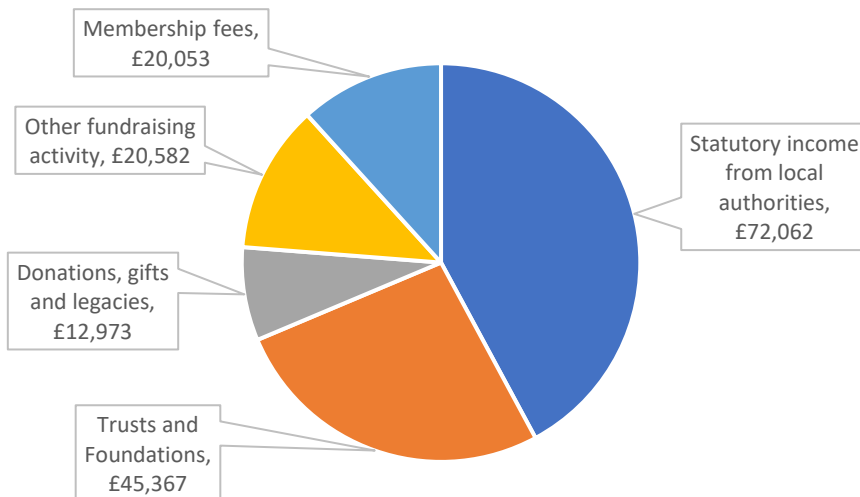
Year on year funds



Year to March 2022



Year to March 2023



Key points

- Cheshire West and Chester Local Authority funding decreased by £27,000 to £72,100, mainly due to exceptional receipt of one-off £30,000 befriending funding grant in the previous financial year.
- Trust and Charity Foundation funding increased by £9,600 to £45,400, with funders including The NHS Commission, The Marjory Boddy Charitable Trust, The Marshes Community Benefit Fund, and The Masonic Charitable Foundation.
- Donations, Gifts and Legacies of £13,000 were received in the year, which was an increase of £6,500 over the £6,400 received in the previous year.
- Other fundraising activity resulted in an impressive increase of £11,000 to £20,600.
- Recovery in club membership fees continues, increasing by £11,600 to £20,100. Although a welcome positive movement, far below the £40,000 plus levels achieved pre-Covid, illustrating the challenge we face rebuilding club activity.
- Total funding increased by £11,600 to £171,000.
- Increase in overhead was due to the combination of gear up of operational activity together with high levels of cost inflation.



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Independent Examiner

Rebecca Ellams has been re-appointed as independent examiner.

This Trustees Annual Report was approved by the Board of Trustees on 28th October 2023.

This summarised financial information contains extracts from the OPAL Services Statement of Financial Activities, a full copy of which is available by emailing morag.hutson@opalservices.org.uk

Draft Financial Statements at 26 October 2023 at 15:05:44
OPAL SERVICES (RURAL WEST CHESHIRE)

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF OPAL SERVICES (RURAL WEST CHESHIRE)

I report to the trustees on my examination of the financial statements of OPAL Services (Rural West Cheshire) (the charity) for the year ended 31 March 2023.

Responsibilities and basis of report

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the financial statements of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the financial statements to be reached.

Rebecca Ellams FCCA
Hall Livesey Brown

HLB House
68 High Street
Tarpotley
Cheshire
CW6 0AT

Dated: 30/10/23



Draft Financial Statements at 26 October 2023 at 15:05:44
OPAL SERVICES (RURAL WEST CHESHIRE)

BALANCE SHEET
AS AT 31 MARCH 2023

	Notes	2023		2022	
		£	£	£	£
Fixed assets					
Tangible assets	12		3,116		3,975
Current assets					
Debtors	13	1,786		3,768	
Cash at bank and in hand		278,536		257,058	
		<u>280,322</u>		<u>260,826</u>	
Creditors: amounts falling due within one year	14	<u>(41,255)</u>		<u>(31,428)</u>	
Net current assets			239,067		229,398
Total assets less current liabilities			<u>242,183</u>		<u>233,373</u>
Income funds					
Restricted funds	15		52,616		62,113
<u>Unrestricted funds</u>					
Designated funds	16	44,031		45,068	
General unrestricted funds		<u>145,536</u>		<u>126,192</u>	
			<u>189,567</u>		<u>171,260</u>
			<u>242,183</u>		<u>233,373</u>

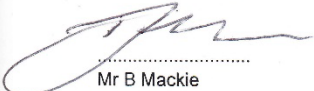
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2023.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 28/10/23


Mr B Mackie
Trustee

Company registration number 07521625



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Company information

OPAL Services (Rural West Cheshire) is a company limited by guarantee.

Charity name:	OPAL Services (Rural West Cheshire)
Registered company no:	7521625 (England and Wales)
Registered office:	18 Utkinton Road, Tarporley, Cheshire CW6 0HS
Date of Incorporation:	8th February 2011
Date activities commenced:	22nd May 2011
Accounting reference date:	31st March
Registered charity no.	1143753

Board of Trustee Directors 2022-23

Mr Ian Bailey	From March 2021
Mrs Jan Bailey	From March 2021
Mr Kevin Bradburne	From June 2021
P Cllr Mrs Gill Clough	From February 2011
P Cllr Mrs Jane Colville	From February 2011, Chair to August 2022
Mrs Juliet Compston	From March 2022
Mrs Lesley Gough	From June 2021, Secretary from September 2021
Mr Geoff Hope-Terry	From March 2022, Chair from August 2022
Mr Brian Mackie	From March 2020, Treasurer from March 2020
Mrs Gill Swash	From July 2017
Mr Julian Waring	From May 2022 to May 2023
Mrs Rhiannon Wilson	From September 2019

Company Secretary Lesley Gough

Independent Examiner Rebecca Ellams FCCA, Hall Livesey Brown, HLB House, 68 High Street, Tarporley, Cheshire CW6 0AT

Bankers The Co-operative Bank plc, PO Box 101, 1 Balloon Street, Manchester M60 4EP