

“Older people can have more influence by knowing how to get information...”

“Counsel and Care has a great deal to be proud of in terms of elevating itself to one of the most significant organisations... for older people” “I really like knowing that I can speak to someone who can help me” “Thank you to Counsel and Care for their enormous contribution to this debate... It continues to inform our thinking...”

annual review 2009  
making an impact: moving forward

# About Counsel and Care

Counsel and Care is the national charity working with older people, their families and carers to get the best care and support.

We reach around 250,000 people, providing in-depth, personalised independent advice over the telephone, through our 64 guides and factsheets, and through our website. And we reach many more people through our media coverage – for example in June 2009 circulation figures featuring Counsel and Care’s name amounted to over 6.5 million.

We work to influence government policy by highlighting the concerns and experiences reported to our advice service in policy papers, articles, and at events. We also run stakeholder engagement projects to further involve older people in the influencing work that we do.

In the past year, the organisation has grown and now has a 20 strong staff team. Our team is diverse, focused and committed, and will continue to ‘punch above its weight’, to fulfil our aim of improving care and support for older people, their families and carers.

*Mrs. D contacted us as her elderly mother was seriously ill in hospital and the recommendation was that she would be discharged into a care home. Mrs. D’s mother had been turned down for NHS continuing care funding but Mrs. D disagreed with the decision. Mrs. D reported to the advice worker that she had felt the assessment was ‘shallow’ and had been carried out with a ‘tick box mentality’ with no intention of agreeing to this level of funding. Mrs. D was told by the social worker that the ‘primary care trust (PCT) never funds health care’ and she wanted to know if the PCT could operate such a blanket policy.*

*Following the discussion with one of Counsel and Care’s advice workers Mrs. D formerly challenged the PCT’s decision, and her mother was provided with palliative care on discharge from hospital. Mrs. D’s comments to Counsel and Care: “I would firstly like to thank you for your advice and assistance. Until that day I had felt so alone in my attempts to obtain NHS continuing healthcare for my mother, or indeed whether I was reading and understanding the national framework guidelines correctly and objectively. Our conversation has assured me that I am correct in my assumptions. The service also gave me reassurance and reduced the stress and anguish which I was suffering. The service has reduced my uncertainty and the objective advice has given me strength and knowledge to fight on.”*

Counsel and Care is grateful to The Roman Group for their support in the printing of this annual review



Counsel and Care’s staff team

Cover quotes:

*“Older people can have more influence by knowing how to get information...”*  
VotingAge event delegate

*“Counsel and Care has a great deal to be proud of in terms of elevating itself to one of the most significant organizations...for older people”*  
Phil Hope MP, Care Services Minister

*“I really like knowing that I can speak to someone who can help me”*  
a caller to the advice line

*“Thank you to Counsel and Care for their enormous contribution to this debate... It continues to inform our thinking...”*  
Phil Hope MP, Care Services Minister

# Doing more for less: Britain faces some huge challenges in the next decade. One of the biggest is how we fund and deliver better care for older people and their families and carers, wherever they live. Our ageing population means that more and more older people need care and support; we cannot ignore this challenge.

In the last year Counsel and Care has been responding to the challenge in two main ways. We have expanded our unique advice service to help more people get the care and support they need. And we have helped lead the debate about how we pay for better care in the future. This report demonstrates our growing impact and how our advice service informs our campaigning work.

We have delivered ‘more for less’ – while our spending in 2008-9 was less than in 2007-8, we did a lot more. This is in part due to a growing number of partnerships – with local authorities, whom we are supporting to deliver universal information and advice, and with a range of national organisations with common goals.

In the next three years we are planning to do much more. We want to ensure that care and support for older people is high up the agenda in the run up to the general election and for the incoming government. And we want to help more individuals through our advice service and through the FirstStop service.

Whatever happens politically and economically, we know that more older people and their families will need the personalised, in-depth advice that we provide. We will be working with a growing number of local organisations to make this happen. And we will be working with older people to make sure that what they want shapes the future.

Finally, we would like to thank our supporters, funders, partners, members, trustees, staff and volunteers for all they have done to make this possible. We look forward to working with you in the coming year to get the best care and support for older people, their families and carers.



Sushil Radia,  
Chairman



Stephen Burke,  
Chief Executive

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Stephen Burke, Chief Executive

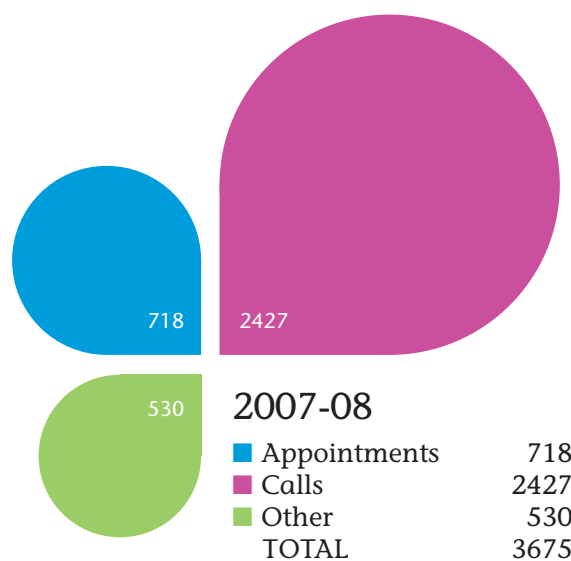
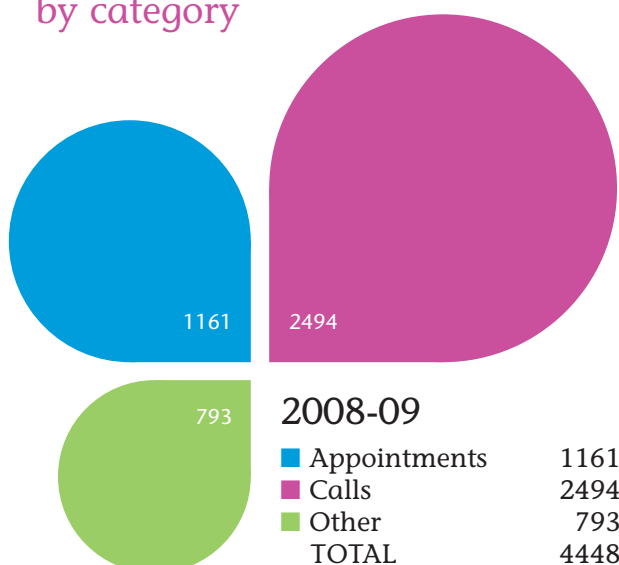
## Caring and informing: The new service delivery model adopted by Counsel and Care’s advice team in 2007 has proved a great success, enabling the advice service to assist even more enquirers needing quality information and advice on complex community care issues.

With the two tier service model, our first tier advice workers can answer more calls on our busy advice line number, offer dedicated half hour telephone appointments with our experienced second tier advice workers for more in-depth, complex cases and time to build practical strategies to help support the needs of vulnerable older people.

The chart on the right shows the increase in calls handled during the past year by our advice line, the increase in enquiries made to the advice team by ‘other’ means, e.g. email enquiries, letters, and calls through our partnership work with Help the Aged, the Nursing Home Fees Agency (NHFA), and the Elderly Accommodation Counsel on the FirstStop project, over the last three years. The number of appointments section demonstrates the amount of half hour telephone appointments used by enquirers with our trained, experienced advice workers for complex discussion. The calls section shows the number of calls taken by our first tier advisers who deal with the more straightforward requests for information.

“you are the first organisation I have spoken to that has been able to offer a positive way forward. I have been going from pillar to post”

Number of calls to the advice line by category



**Working in partnership:** In the past year, Hampshire County Council and Westminster City Council have commissioned our advice service to provide in-depth advice and information for their residents. By working in partnership with local authorities we can reach people who might not normally contact social services and so help local authorities achieve their target of providing advice and information to all. We also provide the local authority with substantial feedback, which can help them minimize future problems. A growing number of authorities, housing providers and employers are showing an interest in commissioning our advice service and we are looking to develop this area over the next year.

## The difference our work has made

Every enquirer to our advice service using our appointment system receives individual, personalised advice from our highly trained and experienced advice workers. During the half hour telephone appointment the advice worker explores practical strategies to help the enquirer overcome their difficulties, and discusses the different options that may be available to them. If required the advice worker follows up the call with a tailored letter summarising what has been discussed and referring to any necessary government guidance and legislation that would help resolve their issues. Enquirers can continue to use our service until they feel the situation has been satisfactorily resolved.

### Top ten enquiries to the advice service

- 1 Request for general information how to access care and support
- 2 Issues relating to care home funding
- 3 Enquiries relating to a person with mental health issues
- 4 Issues relating to people self funding their care
- 5 Enquiries about how to make an official complaint
- 6 Enquiries relating to the assessment process for services
- 7 Enquiries from individuals seeking charitable funding for essential items
- 8 Enquiries relating to carers
- 9 Enquiries relating to hospital discharge
- 10 Enquiries about home care

“the advice is very impressive given that it is free to access”

### *Mrs L contacted the advice service on behalf of her elderly parents.*

*Mrs L's father had recently had to move into a care home leaving his wife living in their own property. Mrs L's mother decided that she would like to sell the large family home (co-owned with her husband) to purchase a smaller property nearer to her daughter and grandchildren but social services inferred to Mrs L's mother that her husband's share of the property would have to be used to pay his care home fees if she sold the property. Mrs L's mother was concerned as she would not be able to afford a property with only half the proceeds, and felt that she would have no option but to remain in the property which was too big for her to look after and a distance away from her family.*

*The advice worker advised how the proceeds of the shared property should be treated by the council in this situation, based on government guidance ('The Charging for Residential Accommodation Guide'). With the information provided by the advice worker Mrs L reminded the council that her father could give some of his share of the proceeds to help his wife purchase a suitable home for her to live in, so that she could afford the bungalow close to her family, and her husband's care home.*

*Mrs L told Counsel and Care: "Thank you so much for your very prompt and comprehensive reply. It was really appreciated and I am so grateful for your time and expertise in answering this question for us. I cannot explain how much help your service and prompt reply has been to us. It has greatly relieved my mother's anxiety at a time when she is trying to cope with many difficult changes. Thank you so much".*

**A care system for the 21st century:** Our external facing work has continued to make an impact during 2009. For another year, Counsel and Care has been commended for its insight, its thoughtful approach to influencing, and for the way that it has positioned itself alongside larger charities as an important voice in the care and support debate.

We have completed a wide range of projects and new publications this year, and we are grateful to our partners and funders that have supported us to deliver the high quality work that we have become known for.

The influencing work of Counsel and Care would not be possible without the challenges that are raised each day by the people who contact the advice service. The key issues raised last year on the advice line informed a policy paper published in January 2009, *Finding and Financing Care in Hard Times*. The paper focused on the challenge of getting the right care at the right time, in the middle of an economic downturn.

The Policy and Communications team work closely with the advice team in keeping our ever-increasing range of guides and factsheets up to date. To promote our jointly produced advice guide on sensory impairment, supported by the Thomas Pocklington Trust and Sense, the deafblind charity, we were invited to exhibit alongside Sense at their annual conference in Birmingham in June 2009, attended by Sense's patron HRH the Princess Royal.

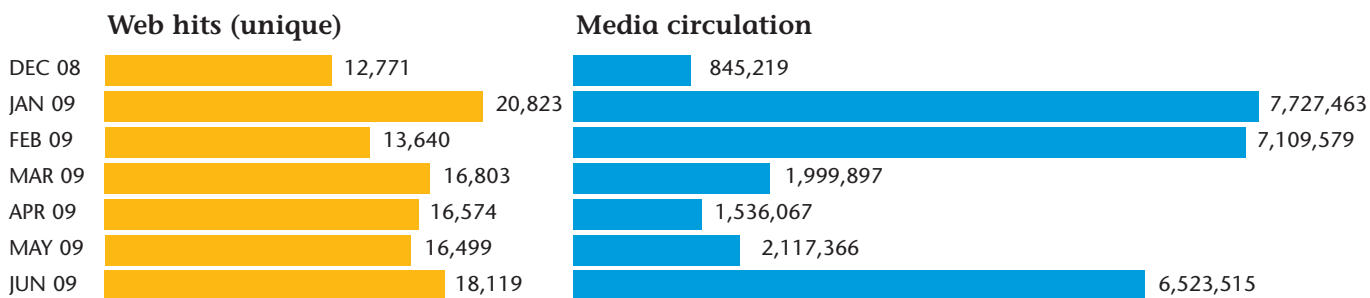


**“Thank you... to Counsel and Care for their enormous contribution to this debate. The body of work they’ve produced, the reports, the research ideas - have been prodigious and impressive”**



*Phil Hope MP, Care Services Minister, speaking at Counsel and Care’s annual conference, February 2009*

**Making an impact:** during 2009 we have continued to increase our media coverage and external reach via the internet and our publications



In May 2009 our *VotingAge* manifesto was published and received a great deal of media coverage nationwide. The manifesto will be used as Counsel and Care’s influencing tool as we engage with government and opposition parties between now and the general election.

Our policy programme *Fairness in an Ageing Society*, delivered together with Housing 21 and the Fabian Society, held a range of successful events, culminating in a conference at which the keynote speaker was Vince Cable MP, Treasury spokesman for the Liberal Democrats.

Finally, Counsel and Care continues to develop new partnerships with organisations who wish to draw upon our ability to influence and make a difference to the lives of older people, their families and carers. We are working with a range of partners to create ideas for new events and policy influencing tools to raise profile and contribute to the care and support debate. We will work with older people to help them to engage with the Department of Health’s Big Care Debate, initiated by the social care funding Green Paper, *Shaping the Future of Care Together*. This is a crucial time to influence care and support as we look towards a White Paper in 2010, and the next general election.



“Don’t let the writing of the manifesto be the ‘end’ in itself. Let this be the start and continue to work for implementation at the very top of power”

We are building a new national network of befriending schemes for older people to combat loneliness. *VitalLinks* will enable befriending schemes to share good practice and make it easier for older people, their families and potential volunteers to find a befriending scheme. Scheme coordinators and practitioners can join the network at [www.counselandcare.org.uk/networks/vitallinks](http://www.counselandcare.org.uk/networks/vitallinks) and be listed in our forthcoming online directory.



**Building our future:** In 2008-9 Counsel and Care delivered a lot more while making a small financial surplus. This was made possible by keeping our spending just below what was spent in 2007-8 while working to increase our income. The surplus will go towards building our reserves but we are still a long way from achieving our target of having six months reserves.

These headlines disguise quite a number of financial changes during the year.

On the income side, we saw a big drop in legacy income to the lowest level for many years. As ever, whilst much appreciated, this always is very variable and makes budgeting hard but we have been making efforts to diversify our income from trusts and foundations and from income generation. With many trusts and foundations experiencing a drop in income themselves, it is increasingly important that we broaden the range of trusts that we approach for grants and donations. At the same time we have been developing income generation by selling our advice service to local authorities and by working in partnership with a number of organisations.

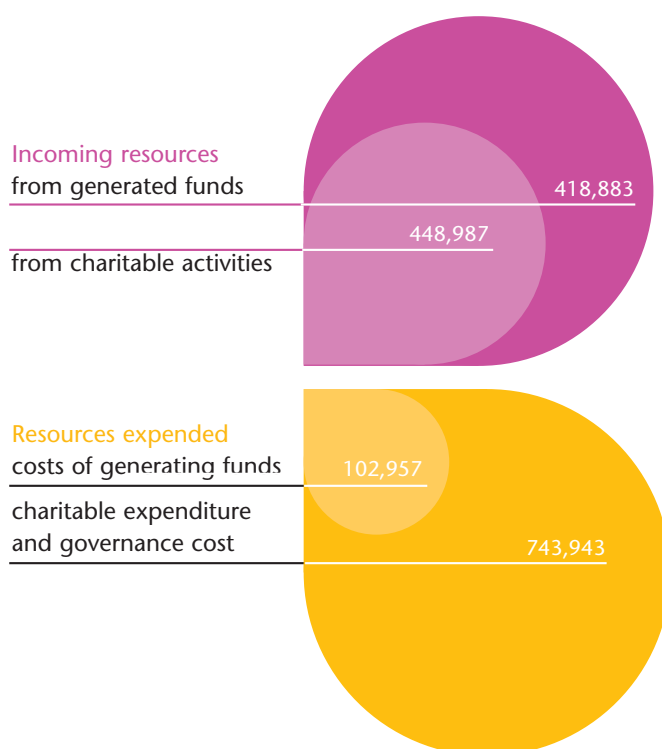
In the coming year we hope to build on our contracts with Westminster City Council and Hampshire County Council, as well as partnerships with Housing 21, Tunstall and the Resolution Foundation.

We were also delighted despite the economic downturn that donations from individuals were maintained during 2008-9, reflecting the strength of support for the charity's work from its members and donors.

On spending, as this report demonstrates, we achieved a lot without spending more in 2008-9. This is due to the hard work of the staff and our partnerships with other organisations which have produced significant public benefit.

We are very grateful to everyone who has funded and supported Counsel and Care in 2008-9. In the coming year we will continue to strive to deliver 'more for less' and get best value from all the funds raised by the charity.

Antony Cox  
Honorary Treasurer



## Summary of Accounts 2008-09

<b>Incoming Resources</b>	£
<b>Incoming resources from generated funds</b>	
Voluntary income	237,560
Activities for generating funds	179,840
Investment income	1,483
<b>Incoming resources from charitable activities</b>	
Advice Services to older people	423,237
Policy and Communications	25,750
<b>Total</b>	<b>867,870</b>
<b>Resources Expended</b>	£
Cost of generating funds	102,957
Charitable Expenditure	
Advice Services to older people	489,129
Policy and Communications	220,077
Governance costs	34,737
<b>Total</b>	<b>846,900</b>

# Main supporters of Counsel and Care

- Arthur Hurst Trust
- Albert Van De Berg
- Army Benevolent Fund
- The Big Lottery
- BUPA Giving
- Busy Bees Care Vouchers Ltd
- Calouste Gulbenkian Foundation
- Comic Relief
- Donald Forrester Trust
- Dowager Countess Eleanor Peel Trust
- FirstStop Care Advice
- Francis Winham Foundation
- G M Morrison Charitable Trust
- Garfield Weston Foundation
- H K Health Learn
- Hackney Parochial Charities
- Hampshire County Council
- Hanover Housing Association
- Housing 21
- IndependentAge
- Inman Charity Trustees Ltd
- Joseph Strong Frazer Trust
- Lloyds TSB Foundation
- Miss D B Simpson Charitable Trust
- Mrs F B Laurence Charitable Trust
- Mrs Maud Van Norden's Charitable Foundation
- Notting Hill Housing Trust
- Resolution Foundation
- Richard Cloudsley's charity
- Rosemary Pease Charitable Trust
- Scouloudi Foundation
- Sir John Sumner's Trust
- SweetTree Home Care Services
- The 29th May 1961 Charitable Trust
- The Albert Hunt Trust
- The Beatrice Laing Trust
- The Britwell Trust
- The Charles Hayward Foundation
- The Charlotte Bonham-Carter Charitable Trust
- The City Bridge Trust
- The Danego Charitable Trust
- The Drapers' Company
- The Eveson Charitable Trust
- The Freemasons' Grand Charity
- The Frognal Trust
- The Fuserna Foundation
- The George A Moore Foundation
- The Hampstead Wells and Campden Trust
- The Henry Smith Charity
- The Herbert & Peter Blagrove Charitable Trust
- The Hull & East Riding Charitable Trust
- The John Ellerman Foundation

- The Nuffield Foundation
- The Persula Foundation
- The Rank Foundation
- The Royal Air Force Benevolent Fund
- The Souter Charitable Trust
- The Stanley Foster Charitable Trust
- The Tudor Trust
- The Underwood Trust
- The Worshipful Company of Coopers
- Thomas Pocklington Trust
- Tomkins Plc
- Trustees of Elsie Lawrence Deceased
- Tunstall
- Westminster Advisers
- Westminster Amalgamated Charity
- Westminster City Council

## Legacies

- Barry Hart Parsons
- Betty Tahourdin
- Beryl Womack
- Dorothy Jean Billson
- Ellen Winifred Poyton
- Fredrick Henry Hill
- Graham Morson
- Isobel Menzies Lyth
- Gabrielle Margaret Turner
- Stanley William Harrad



# Who's who at Counsel and Care

## Patron

- HRH The Duchess of Gloucester GCVO

## Founders

- Bob Graham OBE (deceased)
- Mrs Joceline Graham

## President

- Miss Davina Hodson

## Vice Presidents

- Baroness Emerton DBE DL
- Baroness Flather JP
- Baroness Turner of Camden
- Dr Eric Midwinter
- Mr Derrick Mead LVO
- Mrs Catherine Belton
- Mrs Marjorie Saywood
- Ms Eleanor Bron
- Professor Peter Millard
- Sir Patrick Moore, CBE, OBE
- Viscount Tenby JP

## Chairman

- Mr Sushil Radia

## Vice Chairman

- Miss Pamela Hibbs CBE

## Honorary Treasurer

- Mr Antony P Cox

## Council Members

- Dr Clive Bowman
- Dr Stephen Webster
- Dr Tom Denning
- Mr John Dennis
- His Honour Judge Dight
- Mr Brian Dowling
- Mr Malcolm Dean
- Mrs Joceline Graham
- Mr Rupert Symons
- Mrs Valerie Barrow
- Ms Alison Knapp

## Chief Executive

- Mr Stephen Burke

## Counsel and Care staff and volunteers

Stephen Burke, *Chief Executive*

Donna Peart, *Executive Assistant*

### Advice Team

- Gill Coombs, *Advice Service Manager*
- Garry Macdonald, *Senior Advice Worker*
- Emma Williams, *Advice Worker*
- Marie Morris, *Advice Worker*
- Pat Lacroix, *Advice Worker*
- Nisa Tanin, *First Tier Adviser*
- Sandra Koranteng, *First Tier Adviser*
- Trevor Greenidge, *First Tier Adviser*
- Rita Jahan, *Advice Service Volunteer*

### Finance and Administration

- Padma Sivapunniam, *Finance Manager*
- Sharon Ridsdale, *Senior Administrator*
- Suzanne Kimpiatu, *Finance and Administration Volunteer*

### Development, Income Generation and VitalLinks

- Michael Stuart, *Development Manager*
- Kathleen Gillett, *VitalLinks Befriending Coordinator*
- Helen Finch, *Development Officer*
- David Mellor, *Income Generation Volunteer*
- Nana Apprey-Abraham, *VitalLinks Volunteer*
- Ria Booth, *VitalLinks Volunteer*
- Trisha Daniel, *VitalLinks Volunteer*
- Alma Erlich, *VitalLinks Volunteer*
- Gwen Hewitt, *VitalLinks Volunteer*
- Francesca Riches, *VitalLinks Volunteer*

### Fundraising

- Helen Dunkerley, *Fundraising Manager*
- Anna Eklund, *Fundraising Volunteer*

### Policy and Communications

- Caroline Bernard, *Policy and Communications Manager*
- Maureen Jackson, *Project Officer*
- Anna Passingham, *Senior Policy and Communications Officer*
- Laura Bennett, *Information Officer*
- Laura Davis, *Policy and Communications Volunteer*

### Solicitors

Farrer & Co., 66 Lincoln's Inn Fields, London WC2A 3LH

### Auditors

haysmacintyre, Fairfax House, 15 Fulwood Place, London WC1V 6AY

### Bankers

The Royal Bank of Scotland, London, Camden Town Branch, 189-191 Camden High Street, London NW1 7BP

# Support our work: make an impact

## Impact

'Impact' has been the buzz word for charities and funders for a while but during the present economic climate it is a word which has become even more important for charities. Times are hard and competition for funds is even stronger so in the past year Counsel and Care has continued to work towards demonstrating our impact even more.

We have monitoring and evaluation systems in place but specifically for our advice service work the nature of this work makes it hard to evaluate its full impact. In the next year we hope to carry out a project to evaluate our advice work to enable us to present more evidence and outcomes to our current and future funders to show the full impact of our work.

## Supporters

We would like to thank all of our donors, members and funders in the last year for their financial support especially during this difficult time. We have been awarded new grants from a number of large grant making trusts towards our advice service, policy and income generation work, and Vital Links befriending project. Counsel and Care is fortunate to have the support of a number of long term funders who fully understand the importance of our work in getting the best care and support for older people, their families and carers across the UK.

*"We believe your excellent routine work advising older people on so many issues gives you the evidence and conviction to influence positively Government and social policy. You know how older people are, what they think and feel and what works! And you are skilled, sensitive but determined campaigners."*

Tim Glass, Director of the John Ellerman Foundation, currently funding Counsel and Care's policy work.

## Events and membership

Fundraising through trusts and foundations continues to be our main source of income. However, Counsel and Care's participation in the 2008 British 10K London Run with 18 runners taking part and fundraising for our work was a great success in raising new income and awareness for our work. Counsel and Care will be taking part in this event for the next few years.

We are very grateful for the continued support of our members many of whom have been supporting us for over 20 years. Our membership base continues to increase and we had an excellent response to our membership survey carried out in the last year.



If you would like to find out more about how you can support us, please visit the "support us" section of our website:  
[www.counselandcare.org.uk](http://www.counselandcare.org.uk)

Alternatively contact our Fundraising Manager on 020 7241 8525 or email [helen.dunkerley@counselandcare.org.uk](mailto:helen.dunkerley@counselandcare.org.uk)

## Help Counsel and Care support older people, their families and carers

PLEASE DONATE TODAY

£30    £50    £100    £200

Other £ \_\_\_\_\_

**If you donate £30 or over, you are entitled to membership**

Yes, I wish to have membership status  
 No, I do not wish to have membership status

I enclose a cheque/CAF voucher/postal order made payable to **Counsel and Care**

Or Charge my Access/Visa/Mastercard/Switch

Number of card

Valid from date       Expiry date

Issue number  (Maestro/Switch)

3 digit Security Number

Name on card \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

### Gift Aid it

As an income tax payer, I wish Counsel and Care to treat this donation and any further donations I make from this date of declaration until I notify otherwise, as a Gift Aid donation\*.

Signature \_\_\_\_\_

Date \_\_\_\_\_

\* You must pay an amount of income tax or capital gains tax that is at least equivalent to the tax we reclaim from your donation. Please remember to notify us of any changes in your tax status.

Title \_\_\_\_\_ Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_ Postcode \_\_\_\_\_

Tel \_\_\_\_\_

Email \_\_\_\_\_

Please send me more information on:

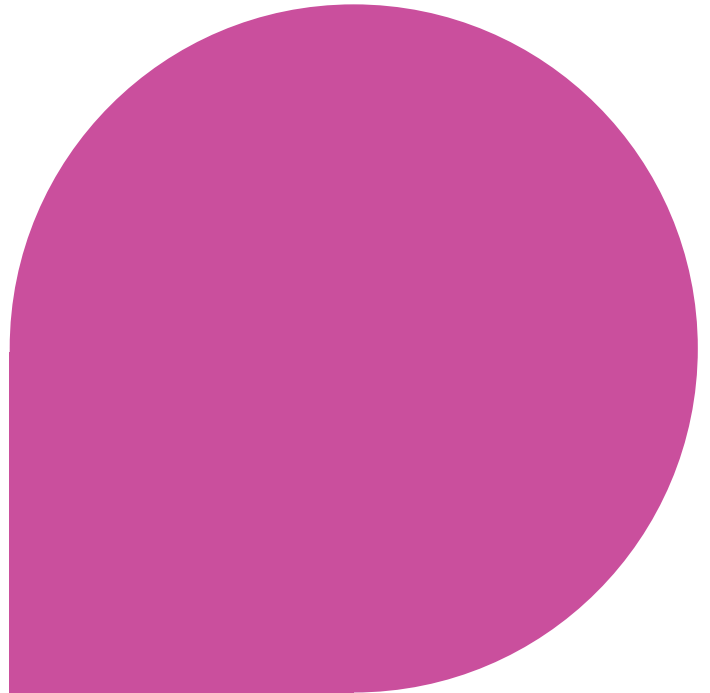
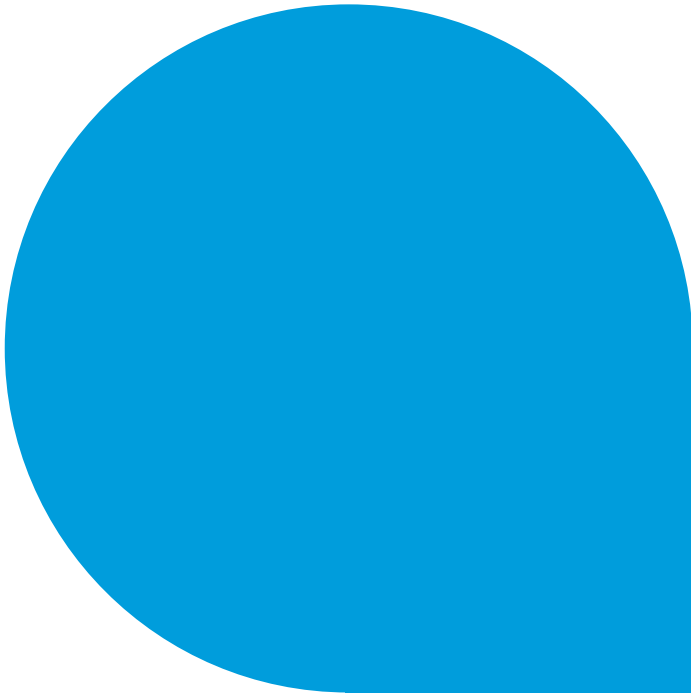
- Your services
- Leaving a gift in my will
- Making a regular gift
- Corporate giving
- Membership
- In Memoriam gifts
- Events

### Counsel and Care

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



“I support Counsel and Care because you persuaded me that you filled a need no other organisation for the elderly met” Long term member



**Counsel and Care**  
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**ADVICE LINE: 0845 300 7585**  
(local call rate)

