

ANNUAL REVIEW

2018



CELEBRATING
75
YEARS OF MHA





Willersley House staff celebrate their 'outstanding' in all areas Care Quality Commission inspection report



Contents

04	Foreword
06	Introduction
08	Our values
09	Stories from across MHA
10	Our care homes
12	Our retirement living
14	Live at Home
16	Our volunteers
17	Chaplaincy
18	Music therapy
19	Fundraising
20	Financial summary

A foreword from our
Chair of Board of Trustees

John Robinson



I am pleased to present MHA's Annual Review for 2017/18, especially as it covers the first year of my being Chair of the Board of Trustees.

During the first year of my tenure, I have had the pleasure of visiting more than 30 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. In addition, I am delighted to have welcomed our new Chief Executive Sam Monaghan. He joined us in February 2018 and is already bringing renewed enthusiasm and new ideas to MHA.

We do wonderful work that is particularly vital in these difficult times for the country. State support for older people is being steadily reduced in housing, care homes and in the community - at the very time that the need is increasing due to all of us getting older. 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.

MHA was founded 75 years ago by the Methodist Church, fulfilling a Christian duty to care for all, no matter their faith or background. Today we have 4,934 residents in 90 care homes, 2,689 people in 70 retirement living communities and 10,588 people we support in 57 Live at Home schemes. Our founders can be proud of MHA's work today, except I am sure they are 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 support we give through our Chaplaincy service. Chaplains are available to residents, families and staff in all our care homes and retirement living schemes, something which was started right back when MHA was founded, making sure we truly care for the mind, body and spirit.



Music therapy group session

What is important to MHA is the quality of life we offer for older people. But we need to make sure that we have the funding available to enable us to do this. This review shows we made a net surplus in 2017/18 of £15.9 million which was re-invested in the delivery and development of services. However, this was a slightly lower figure than the previous year, largely due to the completion of some new developments but we are conscious that we need to retain an on-going focus on our level of surplus.

The Board is also mindful of the need to ensure that all our properties are of a good standard and, following the focus in recent years on a number of new developments, has agreed to pause further new schemes for the next year to ensure the good order of our existing stock, whilst also building our cash reserves.



An introduction from
our Chief Executive

Sam Monaghan



In 1943, the Revd Walter Hall was provoked to action after encountering those who were ‘one piece of bad luck away from the Workhouse’ – the destination for many in poverty in later life at that time.

He wanted to do the right thing by these people and his social and pastoral concern led to the formation of MHA, supported by the Methodist Conference, with the opening of our first care home, Ryelands in Wallington, Surrey, in 1945 for 12 women.

75 years on, MHA continues Revd Hall’s work in providing support, care and accommodation for older people. Our care homes, retirement living and community-based schemes now serve over 18,300 older people. We employ 7,000 people who are supported by an invaluable 5,000 volunteers.

Our main objective is to continue to reach out to more older people through our services, while at the same time ensuring that we maintain our high quality offer of care, accommodation and support across England, Scotland and Wales – with 87 per cent currently rated “Good” or “Outstanding” by our regulators.

However we are living in an era of increasing financial pressures on the adult care sector for a wide variety of reasons. Continued Government austerity has resulted in smaller budgets for local authorities and health services. This, in turn, has meant that the amount they are willing and able to pay care providers such as MHA does not cover the true cost of the care we provide.

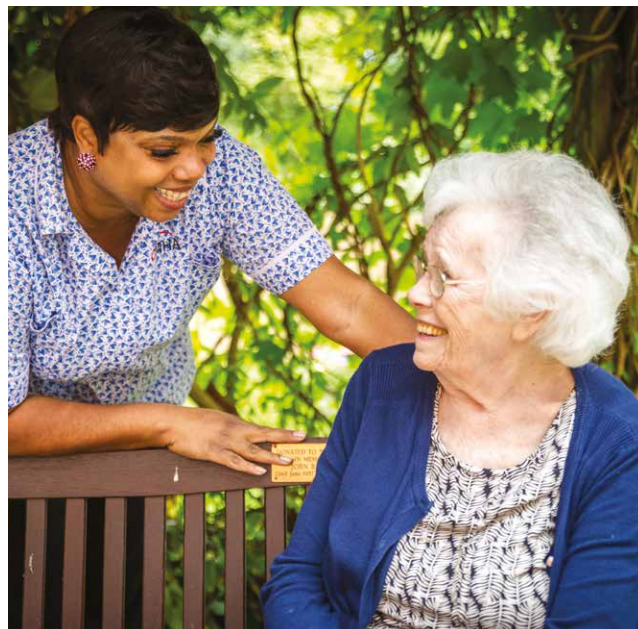
We are fortunate in that many of our residents are able to fund their care place themselves. Unlike other providers, however, we will not ask a resident to find another home if their personal funds run out and they have to be publicly funded and are unable to pay a top up fee.

We take our role as a charity very seriously and believe that everyone should have the right of access to quality care.

Like others in the sector, staff costs are our biggest expenditure. We need to make sure we are both ethical in our employment practices and that we attract a high calibre of person with the right attributes and values to care for our residents and members.



First MHA residents at Ryelands in Wallington, Surrey.



Enjoying the garden at Abbey Park care home

We believe that improving pay and benefits will enable us to attract and retain a committed team of colleagues for the benefit of residents within our homes and schemes, recognising the positive impact that the continuity of carers has upon their care and well-being.

This is why we introduced the Real Living Wage for our staff and increased the pay rates for nurses from 1 April 2018.

Uncertainty over funding also continues to be exacerbated as the long-awaited Green Paper on the future of adult social care was delayed and is now expected in the autumn of 2018. We hope the Government listens to the voices of care providers, such as ourselves, to solve the long term issues facing the sector.

As well as the issue of funding, these include attracting and retaining a skilled workforce, the associated potential impact of Brexit, as well as the lack of specially-designed housing for older people.

Alongside our Board, we continue to explore how we can operate with increased efficiency and effectiveness to reduce our costs to enable us to invest even more in supporting older people. We also continue to work hard on increasing our fund-raised income and are delighted that support for MHA and our work continues undiminished 75 years on.

Joining MHA at this time, I am immensely proud of the care and support that I have already seen demonstrated as I've had the privilege of visiting many of our homes and schemes. It is certainly a challenging time for the sector, but one which, drawing upon its heritage, skills and values, I am confident MHA will meet, adapting and innovating as it has over the past 75 years.

Our values



MHA is a values-led charity. They help guide our work and underpin everything we say and do. They guide how our staff and volunteers behave in all their dealings with residents and members, their families and friends, with colleagues and all our stakeholders, from local authorities through to GPs and MPs.

Our values are:

We *respect every person* as a unique individual

We treat others, especially the most frail and vulnerable, with *the dignity we wish for ourselves*

We are *open and fair* in all our dealings

We always seek to improve, to become *the best we can be*

We *nurture* each person's *body, mind and spirit* to promote a fulfilled life



Living out MHA's values at The Homestead care home



Live at Home member Annie Ashby recording MHA's BBC Radio 4 charity appeal



Music therapy bringing moments of joy

Stories from across MHA

Residents, volunteers, staff and families speak about the care and support given by MHA to older people.

David Bennett's mother Dorothy lived at Starr Hills care home in Lytham St Annes, where she and the family received support from chaplain Richard Golding said: "The Chaplain was very much involved in my mother's end of life care. He was there nearly all day on the day she died. He talked to her a lot. He comforted her and, perhaps the biggest thing he did was for the family afterwards. He came and gave a talk about his experience with my mother at her funeral."

The effects of music therapy one-to-one sessions on residents can often have a profound impact on those who care for them., as carer Leone said: "We had a resident who did not speak a lot but after one-to-one music therapy he came back smiling. That smile on his face - words just can't describe it. His face just lit up. It was priceless."

Sue Prangmell who is living with dementia, joined Basingstoke Live at Home scheme after manager Claire McEnoy visited a memory club she attended. Sue said: "Live at Home has changed my life as I can get out and I can talk to people. There's just no need to just sit at home now. I would urge others to join Live at Home as you can find enjoyment here."

Willersley House care home resident Pamela Wilde (80) said, "We're one big, happy family here. The staff always have time to talk to you and I know that I am listened to and respected. They really put themselves out and I feel looked after and cared for, but I'm an independent person; they haven't taken that away. I am so happy to have found the right home."

Volunteer Wendy Gater has been helping out at Claybourne care home for eight years, where she runs the 'Poetry and Natter Club' as well as supporting residents on trips out, whether that's going to the local Chinese takeaway or to the theatre. She said: "I thoroughly enjoy the opportunity to socialise with the residents and knowing I have made someone else's day better."

Our care homes



Caring at the 'outstanding' Willersley House care home

Care homes are where MHA started with the opening of its first home, Ryelands in Wallington, Surrey.

In 2017/18 MHA expanded its portfolio of homes to 90 through the opening of Oak Manor in Shefford, Bedfordshire, and Montpellier Manor in Stainton near Middlesbrough. Together these homes provide care and support for an additional 149 residents, bringing the total number of older people we care for in our homes to almost 5,000.

Our reputation for providing quality care continued to be enhanced when we finished the year with 87 per cent of our care services rated as 'good' or 'outstanding' by our regulators.

We were particularly delighted when we received two additional 'Outstanding' inspection results from the Care Quality Commission (CQC), the social care regulator in England, for The Martins care home in Suffolk and Willersley House care home near Hull. They join Cedar Lawn in Stratford upon Avon and Starr Hills in Lytham St Annes.

Willersley House is the first of our homes to achieve 'outstanding' in all five categories considered by the CQC and one of just eight homes across England to hold this accolade.

We also achieved a 96 per cent overall resident satisfaction rating in the independent Your Care Rating survey.




Chaplain Caroline Dobinson spending time with residents

Our approach to improving the quality of care provided was recognised when MHA was short-listed for an “Innovation in Care” Award at the prestigious Laing Buisson awards in 2017.

This commitment to quality care seeks to enhance well-being in the round – body, mind and spirit. Our homes increasingly seek to bring the life of the local community into the daily lives of our residents, with intergenerational projects with pre-schools, schools and youth organisations.

MHA has also always provided its residents with spiritual support through its Chaplaincy service and now employs 140 chaplains in its care homes and retirement living communities. Their work was recognised when the team won the 3rd Sector Care Award for our End-of-Life Care and specially designed programme called ‘The Final Lap’.

90 care homes 

87% care services rated ‘outstanding’ or ‘good’ 

96% overall resident satisfaction rating in independent Your Care Rating survey



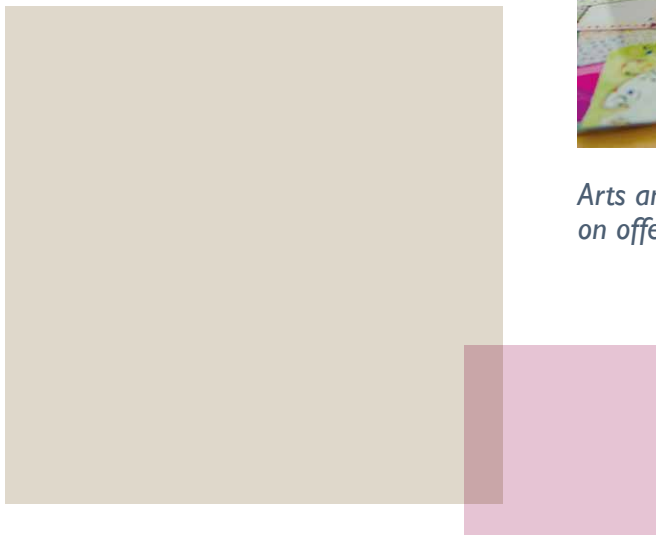
Visiting family is always a delight for retirement living residents



The courtyard at Mickle Hill



Arts and crafts are just some of the activities on offer for retirement living residents



Our retirement living

MHA's retirement living offer enables 2,700 older people to continue to live independently in their own home but with the security and knowledge that help is available and can be tailored to their individual needs.

MHA is a founder member of the Association of Retirement Care Operators (ARCO) and has worked with them to make sure all our materials provided to prospective residents are compliant with their consumer code.

New communities have been developed at Maidment Court in Poole and Wellesley Court in Waterlooville, Hampshire, as new residents moved into the developments in 2017/18. These two developments mean that MHA now has 72 retirement living communities across England, Scotland and Wales.

Residents are part of thriving communities with a range of activities and events available to them should they chose. In addition, they have the peace of mind knowing care is available 24-hours a day through an on-call system and the knowledge that they can have packages of care tailored to their needs if and when they require it. Our regulators currently rate 95 percent of services inspected as "Good" or "Outstanding" in this respect.

MHA's collaboration with retirement living developers Adlington has also continued, with us providing the care and support for residents at their new developments in Urmston and Stafford.

In addition, our retirement villages at Mickle Hill in Pickering, North Yorkshire, and Auchlochan in South Larnarkshire, Scotland, continue to build as communities. At Auchlochan, the re-developed Nethanvale setting continues to welcome new residents to its established community set among 50 acres of landscaped gardens.

We constantly review our strategy in relation to retirement living. As a result of that work, it was decided to dispose of sites we were considering re-developing at Exeter, Woking and the Isle of Wight.

2,700 residents supported in our retirement living

95%



of retirement living with care services inspected rated as 'good' or 'outstanding'

Live At Home

MHA's Live at Home schemes were developed following discussion by our Board of Trustees back in 1988.

They were looking at how they could support older people who still lived independently in their own home. One member remarked their parents wanted to continue to 'live at home, not just stay at home' - still able to live life to the full and enjoy a wide range of activities and events.

Lichfield Live at Home scheme was the first scheme to be set up 30 years ago with volunteers Gillian Eggleston and Kathy Peat

still involved today as the chair and vice chair of their organising committee.

Today MHA runs 57 schemes, helping combat loneliness and isolation among more than 10,500 older people.

New schemes for 2017/18 included nine in Hampshire through a contract with the County Council. The new schemes join established ones already running in Portsmouth and Winchester and mean that Live at Home now covers the entire county of Hampshire.

57 Live at Home schemes



£110,000 on average to run a Live at Home for a year scheme

£24 

to provide a Live at Home member with lunch club for a month

10,588  people supported by Live at Home schemes



You're never too old to have fun when you're a Live at Home member

Across the country, members at each scheme are involved in its running, helping agree on what activities and events, including where to go for day trips and short holidays. In addition, schemes often work in partnership with others to provide local services.

Stoke North Live at Home has partnered with local charity Father Hudson's and together were successful in being awarded a Big Lottery grant to expand and be able to offer support to even more older people in and around the city.


Big Lottery funding is also helping to fund an innovative project developed by Ellesmere Port and Neston Live at Home to support older people who have been made redundant in the area. The 'Not Ready Yet' project aims to support people in their mid-50s and older to remain engaged with their local communities and help them move forward. The project is offering financial, legal and careers advice, retraining for those who want to get another job and volunteering opportunities and social activities for those who don't.

Our volunteers



At MHA we could not provide the help and support we do for older people without our volunteers.

2,600 volunteers support our Live at Home schemes

1,200  people take time to volunteer in our care homes

Five thousand people, mostly in later life themselves, give up their time for us – and we are truly humbled and grateful for their support and the skills and experience they bring. Volunteers are key to all our services, especially our Live at Home schemes.

Our volunteers of all ages play an active role in befriending and helping to run numerous craft and physical activities in all our homes and schemes. Residents and members wouldn't be able to go on the varied days out without our volunteers. Nor would hundreds of meals be prepared and served in lunch clubs, cakes baked and coffee mornings organised to raise funds for homes and schemes and open days. Volunteers also play a crucial role in our support services and enable our fundraising activities to take place.

Chaplaincy



140 trained Chaplains



78,970



chaplaincy hours
provided for residents

Right from the start, MHA has always considered the spiritual aspects of caring for older people, as well as their physical and mental wellbeing.

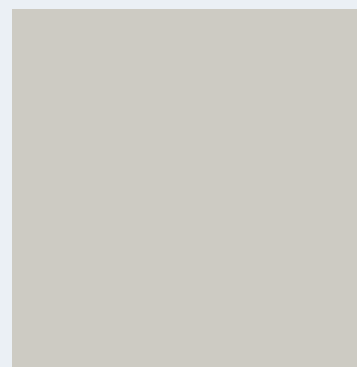
Chaplains have been a constant presence in our care homes since Ryelands opened almost 75 years ago and have now been introduced into our retirement living schemes to support residents.

At first Chaplains were volunteers, usually the local Methodist minister. But at the turn of the century, their roles had expanded and their contribution to the lives of residents was such that they became paid-for roles, funded from charitable donations.

Today MHA is considered to be the leading employer of Chaplains in care homes.

One Chaplain describes it as their job 'to make sure there is a sense of community in the home and scheme, of togetherness, of belonging, of purpose, of pleasure, of fun, of joy, of support, of comfort and of healing'.

Another talks about it being about 'enabling people to get to that place where they can feel calm and fulfilled'.



Music therapy

26 music
therapists



In 2008 MHA demonstrated its commitment to innovation in the field of care and support for older people with the introduction of music therapy into its homes specialising in dementia care.

Today, we are one of the largest employers of music therapists for older people in the country, helping unlock memories, reducing symptoms of agitation, anxiety and depression common in people living with dementia and bringing moments of joy to residents, relatives and carers.

We employ 26 music therapists who work in our 63 specialist dementia care homes.

Research carried out by MHA into the effects of music therapy reveals the difference it makes to the life of not just people living with dementia and receiving the service but also to the life of the home.



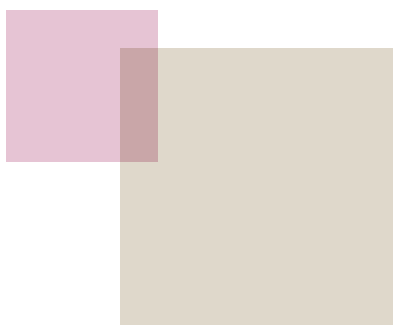
817



residents received
one-to-one music
therapy

11,850 one-to-one,
group and open
music therapy sessions

As one manager says: "Music therapy has tremendous value. It's like it opens a window and suddenly the individual is able to reach out mentally and connect. The smile of recognition you then get is amazing - the joy on their faces is indescribable."



Fundraising

Our supporters have once again been brilliant throughout the year as they have helped raise money to support the thousands of older people who receive our services each day.

We organised a series of events across the country which saw people abseil down as well as race each other up the stairs at Portsmouth's iconic Spinnaker Tower and abseil off Derbyshire's Monsal Head viaduct and the tower at the National Maritime Museum in Falmouth.

Derbyshire was also the setting for our first walk, with 60 people trekking down the 17-mile High Peak Trail.

Supporter Heather Wells from Oxfordshire ran the London Marathon in aid of MHA, saying: "I have a huge amount of respect for the work MHA does with dementia, having worked in this area myself. Work such as providing music therapy free of charge so people with dementia have a way of expressing themselves. I'm also supportive of the Live at Home schemes which helps combat loneliness."



Fundraiser Carl goes over the edge for MHA



Fundraisers tackle the High Peak Trail in Derbyshire to support MHA

Legacies also continue to be a source of income for MHA and we are grateful for those who remember us in this way.

We held five **For all our tomorrows** supporter events to initiate conversations about what it's like to grow older in today's society. Speakers include representatives from MHA to discuss how MHA, as a charity and care provider, has the opportunity to enhance and improve the lives of our older generation.

Financial summary

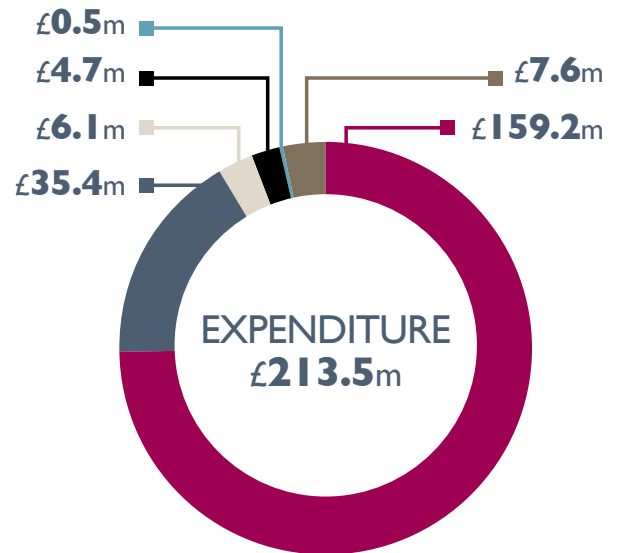
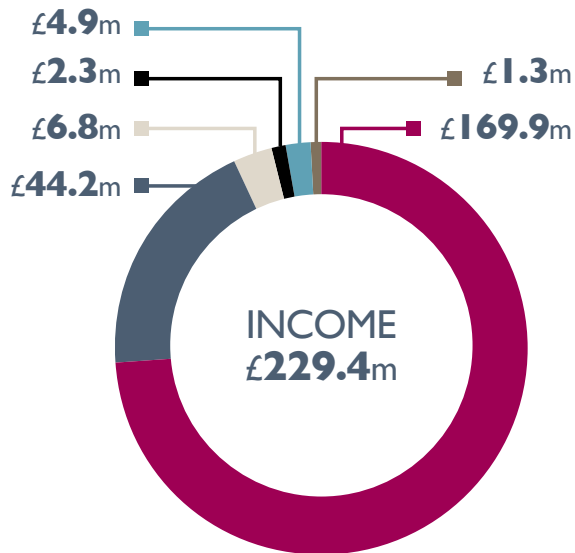
Care Home performance continues to be strong driven by high occupancy levels and robust average weekly fees despite the challenge from austerity reducing available funding from Local Authorities. Retirement Living performance is buoyed by strong Housing for Sale performance in the year with the completion of Maidment Court in Poole. Live at Home continues to provide services underpinned by our Charitable concerns. Other costs fluctuate significantly over the period shown due to movements in actuarial gains on the defined benefit pension scheme as well as interest rate swaps movements; both these impacts are driven by external market factors.



More than 18,200 older people are supported by MHA every year

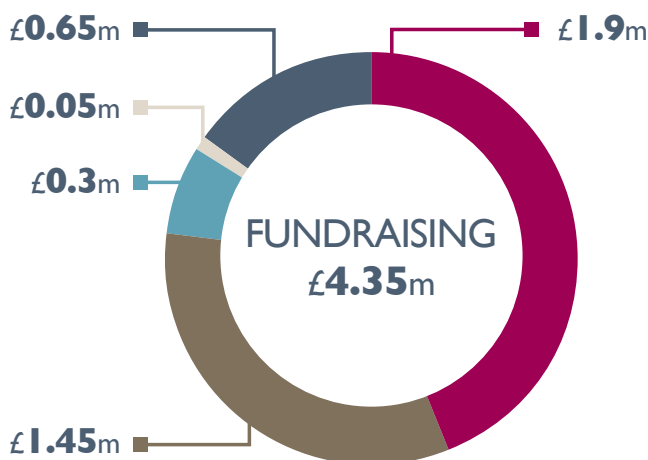
5 YEAR NET SURPLUS SPLIT	2013/14	2014/15	2015/16	2016/17	2017/18
Care Homes	3,182	7,534	4,615	11,406	11,267
Retirement Living	4,492	-823	-977	1,536	8,532
Live at Home	-1,561	-2,072	-33	-2,265	-2,357
Donations and Legacies	4,435	4,407	4,201	5,189	4,350
Other	-3,237	-3,342	-492	-3,521	-5,845
Total	7,311	5,704	7,314	12,345	15,947

Finances



- Care homes
- Live at Home
- Retirement living
- Fundraising
- Auchlochan Garden Village
- Other

Fundraising Expenditure



- Chaplaincy
- Volunteering
- Music therapy & reflexology
- Live at Home
- New Life Enhancing Facilities

CONSOLIDATED STATEMENT OF FINANCIAL ACTIVITIES

INCOME AND EXPENDITURE

INCOME AND ENDOWMENTS FROM:	2017/18	2016/17	VARIANCE
Donations and legacies	4,931	5,752	-821
Charitable activities			
Homes	174,307	159,147	15,160
Retirement Living	46,556	38,023	8,533
Live at Home	2,333	2,277	56
Other	1,227	1,762	-535
Total charitable activities	224,423	201,209	23,214
Investments	76	128	-52
Total	229,430	207,089	22,341
EXPENDITURE ON:	2017/18	2016/17	VARIANCE
Raising funds	581	563	18
Charitable activities			
Homes	163,040	147,741	15,299
Retirement living	38,024	36,487	1,537
Live at home	4,690	4,542	148
Other	6,843	5,233	1,040
Total charitable activities	212,597	194,003	18,024
Other	291	242	49
Total	213,469	194,808	18,091
Net (losses)/gains on investments	-14	64	-78
Net income/(loss) - surplus	15,947	12,345	4,172
RECONCILIATION OF FUNDS:	2017/18	2016/17	VARIANCE
Total funds brought forward	253,528	244,198	9,330
Total funds carried forward	276,992	253,528	24,034

CONSOLIDATED STATEMENT OF FINANCIAL POSITION

BALANCE SHEET

FIXED ASSETS	2017/18	2016/17
Fixed assets		
Intangible fixed assets & Investments	2,365	3,963
Tangible fixed assets	465,075	458,399
Total Fixed Assets	467,440	462,362
CURRENT ASSETS	2017/18	2016/17
Total	35,664	38,940
CURRENT LIABILITIES	2017/18	2016/17
Total	-41,594	-38,252
NET CURRENT (LIABILITIES) / ASSETS	2017/18	2016/17
Total	-5,930	688
TOTAL ASSETS LESS CURRENT LIABILITIES	2017/18	2016/17
Total	461,510	463,050
Creditors due after more than one year	-128,113	-137,193
Provisions for liabilities	-50,451	-59,245
Total Assets before defined benefit pension liability	282,946	266,612
Defined benefit pension scheme liability	-5,954	-13,084
Total Assets	276,992	253,528
CAPITAL AND RESERVES	2017/18	2016/17
Total	276,992	253,528



CELEBRATING
75
YEARS OF MHA

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MHA is a registered charity in England and Wales
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A full copy of our annual report and accounts
is available at www.mha.org.uk



Setting Standards for
Retirement Communities



Registered with
**FUNDRAISING
REGULATOR**

THE 3RD SECTOR CARE **3**
AWARDS 2017
WINNER

