



Older People Active Lives

## Annual Report 2021/22

(For the year ended 31<sup>st</sup> March 2022)

# Post Pandemic: The Return Journey



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**

To promote social inclusion amongst older people and their carers in rural West Cheshire who are, or could be, socially excluded from society, or parts of society, as a result of their age or circumstances.



## A message from Jane Colville, Chair of the Board of Trustees

Last year saw OPAL rebuilding its services as the pandemic receded. Whilst our COVID safety measures meant that progress was interrupted we did persist so that by September all our services were in operation and the numbers using them was rising slowly. This however was thwarted fairly frequently by the virus that would select a member of staff, volunteer or member to infect so that they and often others were prevented from going about their normal OPAL business. It became necessary for all to think on their feet and have contingency plans to fall back on. This was a frustrating period requiring many reviews of safety measures and guidance.

During 21/22 we said goodbye to Sam Moggan, our Tarporley Club Organiser and Communications Officer. Sam had brought much to OPAL and has been missed. We welcomed three new staff, Joy Walker and Maria Hudson who joined our carer support services team and Joanne Patel who was appointed as Club Organiser for Tarporley and is providing some additional support to carers. They have joined a strong and talented staff team which we are very proud of.

Our Board of Trustees has been strengthened with the appointment in June of Lesley Gough who has since taken on the role of Secretary and Kevin Bradburne who brings with him extensive experience of work with young people and as a magistrate. We have also appointed Juliet Compston who brings with her experience in event management and fundraising which will be extremely useful. Early in 2022 we were delighted to be approached by Geoff Hope-Terry who was aware we were seeking a replacement Chair and was willing to be considered for this. As a result, Geoff who is now a Trustee is to take over the role of Chair from me in July 2022. OPAL will continue with a strong Board of Trustees who between them have many skills and strengths. In June 2021 we said goodbye to Philip Hearfield who had been our Secretary and who supported us well through the pandemic. John Webb who had been a Trustee from the inception of OPAL left at the end of March 22 and we are very appreciative of all he has offered the organisation over a ten year period.

Our volunteers continue to impress with their loyalty and commitment and although the last two years have seen a reduction in numbers this was to be expected and the recruitment of new volunteers has happily continued.

Before I hand over to Geoff to add a few words, I'd like to express my pleasure to have been able to work with all involved in OPAL, whether as a fellow trustee, member of staff, volunteer, member, funder or supporter. It has been a positive and rewarding experience and though exhausting at times, one I have no regrets whatsoever.

*Jane Colville*



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## A message from Geoff Hope-Terry, incoming Chair of the Board of Trustees

When I made enquiries about OPAL, before deciding to apply to join the Board, I was struck by one thing; everyone said it what a great organisation it was. I quickly understood why. The front-line volunteers, supported by the staff team and my fellow Trustees, all pull together to ensure that our lovely Members receive the wonderful kind of experience that they deserve. I approach my new role with a large amount of pride, mixed with an equal measure of trepidation. The reason is that Jane is, to quote everyone who knows her, “an impossible act to follow.” She has been in OPAL for more than 10 years and her commitment is second to none. If I try to measure myself against her, I know I will fall short, but I believe I bring some different skills that will be of benefit.

As I look ahead to the coming year, I have to recognise that we face a number of challenges, particularly in relation to our income levels following changes in the funding available for our Clubs. However, the Board has been quick to acknowledge the problem and start drawing up recovery plans. We have strong reserves and I’m confident that we will be able to continue to run our services, which are so important to the lives of rural West Cheshire’s elderly residents.

*Geoff Hope-Terry*





## Key actions from the last annual report

Action	Status	Comments
Re-establish services which involve face to face contact in a COVID secure way	✓	Completed through a gradual process during 21-22
Maintain a range of remote services which are available to those unable or unwilling to leave their own homes	✓	Provided alongside the face-to-face services as they have re-opened in 21-22
Develop training plans for staff, volunteers and trustees	✓	A range of training opportunities are now offered which will form part of a comprehensive training plan
Explore the possibility of providing an improved service for older people with dementia and their carers living in rural west Cheshire	<i>Ongoing</i>	Training offered to staff and volunteers and will be part of a review of members views on services in 22-23
Further develop our Branching Out service	✓	Now extending beyond Frodsham, Helsby and Farndon with new locations being developed in Kelsall and potentially Malpas
Establish our OPAL InTouch service working alongside OPAL Go Online	✓	The two services now operate together successfully

## Key actions for 2021/22

- Successfully hand over the Chair from Jane Colville to Geoff Hope-Terry
- Streamline our structure, post COVID
- Work with CW&C to remodel our services in line with their new commissioning strategies
- Secure OPAL's future during a period of constraints on existing funding streams
- Appoint a Communications Officer and expand the awareness of OPAL and its services
- Build the number of trained and active Volunteers to its pre-pandemic levels
- Ask the Members what services they would need and like, and plan accordingly
- Produce a new 3-Year Plan



## Our OPAL year: April 2021 – March 2022

April 2021

- Outdoor face to face meetings with members took place.
- A volunteer survey showed significant number of volunteers wishing to step down or step back from pre-pandemic volunteer roles.
- COVID risk assessments for all OPAL services were undertaken to support re-opening.

May 2021

- Work with venues prior to reopening services in a 'COVID Safe' way and planning for smaller shorter face to face sessions.
- Volunteer led Zoom sessions take off successfully as another way of keeping in touch! They included coffee mornings, knitting, crafts and reading groups.

June 2021

- Outdoor face to face services commenced; included shorter and smaller gatherings, garden visits and social strolls.
- Volunteers' Week 1-7 June with newsletter and 'thank you' video.
- Carers Week 8-14 June featured outdoor information events in Tiverton, Ellesmere Port and Winsford.
- OPAL in Touch launched for those with no technology experience.
- Our Trustee and OPAL Secretary, Philip Hearfield, retired from his role.
- New Trustees to OPAL Board: Kevin Bradburne and Lesley Gough.

July 2021

- Small groups began to meet indoors from 19 July.
- OPAL lottery launched.
- Updated guidance was implemented as face to face services re-opened and national restrictions were relaxed.
- Joy Walker and Maria Hudson join OPAL staff as organisers of the Carers Services.

Aug 2021

- Further re-opening of face to face services.
- Funding committee reported successful bids for funding from MCBF, Marjorie Boddy Trust and the West Cheshire CCG.
- Our first fundraising event since 'COVID' took place at Frodsham Festival with £260 raised.
- The Masons cheque for our GoOnline service was presented.

Sept 2021

- Some of our face to face services introduced longer sessions with a light lunch provided for members.
- Volunteer recruitment drive commenced across social media and with local advertising.
- Discussions commence with Cheshire West and Chester Council regarding commissioning intentions for OPAL Clubs and Carers services.
- Trustee, Lesley Gough, took over role of OPAL Secretary.



Oct 2021

- GoOnLine sessions begin in Ashton Hayes and Tiverton.
- A fundraiser 'Soup lunch' held in Kelsall raised £500 for OPAL.
- OPAL Trustee representatives joined the Cheshire Rural and Frodsham, Helsby & Elton Community Care Steering Groups.

Nov 2021

- Numbers attending weekly OPAL clubs continued to steadily increase, telephone befriending requests reduced as people move back to face to face groups.
- The OPAL annual report was published on the theme of 'Adjusting, Adapting and Supporting'.
- OPAL AGM held virtually and included presentations by Rev'd Andrew Emison and Kevin Bradburne as well as our Chair, Jane, reflecting on their work and how it changed during the COVID pandemic.

Dec 2021

- A successful event for Carers Services was held in Cuddington/ Sandiway in partnership with the Carers Trust.
- Recruitment of volunteers made positive progress.
- OPAL stall at Ho Ho Helsby fundraiser raised approx £500.
- Following a donation from the Masons, OPAL showcased GoOLine and In Touch services at their celebration event.
- We said goodbye to Sam Moggan, Tarporley Club Organiser and Communications Officer, who left us to pursue new ventures.

Jan 2022

- OPAL face to face services suspended as COVID cases rise significantly. Telephone befriending service, OPAL Reach and activity packs were used to maintain contact.
- Joanne Patel was appointed as our Tarporley Club Organiser and also supporting the Carers Services.

Feb 2022

- Services re-opened again continuing with 'COVID safe' measures in place.
- Clubs returned to full day meetings and providing a hot lunch where possible.
- The recruitment of new volunteers continued to progress steadily.
- A grief loss and bereavement training session was provided for staff and volunteers.

March 2022

- Funding for the telephone befriending service drew to a close.
- John Webb retired from the Board of Trustees having been an OPAL Trustee since 2011.
- A 'soup lunch' fundraiser held in Frodsham raised £510 for OPAL.
- Juliet Compston and Geoff Hope-Terry joined the Board of Trustees (with Geoff being our Chair Designate, to take over from Jane in due course).
- Linda Briody joined the staff supporting the expansion of the 'Branching Out' Service.



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## OPAL Club and Community services 2021/22

The work involved in deciding at what pace and how to reopen our services was huge over this period as we had a duty of care to all parties, members, volunteers and staff. Decisions were made and then had to be continually reconsidered in the light of events. For staff it was very tough as they were trying to reopen safely but were encountering people who were frightened and nervous about being out of their homes and with other people and at the same time they were meeting people who felt frustrated that it was taking so long to get back to “normal”.

Our remote services established during the pandemic were continued over this period and were a lifeline for many who were very nervous about leaving their homes. Some of the services we provided we have learnt much from and will we are sure be incorporating what was best about them into future service planning.

Well done to all our staff and our volunteers for having steered their way through this so that by early 2022 services were indeed running again albeit often with low numbers and often disrupted by sickness. Thank you also to our commissioners and funders who supported us through these times ensuring we had the right level of resources to do so.

Throughout all of this uncertainty there has also been a concern for the future of our services as we moved towards the time when the Council recommission their Early Intervention and Prevention services and their Carer Support services. For us this involves our OPAL Clubs and our carer services, both of which underpin the rest of the organisation and its services.

So all in all a tough year as it will have been for many organisations. We survived however and remain in fair shape so that we can face the challenges ahead.

'I can really recommend OPAL to everyone. It's great for us older folk who need company and who get so much from a day out, with lunch and the chance to meet other people. It means you don't feel so alone.'

'We look forward to the carer trips out and the get togethers... they mean a lot to us all.'

'When I come to What's Cooking I always learn something new, however small.'





'The chair exercises are great as we are able to sing along to our favourites and exercise our limbs.'



'My Mum always looked forward to Club day. It was the highlight of her week and she loved to tell us all that had happened there.'



'We have some very good cooks who supply us with a lovely first course followed by a delicious pudding.'



'We often get involved with crafts, quizzes, dominoes and lots of other games.'





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## Our volunteers

Over the last year our volunteering roles have extended and changed. As always, our team of volunteers have all been amazing in the way they have adapted and responded flexibly. This has been appreciated by those we support, their families and by the OPAL staff!

As COVID restrictions began to ease we have welcomed 41 new volunteers into our OPAL community in the period between April 2021 and April 2022. We have primarily used Facebook and the CWVA volunteer portal to advertise for new volunteers as well as placing posters in local cafés etc. As was the case with many charities, we suffered a loss of volunteers post COVID but have been very successful in filling these roles with new talented people who have quickly integrated into the OPAL team.

In June 2021, we celebrated Volunteers' Week with a 'Happy Volunteers' Week' video which we filmed and produced featuring all our Trustees and staff. This was sent out to all volunteers to thank them for all their hard work and support over the previous 12 months. Volunteers also received a certificate of thanks from our Chair Jane, and Janet, our Volunteer Coordinator.

Volunteers have continued to support us through new fundraising initiatives. Two well attended Soup Lunches were expertly organised by our small team of volunteers who prepared and served guests and raised over £1000 for OPAL in the process. Volunteers also promoted OPAL on stalls through the various annual village events.

Our amazing volunteer led knitting group have produced fantastic items to celebrate various events throughout the year. These have been presented to all members and also sold to help fundraise for OPAL.

Throughout the year, we have provided training for our volunteers including a well-attended Supporting Loss, Grief and Bereavement course in December and various safeguarding sessions.

Looking forward, we continue to expand our team of volunteers to ensure that all our services are well supported and can run effectively.

We are always seeking new volunteers for the various volunteer roles we have available. If you are interested, please contact our Volunteer Coordinator Janet Handley on 07592 464856 [janet.handley@opalservices.org.uk](mailto:janet.handley@opalservices.org.uk)

*'Volunteering is a win-win for everybody concerned, that's what makes it so special. Wonderful people from within your own community are given the support they really need and the volunteer? You get to know you have done something really worthwhile and made a difference to somebody's day!'*

Lynda, Tarporley OPAL



## Our partners

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 who have helped us re-open services safely

The providers of training events for staff and volunteers

Those who have led OPAL so many activities & provided entertainment at our clubs and groups

Social precibers who have signposted and referred people to OPAL services

Farralls - printers of OPAL Reach

The Library Services for publicising services as well as hosting Branching Out

Kelsall Wellbeing Hub for signposting and opportunities for joint working

The Malpas Minibus Committee for their help with transport

Frodsham Bee Friends for signposting and opportunities for joint working

### ...and our wider network partners and funders

Funders and Commissioners (highlighted elsewhere) who have advised and supported during the last year

Healthwatch for their advocacy role and provision of information and training opportunities

CWVA who support volunteer recruitment, provide advice and co-ordinate sector leadership

Local Parish Councils for support in disseminating information and signposting

Community Care Steering Groups providing opportunities for networking and joined up local working



## Funding and fundraising in 2021/22





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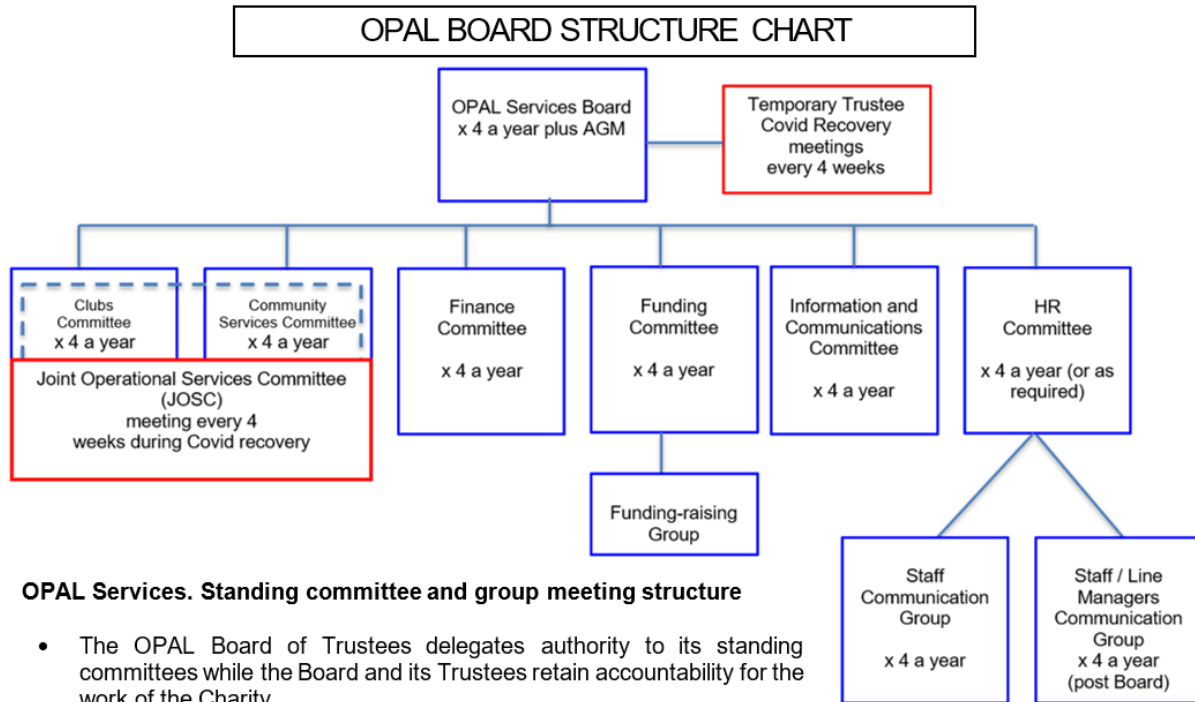
## Funding and fundraising in 2021/22



### And...

We are extremely grateful to those individuals, groups and organisations who made donations to OPAL, during 2021-22 totalling **£6430**.

## Our structure



### OPAL Services. Standing committee and group meeting structure

- The OPAL Board of Trustees delegates authority to its standing committees while the Board and its Trustees retain accountability for the work of the Charity.
- Task and finish groups operate when required and report to the Board or if more appropriate, via a committee of the Board.

## Our team



**Trustees:** Ian Bailey, Jan Bailey, Kevin Bradburne (from June 21), Gill Clough, Jane Colville, Juliet Compston (from March 22), Lesley Gough (from June 21), Philip Hearfield (to June 21), Geoffrey Hope-Terry (from March 22), Brian Mackie, Gill Swash, John Webb (to March 22), Rhiannon Wilson

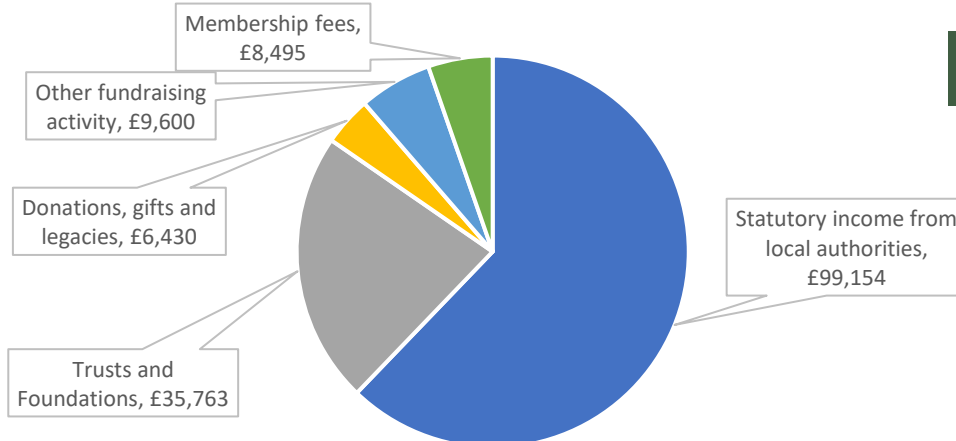
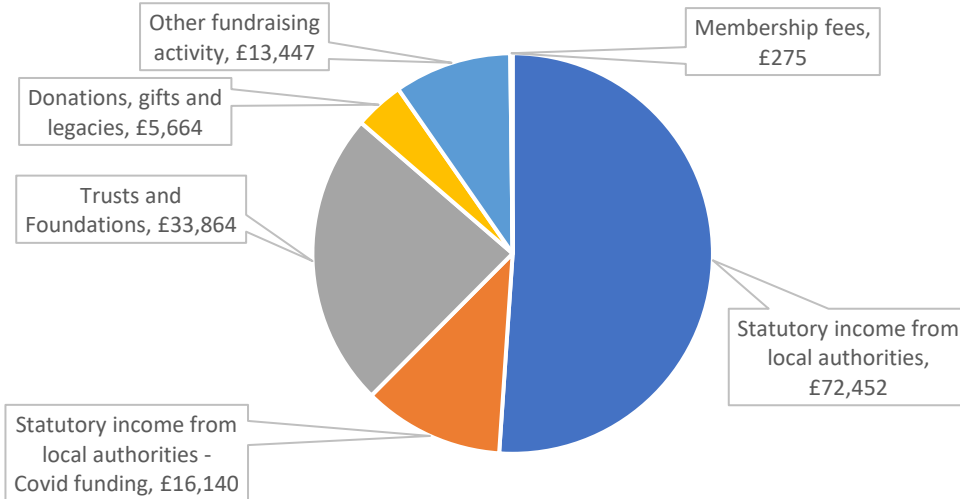
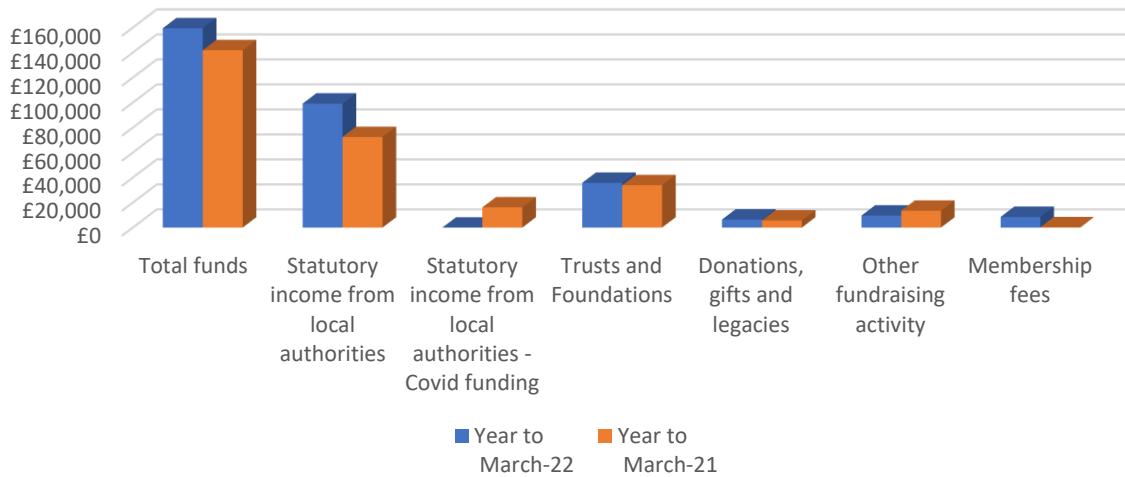


**Staff:** Brenda Platt, Zoe Blocksidge, Jean Toyn, Julie Ennis, Morag Hutson, Samantha Moggan (to Dec 21), Janet Handley, Joy Walker (from Aug 21), Maria Hudson (from Sept 21), Joanne Patel (from Jan 22), Lynda Briody (from Feb 22)



## OPAL money matters

Year on year funds





	Year to March-22	Year to March-21	Movement
<b>Total funding</b>	<b>159,442</b>	<b>141,842</b>	<b>17,600</b>
Staff costs	103,520	97,712	5,808
Volunteer costs	1,134	871	263
Activities	17,020	14,974	2,046
Admin	18,593	18,580	13
Fundraising	86	122	(36)
<b>Total expenditure</b>	<b>140,353</b>	<b>132,259</b>	<b>8,094</b>
<b>Net surplus/ (deficit)</b>	<b>19,089</b>	<b>9,583</b>	<b>9,506</b>
<b>Reserve funds</b>	<b>233,372</b>	<b>214,283</b>	<b>19,089</b>

## Key points

- CWaC Local authority funding increased by £10,600 to £99,100, mainly due to receipt of an additional one-off £30,000 Befriending funding grant which more than compensated for the loss of one-off £16,100 Covid Funding received in the previous year.
- Trust and Charity Foundation funding increased by £1,900 to £35,800, 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 £6,400 were received in the year, which was an increase of £700 over the £5,700 received in the previous year.
- Other fundraising activity reduced by £3,800 to £9,600, as a consequence of the impact of COVID-19 restrictions.
- Club membership fees recovered to £8,500 as Club activity started up again, albeit at a much reduced attendance due to the Covid impact.
- Total funding increased by £17,600 to £159,400.





## Our Financial Statements

At March 31<sup>st</sup> 2022 there were eleven trustees on the OPAL Board of Trustees who are also Directors of the Company for the purposes of Company Law.

Mr Philip Hearfield retired as a Trustee and OPAL Secretary in June 2021 and Mr John Webb retired as a Trustee in March 2022. Four new Trustees have been appointed during the year: Mr Kevin Bradburne, Mrs Lesley Gough, Mrs Juliet Compston and Mr Geoff Hope-Terry.

The procedure for the appointment of trustees is set out in the Articles of Association. There must be at least five trustees, but no maximum is set.

### Responsibilities of Trustees

The trustees are responsible for preparing the Annual Report and the Financial Statements in accordance with the applicable law and regulations. Company law requires the trustees to prepare financial statements in accordance with UK Generally Accepted Accounting Practice (UK Accounting Standards and applicable law). The financial statements are required by law to give a true and fair view of the state of affairs at the charity and of the surplus/deficit of the charity for that period.

In preparing these financial statements, the trustees are required to:

- Select suitable accounting policies and then apply them consistently
- Make judgements and estimates that are reasonable and prudent.
- Prepared the financial statements on the on-going concern basis unless it is inappropriate
- to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the Companies Act 2006.

The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

So far as the trustees are aware:

There is no relevant information of which the charity's independent Examiner is unaware and the trustees have taken all steps that they ought to have taken to make themselves aware of any relevant information and to establish that the independent examiner is aware of that information.

### Declaration

The trustees declare that there were no Serious Incidents, as defined by the Charity Commission, or any other matters which should have been brought to the attention of the Charity Commission.

### Small Company Provisions

This report has been prepared in accordance with the provisions of Part 15 of the Companies Act 2006 relating to small companies.



## Independent Examiner

Rebecca Ellams has been re-appointed as independent examiner.

This Trustees Annual Report was approved by the Board of Trustees on 14<sup>th</sup> September 2022.

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](mailto:morag.hutson@opalservices.org.uk)

Draft Financial Statements at 17 October 2022 at 15:33:53  
**OPAL SERVICES (RURAL WEST CHESHIRE)**

**BALANCE SHEET**  
**AS AT 31 MARCH 2022**

	Notes	2022 £	£	2021 £	£
<b>Fixed assets</b>					
Tangible assets	11		3,975		1,887
<b>Current assets</b>					
Debtors	12	3,768		766	
Cash at bank and in hand		257,058		234,931	
		260,826		235,697	
<b>Creditors: amounts falling due within one year</b>	13	(31,428)		(23,301)	
Net current assets			229,398		212,396
<b>Total assets less current liabilities</b>			233,373		214,283
<b>Income funds</b>					
Restricted funds	14		62,113		51,549
<u>Unrestricted funds</u>					
Designated funds	15	45,068		45,126	
General unrestricted funds		126,192		117,608	
			171,260		162,734
			233,373		214,283

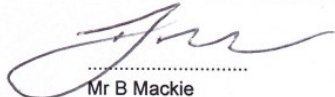
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2022.

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 9<sup>th</sup> November 2022

  
.....  
Mr B Mackie  
Trustee

# OPAL SERVICES (RURAL WEST CHESHIRE)

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF OPAL SERVICES (RURAL WEST CHESHIRE)

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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 2022.

#### 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  
Tarporley  
Cheshire  
CW6 0AT

Dated: 20/10/22

## Company information

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

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

### Board of Trustee Directors 2021-22

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
Mrs Juliet Compston	From March 2022
Mrs Lesley Gough	From June 2021, Secretary from September 2021
Mr Philip Hearfield	From June 2019, Secretary from October 2019 to June 2021
Mr Geoff Hope-Terry	From March 2022, Chair elect
Mr Brian Mackie	CA From March 2020, Treasurer from March 2020
Mrs Gill Swash	From July 2017
P Cllr Mr John Webb	From October 2011 to March 2022
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