

ANNUAL REPORT

2019 - 2020

40th Anniversary Edition

St Albans Good Neighbour Scheme

Charity No: 1074638

Company No: 03675149

Registered Office: 47 Woodland Drive, St Albans, England, AL4 0EL



ST ALBANS GOOD NEIGHBOUR SCHEME

Welcome from the Chair *Jane Burstow*

When taking over the role of Chairman in October 2019, I knew that I had a busy year ahead, but little did I know what I had let myself in for!

At my first committee meeting in November 2019 I listed my aims for the year as follows:

- To establish sub-committees to undertake the operational work
- To complete Disclosure and Barring Service (DBS) checks on all volunteers
- To manage recruitment of committee post holders
- To send out regular newsletter to volunteers
- To complete volunteers' safeguarding training
- To computerise the Duty Officer system
- To update the Scheme website
- To implement General Data Protection Regulation (GDPR) requirements in full
- To finish committee meetings by 10pm!

We were just getting stuck in and making great progress and then came the Covid-19 pandemic...

Our Annual Report includes:

- Volunteer Updates
- Section Leader Reports
- Going Digital and Other Initiatives
- Finances

Clues to our exciting re-branding and new website are contained throughout this report. Launch is planned for early 2021!
Until then, please continue to refer to our existing website

www.sagns.org

Chairman's Report *Jane Burstow*

At least a month before the national lockdown in late March, we resolved to continue supporting our local community as safely and effectively as we could, providing guidance to volunteers and fielding enquiries relating to the possible impact of the virus. During the months that followed, we regularly monitored and reviewed our operational approach to ensure compliance with ever changing advice, guidelines and legal requirements.

Progress to date

- Sub-committees established for computerisation, recruitment, GDPR, rebranding and website
- DBS checking procedure finalised and implemented
- Recruitment of committee members and post holders
- Regular newsletters issued keeping volunteers up to date with operational guidance on Covid 19 safety and other news
- Safeguarding training delivered to transport volunteers and through an online training presentation for all volunteers
- Steady progress in computerisation of the DO system despite the constraints of the pandemic, including Covid-safe-training, both in person and remotely
- The new website will be launched, along with a new logo and associated rebranding in early 2021
- Writing documentation and policies to ensure GDPR compliance and improving the security of personal data
- Most of the committee meetings have ended before 10pm!

Postholder comings and goings

During the year we have said farewell and thank you to **Jane Cloke, Karen Fryer** and **Helen Whitehouse**, as committee members, but they continue to be volunteers. We welcomed **Dana Cox, Serena Dicks** and **Nicky Stephens** to fill their vacancies. We also welcomed **Andre Bottin, Sue McElroy** and **Catherine Brighton**.

Zoom!

Last October I had never heard of Zoom, except for in a song I sing to my grandchildren! In March we all became aware of this invaluable virtual meeting facility and now I am Zooming up to six times a week with fellow committee members, Duty Officers, etc.

Thank You

Everyone connected with St Albans Good Neighbour Scheme should be proud of what has collectively been achieved in the year to September 2020, a real testament to great teamwork. Whether it was popping out to the shops to get essential supplies for a shielding client, or a trip to the hospital for an important blood test, or an essential "spring clean" of an unhygienic fridge, or a reassuring phone call to a distressed client, or the undertaking of an additional stint on the phone line, or working behind the scenes, I thank you all for everything you have done. You should be justifiably proud of being part of this amazing organisation. I'm sorry we can't celebrate reaching our 40th anniversary, but hope we can next year!

Volunteer Coordinator's Report *Nicky Stephens*

During the past year, our volunteer numbers have remained stable. In normal circumstances we would work to recruit volunteers to counter natural attrition. With additional pressures on us from the pandemic, we were pleased to be able to maintain our volunteer base which is particularly good given that for 6 months we have been unable to interview and therefore recruit volunteers.

We have started a review of the recruitment and joining process and this will be a key focus for the coming year. We will also be speaking to as many of our current volunteers as possible over the coming weeks to understand their circumstances in the current climate. In the longer term, we are also aiming to achieve the coveted Hertfordshire Valuing Volunteer Management 6-Point Promise.

Special Recognition for *Helen Whitehouse, Ted & Stella Winter*



Helen received a special Mayor's Recognition Award in April. She accepted it "on behalf of all the volunteers of the wonderful charity to which we all belong."



Ted & Stella marked 40 years' service as our first ever duty officers.

Facts and Figures *Dana Cox & Trevor Fake*



Know someone who might want to **join us?** Please direct them to our website

www.sagns.org

Duty Officer Report *Serena Dicks*

The lockdown month of March was most certainly an eventful time for SAGNS, our community, and for myself with taking on the role of Duty Officer Section Leader. It was a time for our community charity to remain on point amid the global pandemic madness. A challenging call for all volunteers to support those who needed it.

SAGNS embodies a collective force for good and I witnessed that first hand. During lockdown, support in the community for the vulnerable, elderly and lonely was paramount to getting through the uncertainty and adapting to a new way of life. 'Accept and adjust' became a key mantra. Globally!

The role of the Duty Officer (DO) is above all a friendly exchange with our clients. A daily dose during lockdown being a sanity check for our minds and our health. I heard over and over again the following tributes and expressions of gratefulness to SAGNS:

"I don't know what I'd do without your help!"; "I am finding it hard to cope and am so grateful for your transport to urgent hospital appointments"; and repeated often, "So pleased you are here for us and to know that you care and can help in times of need." Doorstep exchanges, within government guidelines, were happily organised regarding collecting of medications and delivery of essentials. A longstanding client exclaimed to DOs, "just to have someone to talk to and listen to me, it is just truly wonderful!"

People expressed gratitude around every corner. Liaising with DOs myself, I found they too felt compassion and kindness towards the callers. It did seem as though the whole city carried on; albeit at a snail's pace. The collective camaraderie was palpable.

The number of calls to SAGNS Duty Officers did diminish, especially during the March to May period. In March we had a total number of 97 calls which reduced to 17 in April, 8 in May, then rose to 28 in June. For the month of September we received 46 calls. Once we all saw a bit of sunshine, and perhaps felt renewed hope, the numbers rose.

Duty Officers on sabbatical (those volunteers shielding and/or isolating themselves), slowly returned/are returning to the fore. A continual change in government guidelines regarding the pandemic has kept volunteers, the SAGNS committee and clients on their toes. It has indeed been perplexing and exhausting at times for all, but a positive spirit has prevailed. We remain currently with fewer active volunteers but we fundamentally know things will eventually evolve to the new normal and SAGNS will grow and continue in supporting our dynamic and treasured community.



Transport Report *Trevor Fake*

During the past year our wonderful volunteers have made in excess of 1,000 trips compared to 1,500 in the previous year. The main reason for this drop in numbers is due of course to the pandemic and the resultant lockdown. Details can be seen in the table below:

Type	Oct - March	April - Sept	YE Sep 2020	YE Sep 2019
Hospitals	439	154	593	1,021
Medical	207	66	273	298
Social	120	84	204	185
Total	766	304	1,070	1,504

In March when Coronavirus struck, our first concern was for our volunteers and clients. We instructed our "high risk" volunteers and those over 70, to take a sabbatical, reducing our available driver numbers from 80 to 20. At the same time hospitals and doctors' surgeries stopped having face-to-face consultations, migrating to telephone consultations. The increase in social journeys is attributable to shopping trips which nearly doubled from 64 last year to 122 this year.

Hospitals account for the majority of transport trips. The top five hospitals: St Albans City Hospital (189), Watford General Hospital (180), Hemel Hempstead General Hospital (102), Lister (24) and Stanmore (16), account for 86% of all hospital visits.

The pressure on the reduced number of available drivers has been significant, and I am very proud of our volunteers who, despite the pandemic, have continued to provide our clients with help during these very strange times. My thanks to all our drivers and Duty Officers who have helped to keep the Scheme operating 7 days per week and 365 days per year.



Shopping Report *John Dixon*

What a year! At the last AGM there was not an inkling that there were any drastic changes in our various areas of charitable support. Queuing half way around the supermarket wearing strange masks, sanitizing our hands as we entered and left, allowed in preferably one by one, keeping our distance from our fellow shoppers became our norm. Had we wandered into a science-fiction movie by mistake? For most of our Regular Shopping clients, being taken shopping was an escape and an attempt to stay independent at least to a small extent. Now shopping was suddenly dangerous, only for the brave and/or the relatively young.

As we entered March it was necessary to talk with our clients to see how they would handle the situation. Most of them were fortunate enough to have family, friends or neighbours willing to come forward to shield them from these dangers, at least while the pandemic was playing havoc. They have continued to stay hidden away through summer and even now, as we enter into what feels like a bleak winter.

Not knowing what was ahead and what the demand would be, we asked for temporary shoppers to help through this crisis. A goodly number did, helped by the fact that working from home was the new norm. It helped balance up the volunteers aged over 70, who we asked to stand down in line with Government advice. Most of the temporary shoppers have stayed. None of us knew how temporary temporary was.

Some new clients, asking for emergency help, have been adopted by volunteers, and are now being included amongst the Regular Shopping clients, as coordinated by me.

At present we have 15 clients being shopped for on a regular basis. Clearly at the present time there are a number of others, who are being shopped for on an occasional or temporary basis. That may change considerably when we get the all clear from the Government, which is unlikely to happen before late spring or early summer 2021.

As for the future, who would dare to guess, unless writing science fiction novels was one of your fortes? I suspect that a lot of those independent shoppers will not return to us. Shopping itself is changing rapidly in the wider community. Click and collect might become de rigueur for all ages. Nearly all retirees will now be computer proficient, of necessity. Why risk germs and a dangerous hospital stay, when it can all be brought to you? Delivery very early or very late can be cheap, or even free, though it might not make you popular with your neighbours.



Befriending Report *Sarah McAlister*

I am absolutely delighted that our Befriending Section has continued to thrive despite the restrictions imposed by the pandemic - thanks entirely to the dedication of our 35 Befrienders. The Scheme's year started with a wonderful turnout of Befrienders at our AGM, when we had the opportunity during the informal part of the event to share our befriending experiences with each other. I heard that one of our young volunteers, aged 19, has been learning a lot about classical music and linguistics from his 96-year old client friend, who, in return, has been gaining a fascinating insight into psychedelic funk and pet chickens! I also heard that a widow in her 80's who lives alone was particularly enjoying her weekly visit from Millie, despite Millie's tendency to remain very quiet during conversations and occasionally jump on the furniture! Millie is her Befriender's border collie and is bringing warmth and joy into her life.

Whilst the pandemic prevented face to face visits for several months, and for some of our pairings it continues to do so, we kept our friendships going with regular phone calls. We all need human contact more than ever during these exceptionally difficult times, and the kindness shown by so many of our Befrienders has been overwhelming. They've been dropping off surprise treats to cheer their client friends up; they've been driving to respite homes out of the area to make Covid-safe visits; they've been giving regular moral support during challenging cancer treatment. And most importantly, they've all been providing reliable, reassuring, friendly conversation, whether it's by phone or in person.

In response to the pandemic, we very quickly set up a dedicated Telephone Befriending service for new clients in need of regular calls and we organised a Same Day Call Back service for anxious callers who just needed someone to talk to straight away. By the end of the summer, demand for these services had declined, which I suppose is a reassuring sign that our community is adapting to the new normal, so this service has been withdrawn.

I think a lot of us are missing our regular Befriender and Client Coffee Mornings at Burstons Garden Centre and I sincerely hope that they will return during 2021. In the meantime, we continue our risk-assessed Covid-safe befriending for our long-standing pairings, either on the phone or in person, as enthusiastically as ever.



Practical Help Report *Tessa Pyke*

Unsurprisingly the number of jobs undertaken over the last year has been far fewer than we might usually have expected, 64 in all.

After the COVID restrictions came into effect on 23rd March, we stopped accepting practical help referrals unless we deemed them a matter of health and safety. 5 referrals were accepted under the Health and Safety heading:

- 2 heavy mirrored wardrobe doors had come off their track.
- A dead bird was seen in a client's porch and reported to her by Meals on Wheels when they delivered her lunch. When our volunteer arrived to remove it, they discovered that the Meals on Wheels van had returned at the end of its run to dispose of it themselves!
- An elderly client's bathroom light bulb needed replacing and she was nervous about using the bathroom in the night.
- A client's reclining chair was reported to be stuck in the recline position. It was discovered that the power cable for the chair was in another room! Once plugged in all was OK!
- A client's loo was not flushing properly. Our volunteer went to see if he could help but it was not something he could do, so the client had to call a plumber.

As the COVID situation improved we opened up the Practical Help section again at the beginning of September but for outdoor jobs only where there is no necessity to enter the client's home.

Overall, the jobs requested have been as varied as ever, ranging from posting a parcel to repairing a shed roof and from requesting the complete removal of a hedge (refused!) to unpacking a new Hoover and taking it upstairs. There has been a slight increase in the number of multi-job requests which is understandable when you think of all the small jobs that need attention in our homes every day but pile up for those unable to do the jobs themselves. The last one was to mow a small lawn and repair a garden seat but in addition the wonderful Mark stopped a tap dripping, repaired an oven drawer and two more kitchen drawers that wouldn't close – all for the very grateful 92-year old client!

This year has certainly been a challenge for all so I would like to say a special thank you to those volunteers who have been willing and able to help our clients during this difficult time.

I would also like to mention one of our volunteers, Clem Webb, who sadly passed away in May. He particularly enjoyed gardening and was a regular member of a group who for several years looked after the Runcie Garden at St Albans City Hospital. He was a real "gentleman" in the good old fashioned sense and I shall miss him.



IN OTHER NEWS...

Going Digital *Andre Bottin*

At the age of 40 years, St Albans Good Neighbour Scheme is joining the computer age with a vengeance. Yes, it is now well on its way to using cloud-based online services and gradually becoming paperless. Digitising historic records is taking place and we are making strides towards operating a paperless virtual office based on the cloud.

The decision to use OPTiMiSe was made a year ago. Designed specifically for community transport and other community service organisations, OPTiMiSe is the easiest, simplest and most user-friendly booking software on the market.

Most Duty Officers have now been trained how to use OPTiMiSe and all of them will have been trained by the end of November. During the last 12 months two laptops were purchased and especially configured for the Duty Officers, providing a safe and tailored tool for volunteers. The OPTiMiSe booking software is a pretty good match for the Scheme's requirements; however it does not do everything we need, so we are developing an ever-growing range of new online, cloud-based services, which will enable all involved to protect sensitive volunteer and client information.



Branding, Social Media & Website *Sue McElroy*

What started out as a desire to update the website and set up a Facebook page rapidly grew in scope! Websites increasingly depend on the traffic driven to them by social media, requiring a consistent approach to branding across all material and mediums.

We set out to understand how we were presented currently and where we wanted to get to. This required asking ourselves some thought-provoking questions;

- *Who are we?*
- *What are our values?*
- *How does this relate to the current visuals we use?*
- *How can we set ourselves up for the future?*

We set out to refresh the branding and flow this through all our communications, including developing a new website.

We were going to need some help!

Help arrived in response to a 'call to action' post issued on our current Facebook page. **Tom Anderson**, an independent graphic designer came to our aid. Following 6 months of intense activity, we are now in the process of finalising the new branding and developing the new website for release early 2021. Watch this space!



The Facebook post, shared 9 times, reached **3,412** people!

Treasurer's Report *Trevor Fake*

Income

Income during the year ending 30 September 2020 amounted to £15,055 which includes a grant from HCF in the sum of £2,000 plus legacies of £5,288 from clients, therefore donations were down to £7,767.



Expenditure

Expenditure during the year ending 30 September 2020 amounted to £9,173.

Surplus / Deficit

The surplus during the year ending 30 September 2020 amounted to £5,882. It should be borne in mind that this year's surplus includes exceptional items of £2,000 grant and £5,288 legacy as mentioned above.

Notes

This year there has been an increase in expenditure in respect of meetings; this is due to implementing safeguarding and Optimise training. The Covid-19 response has also required additional operational meetings.

Grant

We were awarded a grant to help with additional expenses incurred as a result of the coronavirus pandemic; this amounted to £2,000 and so far we have incurred £613 of additional expenses. The grant has been extended to March 2021, but at that time anything unspent must be returned to HCF. At this stage the balance repayable amounts to £1,387.

Summary

30/09/19	% Expenses	Detail	30/09/20	% Expenses
£12,739	115%	Income	£15,055	164%
£11,113	100%	Expenditure	£9,173	100%
£1,626	15%	Surplus	£5,882	64%
£31,483		Bank Balance	£37,365	

St Albans Good Neighbour Scheme

Registered Charity No. 1074638

[A Company (No. 3675149) limited by guarantee and not having a share capital]

Income & Expenditure Account for the year ended 30 September 2020

2018 / 2019	<u>Income</u>	2019 / 2020
£0	HCF Grant <i>Note 1</i>	£2,000
£0	Legacy	£5,288
£12,739	Donations	£7,767
<u>£12,739</u>		<u>£15,055</u>
	<u>Expenditure</u>	
£7,448	Mileage	£4,692
£296	Phone	£270
£545	Insurance	£521
£373	Stationery	£158
£320	Stamps	£176
£175	Meetings	£321
£449	IT	£1,767
£720	DBS	£264
£226	Gifts / Cards	£151
£145	Training	£161
£48	Subs	£65
£368	Sundries	£14
£0	HCF Claim <i>Note 1</i>	£613
<u>£11,113</u>		<u>£9,173</u>
<u>£1,626</u>	<u>Surplus for the year</u>	<u>£5,882</u>

<u>Balance Sheet as at 30 September 2020</u>		
£29,856	Balance b/f	£31,483
£1,626	Surplus / (Deficit)	£5,882
<u>£31,483</u>		<u>£37,365</u>
<u>£31,483</u>	Cash at Bank <i>Nat West Current</i>	<u>£37,365</u>

Note 1

HCF

Restricted Grant A551189

On 24 April 2020 we received a restricted grant from Hertfordshire Community Foundation (HCF) in respect of additional costs incurred as a result of Covid. In the year we have spent £613. The balance of the grant is available for such cost in future, and any monies not spent are due for repayment to HCF on 31 March 2021

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES
OF THE ST ALBANS GOOD NEIGHBOUR SCHEME ("THE SCHEME")**

Charity number 1074638

I report to the trustees on my examination of the accounts of the Scheme for the year ended 30th September 2020, which are attached.

Responsibilities and basis of report

As the charity trustees of The Scheme, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

You consider that an audit is not required for this year under section 144 of the Act and that an independent examination is needed.

I report in respect of my examination of The Scheme's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Basis of independent examiner's statement

My examination includes a review of the accounting records kept by the Scheme and a comparison of the accounts presented with the records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a "true and fair view" and the report is limited to those matters set out in the statement below.

Independent examiner's statement

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

- accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts do not accord with the accounting records.

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



Peter Owen Harrison FCA

Fellow of the Institute of Chartered Accountants in England and Wales.

9 Marshal's Drive, St Albans, Hertfordshire, AL1 4RB.

31 October 2020

ST ALBANS GOOD NEIGHBOUR SCHEME

Charity No. 1074638

Company No. 3675149

Reserves Policy

(reviewed annually)

1. The Charity Commission for England and Wales define reserves as:

- 1.1.1 Income which becomes available to the charity and is to be expended at the trustees' discretion in furtherance of any of the charity's objects (sometime referred to as "general purpose" income), but which
- 1.1.2 Is not yet spent, committed or designated (i.e. is "free").
Therefore the term "reserves" describes that part of the charity's funds that is freely available to spend for any or all of the charity's purposes, once it has met its commitments and covered its other planned expenditure.
- 1.2 The commission excludes the following funds within the definition of reserves:
 - 1.2.1 Permanent endowment
 - 1.2.2 Expendable endowment
 - 1.2.3 Designated
 - 1.2.4 Tangible fixed assets, held for charity use.

These funds by nature are restricted and not available as reserves.

Interpreting these definitions and applying them to Scheme funds currently held, and also to be held, we believe that none of the above exclusions are applicable to the Scheme. Consequently, the Directors have produced the following policy.

2. Reserves Policy.

- 2.1 The Scheme does not own property.
- 2.2 The Scheme does own equipment necessary to carry out the objects of the Scheme. These items are written off at purchase and therefore considered as zero assets.
- 2.3 Funds are invested in suitable 'charity accounts' (when beneficial) that the Directors consider present only minimal risk. Interest rates are reviewed on a regular basis against those being offered by similar providers to ensure the Scheme benefits from any competitive movement in interest rates.

The Scheme's policy does not maintain reserves in a form that is dependent upon annual expenditure (as do many larger charities). However, the Directors do take a prudent view to maintain reserves at a level considered appropriate to meet any unforeseen expenditure though not restricting availability of funds to meet clear charitable need within the objects of the Scheme. The Directors have deemed the level of reserves should not fall below £7,000.

3. Reserves held for purposes which include:

- 3.1 Office/administration equipment and replacement
- 3.2 Increased volunteer demand for reimbursement of expenses
- 3.3 Replacement/extra requirements for section duties
- 3.4 The premium required for public liability insurance in the absence of sufficient surplus from previous years' activities
- 3.5 Unforeseen expenditure
- 3.6 Unexpected reductions in client donations.

In the event of the Scheme ceasing to function no redundancy payments would be necessary.

Adopted on: 18 May 2020

Next review date: May 2021

Structure, management and governance

The Directors of the Company are also Charity Trustees for the purposes of Charity Law and under the Company's Articles are known as Members of the Management Committee. Under the requirements of the Articles of Association, the members of the Management Committee are elected to serve for three years after which they may be re-elected at the next AGM.

Management Committee (known as Members/Directors/Trustees):

Jane Burstow	Chairman
Beckie Bates	Vice Chairman
Trevor Fake	Treasurer
Jane Cloke	Secretary (until January 2020)
Dana Cox	Secretary (from January 2020)
Karen Fryer	Duty Officer Section Leader (until March 2020)
Serena Dicks	Duty Officer Section Leader (from March 2020)
Trevor Fake	Transport Section Leader
Helen Whitehouse	Membership Secretary & Practical Help Section Leader (until May 2020)
Sarah McAlister	Befriending Section Leader & Safeguarding Lead
John Dixon	Regular Shopping Section Leader
Andre Bottin	IT Adviser (from March 2020)

Officers not on Management Committee:

Practical Help Co-ordinator	Tessa Pyke
Duty Officer Rota Co-ordinator	Anne Horton
Bag Transfer Co-ordinator	Sheila Paterson
Deputy Duty Officer Section Leader	Ali Burroughes
Deputy Transport Section Leader	Colleen Welfare
Deputy Befriending Section Leader	Christina Allan
Distribution Secretary	Meriel Dixon
Helpline Administration	Jacqui Rayment
Volunteer Coordinator	Nicky Stephens (from Sept 2020)
Legal Adviser	Niall McAlister

All members of the Management Committee give their time voluntarily and receive no benefits from the Charity. Any expenses reclaimed are included in the Accounts.

Declaration

The trustees declare that they have approved the Annual Report.

Signed on behalf of the charity's trustees

Signature	<i>Jane Burstow</i>
Name	Jane Burstow
Position	Chairman
Date	21/11/20

