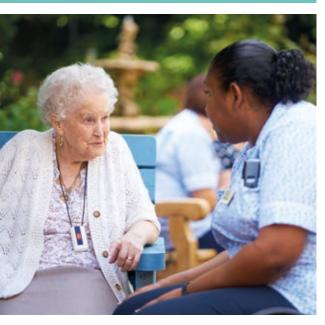


Annual Review







2019 - 20





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Foreword from

John Robinson CBE

Chair. MHA Board of Trustees



I am pleased to introduce Methodist Homes' (MHA) Annual Review for 2019/20.

During the last twelve months, I have had the pleasure of visiting a further 21 of MHA's homes and schemes, meeting many wonderful residents, members, staff and volunteers and seeing first-hand the work we do to support older people to live later life well. It is wonderful work, particularly vital in these difficult times for our country.

The current pandemic has truly exposed the impact of years of steadily reducing state support for older people in housing, care homes and in the community - at the very time that the need is increasing due to our aging population. So it is even more important that we play our part in enabling as many people as we can to live comfortable and fulfilled lives, reducing the risk of loneliness and isolation.

MHA was founded more than 75 years ago by the Methodist Church, fulfilling a Christian duty to care for all people no

matter their faith or background. Today we serve over 19,600 older people across our 90 care homes, 70 retirement living communities and 62 Live at Home schemes, supported by 7,522 staff and 4,250 volunteers. Our founders can be proud of MHA's work today except I am sure they would be saying that we should do more! And there is much more to do.

One area which makes MHA's work differ from others is the level of support we give through our Chaplaincy service. Chaplains are available to residents, families and staff of all faiths and beliefs in all our care homes and retirement living schemes and we have been looking at how we can extend this into our Live at Home services, making sure we truly care for the mind, body and spirit of all the people we support. This has been particularly important during this time of national crisis due to the Covid-19 pandemic.

Crucial also is that we continue on a firm financial footing, so that we can ensure the success of our new five year strategy,



which we launched in April 2019. This has clearly had to be reviewed in light of the immediate focus required to deal with the effects of the current pandemic. Our revised Business Plan for 2020/21 ensures the continuation of the strategy's core themes alongside robust Covid Recovery and financial planning. The Financial Statement included in this Annual Review covers a period that ended just as the pandemic was taking hold and shows we made a net income in 2019/20 of £15m (2019: £9.8m).

Despite this we ended the year with a greatly improved cash position, largely due to the completion of a number of property sales.

The year ahead will certainly be one of challenge as we continue to deliver quality services across all our homes and schemes in the context of Covid-19, but the Board is committed to ensuring that we are in the best place to take the charity forward into its next phase once we can be certain the current pandemic is over.





Introduction from

Sam Monaghan

Chief Executive of MHA



We started 2019/20 with the launch of MHA's new strategy to take us forward for the next five years with certainty about our plans. However, by the end of the financial year the world was looking a very different place, as we started to realise the scale and effect coronavirus was about to have on MHA, its residents, members and staff.

Thankfully our work on becoming more collaborative as One MHA put us in the strongest position to face these Challenges. I've been so proud and humbled by the way the whole of MHA has gone above and beyond to not only care for and protect our residents and members, but also to support each other.

In becoming more integrated across our homes and schemes, we had already started pilots for services to work even more closely together in the Leeds and Mendip areas of the country as part of being MHA in Community. And we were already seeing similar initiatives arise elsewhere. It proved vital groundwork that meant we were better able to respond as an organisation when Covid 19 hit.

MHA in Community is about developing friendly and caring communities, places that are broader than a single service, with strong links to their local areas and where people can maintain and maximise their independence and keep safe.

What has never ceased to amaze me about MHA is the willingness of our people to embrace change and look to the future while at the same time making sure our high standards of care are maintained for all. At the beginning of 2019/20 colleagues from across MHA started working alongside each other in 12 workstreams to bring our strategy to life, reducing to eight reflecting the pace of work being completed, especially with continuous improvement becoming the norm across the charity.

Building on this, in October, we unveiled our new brand to our colleagues at our Managers' Conference, setting out with greater confidence and clarity who we are, what we do and our ambition that in all our homes and schemes, residents and members will be able to live later life well.

Our Mission

As a charity, our mission is to enable people to live later life well.

Our Values

Inspired by our Methodist roots, we: **Respect** every person, treating them with dianity

Nurture mind, body and spirit **Inspire** the best in each other

Our Vision

By 2024, we will have connected our communities, realising our potential as One MHA, to increase the reach, impact and quality of care and support we provide to people in later life.

Crucial within this work is our new Equality, Diversity and Inclusion Strategy to ensure that everyone - resident, member, colleague or volunteer - is able to come to work and feel safe in the knowledge that they can be who they are. We want to have a culture which is inclusive, promotes respect and fairness, and supports equality for all.

Black and LGBT History Months, Mental Health Days and religious festivals are now anchors across the year to foster conversation, celebration and challenge in our homes, schemes and offices to promote a fuller sense of inclusion and over the coming year, six staff network groups, focussing on different aspects of diversity will be established to provide both support and learning for how we can improve inclusion across MHA.

It is this sort of emphasis that ensures we continue to be one of the highest rated providers of care and I was delighted this year when three more of our care homes were judged as 'outstanding' by the Care Quality Commission and our

Strategic **MHA** in Community Objective

Build strong local relationships, connecting our services as MHA in community.

MHA Enhancing Strategic Objective ___ **Later Life**

To be intentional and innovative in our efforts to enhance later life.

MHA Fit for the Strategic 🤦 Objective \bigcirc future

To have efficient and effective processes, creating as MHA fit for the future.

Strategic **MHA People** Objective

To be inclusive and proactive in the development of our people.

Mickle Hill retirement living village became our first housing with care scheme to be formally acknowledged as providing 'outstanding' care. These four additional 'outstandings' mean we now have ten of our homes and schemes judged to be providing 'outstanding' or equivalent care by inspectors, with almost 90% of our homes and schemes now rated Good/ Outstanding.

It is this dedication by our teams across MHA, looking after and supporting our residents and members, which never fails to amaze me and which has helped us to one of the highest quality ratings of all care providers. Each week I hear amazing stories about how our people go above and beyond, so we wanted to devote our Annual Review this year to sharing with you some of the ways in which we seek to enable our residents and members to truly live later life well.



Living well with dementia

Our dementia strategy comes to life

It is not always easy for people with dementia to live later life well. But at MHA, we do everything we can to make sure this can happen.

We launched our new Dementia Strategy in 2019 with six commitments to people living with dementia and their families.

We will support people living with dementia to engage with their local community.



We will ensure that our staff and volunteers have the right attributes, attitudes and knowledge to support people affected by dementia.

3 1

We will work in partnership with families to help them feel supported and involved.

We will ensure that people living with dementia live in or visit an **environment** that makes them feel at home, safe and supported.

We will work to recognise behaviour as a form of communication and take time to respond in a supportive way.

We will assist people living with dementia to access spiritual support, meaningful music and activities.



music therapists covering 65 specialist dementia care homes

Since then we have started to pilot new projects to help people living with dementia and extend these and other services across MHA.

At six care homes and retirement living settings in Merseyside, we have been piloting Book of You, a simple appbased life story tool to aid memory, spark conversations and provide insight into the person impacted by the disease.

Treasured photographs can be uploaded to the app, family members can record messages, links can be put to favourite television programmes and music which sparks memories. Book of You complements the life story taken about every resident when they join MHA, and as well as helping the individual living with dementia, it also helps carers get to know residents better.

Another app being trialled in seven care homes is Active Minds. This helps by providing suggestions for activities for residents to participate in and assists activity coordinators with structured recording that enables them to identify those most at risk of social isolation.

But it is not just about apps to help homes and schemes. A pilot started at MHA to help people living with dementia has been Love to Move. Based on a concept from Japan, this gentle exercise programme has been taught to 30 staff from care homes, retirement living and Live at Home in Leeds and Birmingham by the British Gymnastics Foundation.

Sessions focus on bilateral movement the type which involves patting your head and rubbing your tummy at the same time. This involves encouraging members and residents to use the left side and right side of their brain to process information independently, helping improve cognitive function, coordination and the ability to carry out activities of daily living more independently.

Robotic cats and dogs also continue to be found in more of MHA's care homes. helping provide comfort for people living with dementia, along with interactive tables, now found in 12 specialist dementia care homes.







Moment of Joy, music therapy and the BBC

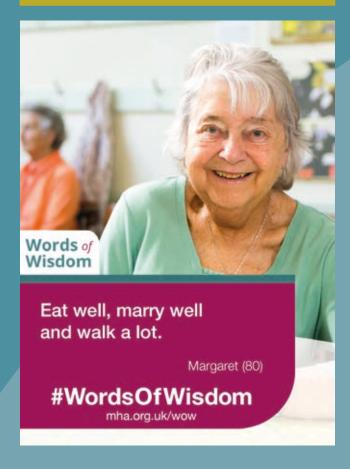
MHA was delighted to take part in the BBC's Music Day, which in 2019 called for music therapy to be available for everyone living with dementia.

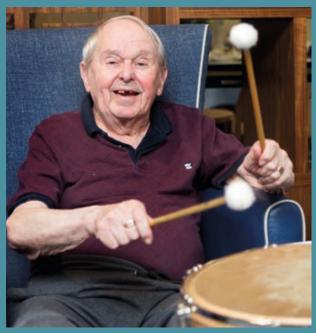
We used the opportunity to not only hold open days in a number of our care homes for invited guests to showcase what music therapy is about, but to launch our Moment of Joy campaign, spearheaded by former Strictly Come Dancing judge and choreographer Arlene Phillips.

Through animation, we tell the story of Sally, a resident living with dementia, and how music therapy helps lift her mood, providing her with her Moment of Joy.

In the campaign, we asked for celebrities to give us their musical Moment of Joy, securing endorsement from people like writer and broadcaster Stephen Fry, TV host and media personality Michelle Visage and children's TV personalities Dick & Dom.

Moment of Joy also featured case studies of our music therapists and residents to highlight how beneficial the service is to people living with dementia. 4,250 CP volunteers across our services







residents have received music therapy



pays for an individual session

pays for a group session

members benefitting from shopping trips



6,103 members benefitting from dance/exercise/walking groups

One of these residents was 91-yearold Eileen Pegg from MHA Weston Queensway in Stafford, and her music therapist Chris Wilson. They appeared in the award-winning BBC One documentary Our Dementia Choir with Vicky McClure. The actress took a look at how music is beneficial to people living with dementia through the formation of a choir and used MHA's service to show the benefits of music therapy for those living with more advanced dementia.

MHA Hall Grange care home in Croydon also hosted BBC radio presenter Lauren Laverne when she came along to find out more about music therapy. She is an ambassador for Music for Dementia, which aims to get music for all people living with dementia and which MHA supports.

Dementia Adventure

Thanks to support from the National Lottery Community Fund, we have been working with Dementia Adventure to train staff and volunteers at 11 Live at Home schemes to think differently about dementia and how to help negotiate barriers which prevent people from living well with the condition.

In the past year, almost 1,500 Live at Home members have taken part in 137 activities, including nature walks and intergenerational forest days, garden and aquarium trips, animal handling, boat trips, fish and chip lunches at the seaside. outdoor cooking, woodland crafts and storytelling, allotment groups and many trips to local sites of interest.



Living life with friendships

Friendships are forged throughout MHA, whatever service is being accessed. Whether it is residents discovering common interests or Live at Home members agreeing to meet up outside of organised activities, there is friendship and enjoyment throughout.





Finding friends at Live at Home

Community-based Live at Home schemes provide support and services to help combat social isolation among older people living independently. Member-led, each scheme has a different programme of events and activities dependent on the needs and views of those taking part and range from traditional lunch clubs and befriending services through to short holidays, men's groups and exercise groups.

A group of members from Hampshire has even formed a cheerleading group, getting together to learn new moves and routines. Member Jenny Harbury said: "I never thought I would do anything like this. It is very invigorating. Some days you wake up feeling tired but it really wakes you up and is thoroughly enjoyable.

"The group is almost like family to me and I have made lots of new friends through it. It feels as though we have known each other forever. When you get older, you do not really know where to go to make new friends."

Sue Oliver became Live at Home's 12,000 member when she joined Stoke North LaH at the end of 2019, celebrating at their Christmas party to mark the milestone.

MHA volunteer Esme Mason has been honoured for an amazing 50 years of volunteering in the community of Penarth where she was born and bred. Esme (90) was named Volunteer of the Year in our Outstanding Service Contribution and Recognition (OSCAR) Awards after being nominated by scheme manager Linda Brownhill. In addition she was given a special certificate to mark her 50 years of volunteering.

She started volunteering with a knitting and sewing class for the over 65s at Trinity Methodist Church and joined Penarth Live at Home when it was set up by MHA in the town, helping prepare and serve hot lunches on a Wednesday.

Esme said: "I never expected anything like the award I got, just for doing something that I love. The people I meet are all lovely and that is a true reward in itself."

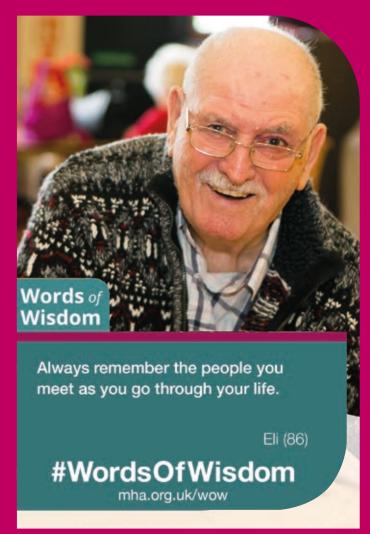
Words of Wisdom

We set about finding what pieces of advice our residents and members would give to themselves in younger years, culminating in our Words of Wisdom campaign and backed by broadcaster and presenter Gloria Hunniford.

In addition, we set about finding if young people today still valued older people and their views.

Almost half (48%) of 22-35 year-olds polled spend time with someone aged 65+ who they are not related to - like a neighbour or friend - every week, challenging the idea of growing divisions between older and younger generations, and revealing that older people are a trusted source of wisdom for millennials.

Of respondents who know someone aged 65+ or have a living grandparent, almost two thirds (64%) turn to them for advice, with one in 10 (12%) doing it all the time. Of respondents who would value advice around living a fulfilling life from someone aged 65+, the most popular topics are general life advice (73%), relationships (45%) and money (41%).







Living joyously in care

Laughter and joy is abundant in all of MHA's homes and schemes, whether it is a care home team performing a panto for residents, the joy a special birthday brings or new friendships forged through Live at Home.

Our care homes and retirement living schemes are communities within their local community and maintaining and forging links with outside groups is important. Additionally, our Live at Home schemes, where members are already part of the wider community, continue to forge links in their areas.

Bringing generations together

Many schools and nurseries now have links with their local MHA services, helping connect across the generations.

Residents at MHA Belvedere Manor care home in Colne, have been thoroughly enjoying weekly visits from local nursery group, Lynwood Nursery, allowing both young and old to bond while taking part in a variety of activities including craft-making, storytelling and finger-painting. They are often full of laughter and many individual friendships have started to blossom with the regular visits.

Every week, the youngsters – aged three and four – also bring with them homemade birthday cards for any residents who have been celebrating their birthday that week, which always fills them with joy.

Members of Reigate Grammar School have been hosting afternoon tea for local Live at Home members, with one commenting it was 'a wonderful opportunity for young and old to meet'.

Residents and staff at MHA Amathea care home in Workington, Cumbria, have been enjoying views of local landmarks after being presented with multiple pieces of artwork painted by the students of a nearby college. The home received canvas paintings of well-known sites from around

both Whitehaven and Workington, which were produced by Level 2 art students at Lakes College. These are now proudly hanging in the specialist dementia unit at the home.







Green care

Over at MHA Hall Grange care home in Croydon, residents have been taking part in green care activities as part of the project to restore The Wilderness, a seven-acre historical garden attached to the home. The garden, created by former Royal Horticultural Society secretary and local vicar, the Rev'd Henry Wilkes, is being restored thanks to a Big Lottery Heritage Fund grant.

Activities have included growing herbs and vegetables, making Christmas wreaths, bark rubbing, creating bird feeders from pine cones and paintings based on the flowers and plants found in the garden.

Throughout our homes and schemes, visiting animals for pet therapy sessions, an entertainer to brighten up a drab winter's afternoon or preparing for special festivals and occasions all help bring joy into the day to day life.

care services (care home and retirement living combined) rated as 'good' or 'outstanding' or equivalent by our regulators

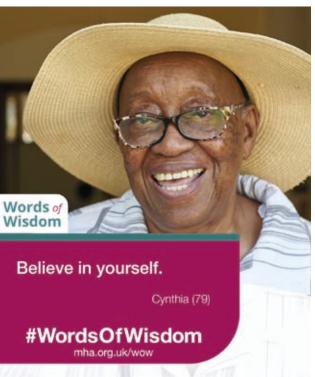
3,000 residents enabled to live independently within their own homes in retirement living



chaplains

care homes. providing a range of care including nursing, specialist dementia and dementia nursing

12,220 Live at Home members







Seizing the day

In care homes, staff go that extra mile to bring special joy to residents through Seize the Day, an initiative aimed at making dreams come true.

Throughout 103-year-old Lillian O'Neill's childhood, swimming was always a huge passion. She loved nothing more than to be in the water - so much so in fact, that even in her 70s she received tuition from her daughter's former PE teacher to complete a Life Saving award. She wanted to go back into the water one last time, so the team at MHA Richmond, in Surrey, helped fulfill her wish through a dip at St Mary's School's swimming pool.

Over at MHA Stones Place care home in Lincoln, staff made a trip back in time come true for 104-year-old Kathleen Brown. She returned to South Ormsby Hall, a private stately country home where she worked as a housemaid for the Massingberd-Mundy family for ten years and where she met her future husband, Bert, a chauffeur and gardener for the local Rector.

Keen biker Michael's eyes lit up when he heard the roar of a Triumph Daytona's 955 motorbike engine revving up outside MHA The Willows in Mobberley. The activity coordinator had found out about Michael's lifelong passion for motorbikes so invited the Christian Motorbike Association to visit him at the home. As well as being able to reminisce about his passion, Michael was able to rev up the throttle of the bikes.



More 'outstandings' bring smiles

Four more 'outstanding' inspection reports have brought the total of top rated homes and extra care housing services run by MHA, bringing smiles and joy across the charity.

The latest homes to receive the top rating from the Care Quality Commission were Queens Court care home in Bottisham, Cambridge, Mapplewell Manor care home in Barnsley and Horfield Lodge in Horfield, Bristol.

Additionally, Mickle Hill retirement living village in Pickering, north Yorkshire, has become MHA's first extra care housing community to receive an 'outstanding' report from CQC.

In addition, Starr Hills care home in Lytham St Annes held on to its 'outstanding' rating when it was inspected. In total, just under 90 per cent of MHA's services inspected are rated as good or outstanding by regulators.

care settings rated as 'outstanding' or equivalent





Living well in body and spirit

At MHA we don't just look after the mind and body but we also care for, and care about, the spirit.

That is evident in our chaplaincy service, which is in every home and retirement living setting, providing a source of comfort to residents and families alike.

The service stems from our roots in the Methodist Church and we are one of a handful of care providers who have chaplains funded through charitable donations to support residents and relatives.

Expression of Commitment

Our relationship with the Methodist Church was strengthened when an Expression of Commitment to demonstrate the two organisations working together was signed by MHA's Chair of Trustees, John Robinson, and Jill Baker, Chair of the Methodist Council.

The Expression of Commitment states that both organisations will work together to:

- explore ways of offering support to older people and develop initiatives to share with others as examples of best practice
- look for opportunities to work closer in areas such as joint research around issues affecting older people
- use their shared voices to encourage people in positions of power and influence to consider the needs of older people.



The inaugural Walter Hall Lecture

Named after MHA's founder, the Walter Hall Lecture has been designed as an annual event aimed at exploring the future challenges for the care and support of older people.

The inaugural event was held at Methodist Central Hall in Westminster and was given by former Government Minister and life peer Lord David Willetts, the current Executive Chair of The Resolution Foundation Intergenerational Commission.

He delivered a compelling lecture on the ongoing and increasing wealth, power and assets divide between the generations in our society to an invited audience,

exploring the issue of intergenerational fairness in his lecture which was based on his book 'The Pinch' and how baby boomers took away their children's future and why they should give it back.





Yuletide Yodel, Friendship Appeal and raising funds

Once again, we were astounded by the generosity of people through our Christmas Friendship Appeal. Each year, bulging sacks of Christmas cards arrive at MHA's head office for distribution to our Live at Home members and residents to show they are thought of during the festive period.

In addition, we launched the Yuletide Yodel, with the help of patron and broadcaster Pam Rhodes.

Yuletide Yodel encourages people to join together to sing carols and Christmas songs in their local community to help raise funds for MHA by holding a collection at the same time.

Pam said: "Yuletide Yodel is a great opportunity to get people together for a beneficial sing-a-long while raising funds to support older people."

People also supported MHA's other charity appeals, including the annual MHA Sunday.

WELL events

It is not just MHA's residents and members who have been benefiting from our expertise in looking after the spirit.

Worship Engagement in Later Life (WELL) training events were developed to support local people leading worship for older people, either in church or in a place of care. It includes guidance on how to lead services in a context of mixed cognitive ability and a demonstration of 'Biblical Yoga, developed by an MHA chaplain to help bring Bible stories to life.

WELL events can still be requested from MHA, and are supported locally where there is sufficient demand.

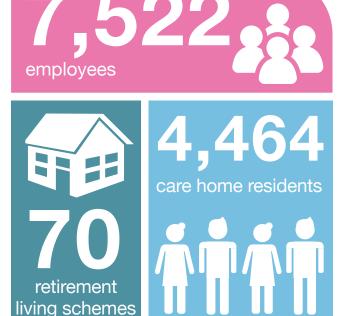


Since then, MHA's future plans have, of necessity, been scaled back as the charity reacts to dealing with the crisis. Whilst we are holding true to the core tenets of our strategy, our priorities clearly need to be about ensuring the continuing safety and care of residents, members, colleagues and volunteers; building on the shift we have made to move our community based services online, by phone and food deliveries to mitigate loneliness and isolation; focusing on occupancy recovery and the associated financial impact; and lobbying for support and reform of the

sector, whose condition has been so exposed by the crisis. Our fundraising plans are also having to be re-thought as events such as the London Marathon are cancelled and community activities such as abseils and bike rides are re-arranged.

These are immensely challenging times, but with our revised Business Plan in place and moreover the exceptional dedication of colleagues across MHA, I am confident we will sustain recovery and hold to our ambition to enable our residents and members to live later life well













mha.org.uk/wow

of residents are satisfied with the care provided by MHA (Your Care Rating survey)





Our Financial Summary

At the date of signing our financial statements for 2019/20, the world is still battling Covid-19. Although measures have eased and mortality rates have reduced in the UK, as yet there is no vaccine and no certainty that there won't be further waves of infection. No impact of Covid-19 is reflected in these financial statements, as the impact will be felt by MHA in 2020/21; as such these financial statements do not include benefits of accessing any Government and Local Authority funds made available to support the care sector during the pandemic.

These financial statements show that MHA made a net surplus in 2019/20 of £15.0m which is an increase on last year (2018/19: £9.8m) which is largely a result of increased charitable activities within our care homes. This enabled us to slightly improve our cash position.

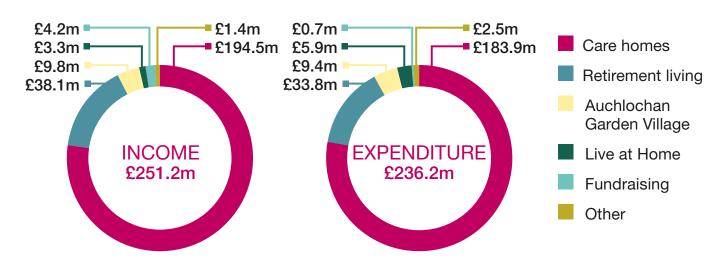
The surplus generated by our care homes has benefitted from continuing high occupancy levels, robust average weekly fees and benefits achieved through cost consciousness within the organisation.

As with our competitors, high turnover in front line staff, particularly nurses remains one of the key challenges for MHA. The other main challenge is the pressure on margins due to continuing local authority and NHS austerity.

We continue to invest in developing vibrant communities within retirement living settings which deliver the services that our residents desire. The flexibility we offer in our terms and the option of renting, buying or a combination are key to our service.

We are grateful for the generous donations received of £4.2m (2018/19: £5.1m) which have contributed towards our charitable causes.

5 year net surplus split	2015/16 £k	2016/17 £k	2017/18 £k	2018/19 £k	2019/20 £k
Care Homes	4,615	11,406	11,267	9,554	12,671
Retirement living	-977	1,536	8,532	5,063	2,680
Live at Home	-33	-2,265	-2,357	-3,135	-2,649
Donations and legacies	4,201	5,189	4,350	4,574	3,505
Other	-492	-3,521	-5,845	-6,241	-1,163
Total	7,314	12,345	15,947	9,815	15,044



Consolidated statement of financial activities

Income and expenditure

Income and endowments from	2019/20 £k	2018/19 £k	Variance £k
Donations and legacies	4,219	5,071	-852
Charitable activities			
Care homes	200,853	189,234	11,619
Retirement living	41,533	47,727	-6,194
Live at Home	3,266	2,377	889
Other	1,082	1,189	-107
Total charitable activities	246,734	240,527	6,207
Investments	285	161	124
Total	251,238	245,759	5,479
Expenditure on:	2019/20 £k	2018/19 £k	Variance £k
Raising funds	714	497	217
Charitable activities			
Care homes	188,182	179,680	8,502
Retirement living	38,853	42,664	3,811
Live at Home	5,915	5,512	403
Other	1,931	7,051	-5,120
Total charitable activities	234,881	234,907	-26
Other	569	576	-7
Total	236,164	235,980	184
Net (losses)/gains on investments	-30	36	-66
Net income/(loss) - surplus	15,044	9,815	5,229
Reconciliation of funds:	2019/20 £k	2018/19 £k	Variance £k
Total funds brought forward	286,890	276,992	9,898
Total funds carried forward	302,528	286,890	15,638



Consolidated statement of financial position

Balance statement

Fixed assets	2019/20 £k	2018/19 £k
Intangible fixed assets & investments	1,580	1,747
Tangible fixed assets	447,719	450,489
Total fixed assets	449,299	452,236
Current assets		
Total	60,556	56,073
Current liabilities		
Total	-43,056	-46,205
Net current (liabilities) / assets		
Total	17,500	9,868
Total assets less current liabilities		
Total	466,799	462,104
Creditors due after more than one year	-119,135	-122,998
Provisions for liabilities	-45,136	-48,701
Total assets before defined benefit pension liability	302,528	290,405
Defined benefit pension liability	0	-3,515
Total assets	302,528	286,890
Capital and reserves		
Total	302,528	286,890





















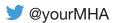


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