

Annual Review



2020 - 21





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Please note that our residents do not need to wear Personal Protective Equipment (PPE). In addition, some images were taken before the requirement to wear PPE was brought in.



Foreword from

**John
Robinson
CBE**

Chair, MHA Board of Trustees

The last twelve months have been extraordinarily difficult for the whole country coping with the pandemic and none more so than for our residents, members, staff and volunteers. They have all been exceptional in rising to the challenges presented by Covid-19.

With our homes and schemes closed to visitors for most of the year I have not been able to visit any in person but, together with other Trustees, have provided support through telephone and video calls.

We have had to adapt a number of our services in order to continue to provide support to as many older people as we can. Our staff and volunteers are to be commended for the level of dedication and care they have provided. As we now move into the next phase of living with Covid-19 it is vital that we continue to play our part in seeking a proper settlement for older people's care so that we can enable them to live later life well.

MHA was founded 78 years ago by the Methodist Church. Today we serve over 18,300 older people across our 89 care homes, 70 retirement living communities and 49 MHA Communities schemes (formerly Live at Home) supported by 6,947 staff and 3,750 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 different 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. We have been looking at how we can extend this into our MHA Communities services, making sure we truly care for the mind, body and spirit of all those we care for and support. The work of our chaplains has been particularly important during this past year as they have provided support

and listening for so many during this time of national crisis due to the Covid-19 pandemic.

Despite the pandemic we have continued our work to improve the governance of the charity which has included a commitment to be fully compliant with the Charity Governance Code. I am pleased to say that this work is almost complete and we will be formally adopting the Code in the coming financial year.





Introduction from

Sam
Monaghan

Chief Executive of MHA

By the start of 2020/21, the Covid-19 pandemic was well underway and has dominated our work throughout the year.

The plans we had for the second year of our OneMHA Strategy, were laid aside, as we sought to respond to the crisis and protect those most vulnerable to its ravages. After the first wave we put in place our Covid-19 Management and Recovery Programme and, although much was achieved, the second and third lockdowns once again required us to focus our energies on our day to day response to the pandemic. Testing and vaccination programmes alongside

support to our residents and their families, our members and colleagues have been our priority.

Throughout, we made sure our homes and schemes were as updated and informed as possible, always following Government guidelines and advice.

Strategically we began following the approach adopted by public bodies when responding to major incidents, establishing a Gold Command structure to ensure effective communication and responsive action planning across every part of MHA. Daily we would hear updates from across the organisation of how it was being affected, ensure the implementation of Government guidelines and marshal our resources to ensure the appropriate staffing of homes and schemes and sufficient supplies of Personal Protective Equipment (PPE).

We developed our sector-leading data dashboard to record cases of infection across our services of residents and staff, mortality rates, levels of PPE, expanding as the months rolled on to include the testing and vaccination rates of residents and staff.

Care homes and retirement living schemes adapted to support contact between residents and their loved ones and our MHA Communities, no longer able to provide face to face services, developed telephone befriending and food delivery services, combined with garden gate conversations to ensure members weren't left isolated.

As spring became summer, we were able to step down Gold Command to a lower key Covid Management Group, but always with the view that these arrangements could be reinstated if and when necessary. Our dashboard continued to monitor data.

Care homes were able to start garden visits for family and friends, giving a much needed boost to all, especially as we got the regular testing we had called for to enable us to identify cases at an early stage.

Our Mission

To “enable people to live later life well” by inspiring the best care and wellbeing at every stage of later life.

Our Values

- We **respect** every person, treating them with dignity
- We **nurture** mind, body and spirit
- We **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.

mha In Community

Connecting, developing and co-locating our services; working with partners to improve access to support, activities and local faith and inter-generational engagement; increasing quality, effectiveness and efficiency through greater collaboration; and widening our influence locally, including the potential for increased volunteering and fundraising.

mha Enhancing Later Life

Encouraging the development and sharing of new ways of working and new models of care and support; better evidencing the impact of our services such as chaplaincy and music therapy to improve delivery and more broadly influence and benefit all older people; and enhancing the quality and consistency of dementia, end of life care and other practice developments through accreditation.

mha Fit for the Future

Improving our infrastructure and processes and embracing digital technology to support increased quality, effectiveness, efficiency and financial and service planning.

mha People

Attracting, developing and retaining the right people to build and enhance our mix of experience and skills; and maximising their ongoing potential through professional, personal and career development within in a collaborative, supportive and inclusive culture.

Fundraisers picked new and unusual ways of raising funds to help us support older people, with trusts and foundations supportive of our applications. Companies donated PPE for staff and supported their local community-based schemes; and relatives and local communities supported our homes with gifts to know they were not forgotten.

Sadly in the autumn the second wave was upon us and Gold Command was reinstated. We continued to make our voice heard in Government battling to make sure we continued to have regular testing, and that policy makers understood the impact of decisions on care homes.

The news at the end of 2020 that vaccines had been approved was very welcome. Our residents, members and staff were among the first to receive their vaccinations.

By the end of the year, our care homes were once again starting to welcome limited visitors, the number of staff and residents receiving vaccines was growing rapidly and MHA Communities was starting to plan for the day when they could start to meet face-to-face once again.

As we ended the year we started to pick up again the strands of our One MHA Strategy, exploring how we can enhance the experience of those we care for and support and strengthen the efficiency and effectiveness of the organisation. Our priority for the coming year, however, remains our response to the pandemic; ensuring the welfare and wellbeing of our residents, members and colleagues; rebuilding MHA after what has been a tumultuous year; and pressing the Government to make good on its promise to reform adult social care through our FixCareForAll campaign.

Our second family



Caring for our care home residents

MHA care homes have always been a bustling hive of activity with family and friends popping in to see residents, join in activities, support their care or take their loved one out for lunch.

But all that changed. By the time 2020/21 started, we had already taken the difficult decision to close our care homes before the official lockdown to protect our residents, the most vulnerable group to Covid-19.

We increased and strengthened even further our infection prevention and control measures, we followed Government guidance on the use of PPE and we took every precaution we could to protect our residents.

But still the virus crept into our care homes. Like many providers we sadly lost residents to coronavirus as well as colleagues and we mourn all of them. They were members of our extended family.

Our care home teams rose magnificently to the challenge of keeping our residents active and engaged throughout.

Zoom and Skype calls became the norm for many residents. Homes embraced social media, using their Facebook pages to keep people updated, and helping to showcase the many different activities happening across MHA's care homes.

Local communities came to homes and clapped for care workers, donated goody bags for residents and staff, and singers came to entertain residents by performing outdoors. Birthdays continued to be celebrated with parties and cakes crafted by our talented chefs.

MHA's chaplaincy service supported residents, staff, families and friends spiritually throughout the year and helped lead MHA's Memorial Day in September to remember those we had lost.



For our residents living with dementia, a fundraising appeal helped buy robotic cats for a number of homes, providing comfort for people. Homes fundraised for large, interactive tablets which not only help residents stay in touch with families more easily but also provides a myriad of activities for them to enjoy.

Outdoor visits for family and friends in the summer led to many happy reunions and memories with a visit at MHA The Homestead care home in Carterton, Oxford, showcased on BBC News. We introduced our Essential Family Carer for residents whose health was really suffering from lack of contact with family and friends, and indoor and specially-designed pod visits started up, albeit behind screens and no contact.



As cases in the community once again started to rise as autumn became winter, so too did the numbers of cases in our homes among residents and staff.

December brought some welcome news in the form of vaccines being approved and rolled out. Across MHA, residents and staff rolled up their sleeves as vaccinations against Covid-19 were given to care home residents and staff, some of the first to receive them.



Sadly we had to close one of our care homes, MHA Foxton Grange in Leicester, for reasons not related to Covid-19. The home had been losing money for a number of years as it was too small to be maintained as a specialist dementia care home and there was over provision in the area.

By the time spring arrived, almost all our residents and staff had received their first dose of vaccination. Cases were declining once more and, most importantly for our residents and their family and friends, indoor visits with limited personal contact were allowed again.



Supporting our retirement living residents

Our retirement living residents live independently in their home whilst enjoying the support and companionship offered by their individual schemes.

The first lockdown in 2020 meant many of them had to shield due to their vulnerability and communal lounges and facilities had to close.

This is where MHA's wellbeing service came into its own.

Residents felt supported with staff making sure prescriptions were collected, daily calls made to check they were ok and shopping picked up for them. While residents weren't able to meet for meals in our bistros, the bistros brought meals to our residents in their own homes.

Some of our more musical staff took advantage of the warmer months to entertain residents with outdoor sessions, with many residents joining in from their windows. We held socially distanced VE Day events. At Auchlochan Garden Village in Scotland, the chaplains set up beside the side of the lochan and sang familiar World War Two songs with residents joining in, singing and dancing, from their balconies while the bistro delivered boxes to residents for afternoon tea.

Our chaplains continued their support for residents and their families, with some holding outdoor services and broadcasting hymns and readings for all to join in with.

And local communities rallied round to support our retirement living communities with choirs and bands visiting schemes across the country as well as delivering goodies to support residents and thank staff.

St John's Garden Centre in Barnstaple delivered plants to MHA Norah Bellot Court, meaning on Christmas morning every resident woke to find Father Christmas had visited and left a pot of hyacinth bulbs outside their door.

Pat Flynn became MHA's first resident to receive the vaccine. Pat lives at MHA Pilgrims Court retirement living scheme and was invited to have the vaccine before a hospital appointment.

She said: **"It was very exciting. I was the first older person to receive the vaccine at Newcastle hospital and was filmed by Sky News. I was a bit dubious about the vaccine a couple of months ago, but then I thought that they wouldn't give it to us if it wasn't safe. You have a better chance with it compared to getting Covid."**

Supporting our communities

MHA Live a Home schemes continued to provide vital services for older people living independently in their own home to help alleviate loneliness and isolation.

Each week, thousands of older people would usually meet up for activities as varied as cheer leading to sessions helping them master technology, from trips out to craft sessions.

But these all had to be paused when lockdown descended with many members having to shield due to their age and health. The focus became meeting their immediate needs.

From that initial response, the service started to look at how it could support people going forward. The focus was on:

Making regular contact with members for wellbeing checks and befriending calls

Developing online activities and helping members to access these



Carrying out doorstep deliveries of food, goodie bags and activity packs to help keep minds active

Turning attention to social distanced walks when guidance allowed, outdoor exercise groups and befriending visits in gardens



Supporting our communities (continued)

In the summer of 2020, a wholesale review of the offer provided by MHA was carried out and in early autumn MHA Live at Home became MHA Communities. The most exciting development was the introduction of MHA Digital Communities which will build into a live and on-demand online programme of different activities along with the necessary support to get members online.

One of the best ways of highlighting the impact of MHA Communities is to take a look at Hampshire, where 2,110 members are receiving support, a rise of more than 250 members since lockdown started in March.

Between April and September, the schemes helped members with 6,640 food parcels and collected and delivered 895 prescriptions to shielding older people, and from July to September, delivered 398 afternoon teas, cold lunches and cakes.

Almost 900 older people in Hampshire have been receiving befriending services with many more linked through the buddy and telephone trees to make sure they are kept connected. Volunteer befrienders have commented that the work they are doing is helping them with their own isolation during lockdowns and family members have stated that it alleviates their fears for relatives.

Already 75 members a week are taking part in Zoom activities ranging from singing for wellbeing, Tai Chi classes, cheer leading and quizzes with 100 more taking part in group chats.

Members receive a monthly activity pack, including craft supplies and instructions. In addition, schemes also deliver books, DVDs and jigsaws from their lending libraries.

The key is that all members are supported at an early stage if they start to develop any problems or issues, enabling schemes to signpost them to low level interventions if necessary.



Making our voice heard

Our work on lobbying and influencing key people in Government became key to the way we approached our response to the pandemic.

But it was not just for MHA that we spoke out. It was for the whole of our sector. We worked to make our voice heard, not just by ourselves but alongside our trade bodies like Care England, the National Care Forum (NCF) and the Associated Retirement Community Operators (ARCO).

Early on we recognised that testing was key to knowing how widespread cases were in our care homes. But where we knew homes had an outbreak, testing was sporadic and difficult to access in the early days.

Through media interviews with programmes such as Radio 4's Today and PM, discussions with officials in the Department for Health and Social Care (DHSC) and working with our trade organisations, we fought for this recognition. And in May we were successful in joining the pilot for whole home testing. But we didn't give up the battle, continuing to press the Government until it announced routine whole home testing for staff and residents.

We also fought for enough PPE to be made available for care home staff after we recognised it was being held for frontline NHS personnel, arguing our need was as great as theirs. And we won that argument, again after numerous media interviews and discussions with the DHSC.

In June 2020, BBC Two's Newsnight dedicated a programme to how MHA had been affected so far by the pandemic, hearing from care home managers and workers and our directors. The Guardian ran numerous stories with comments from MHA's Chief Executive Sam Monaghan and their podcast interviewed MHA Westbury Grange care home manager Julie Roche about her experiences.

Our work in developing a dedicated dashboard to data on how Covid-19 was affecting MHA's services was featured in a BBC Two documentary, Lockdown 1.0 - following the science.

MHA is a member of the working group of the All Party Parliamentary Group on Adult Social Care. We have given evidence to the Health and Social Care Select Committee inquiries on workforce burnout and resilience in the NHS and social care and on social care - funding and workforce.

In addition, we have met with MPs who have MHA homes and schemes in their constituencies and strengthened links with groups such as Independent Age and John's Campaign.

MHA became involved with a number of national groups with the DHSC, including testing and the rollout of vaccinations.

We will continue to speak out and battle for the voice of our residents and members to be heard as policy changes and decisions are announced and made.

A big 'thank you'

Throughout the pandemic, the support for MHA and its services has been incredibly heart-warming.

While our community fundraising activities like the numerous spring, summer and Christmas fairs in our homes and schemes couldn't go ahead in person, people have been finding different ways to support MHA and help our residents and members live later life well.



Retired teacher Joy usually runs Singing for Wellbeing at two MHA Communities schemes. As they were not meeting in person, she decided on a mini marathon to play and record 26 songs non-stop - one for each letter of the alphabet - and run a 'guess the tune' to raise money.

MHA Communities manager Barbara Harland took on the challenge of losing three stone in weight in three months, raising over £1,000 and inspiring colleagues in her bid for fitness.

IDC Ltd donated to MHA's Loneliness and Isolation appeal to support our work during the peak of the pandemic, MHA's first corporate partnership like this.

While MHA Sunday, one of our biggest fundraising events, was hampered by the closure of churches during spring and

summer, a special online service to mark the day was appreciated. Of particular note was the support for MHA from the Methodist Church, which not only kept us in their prayers but also featured interviews with senior members of MHA in their regular podcasts. In addition, the Methodist Church gave a special grant to enable an intern funded by the Church to remain with MHA for an additional year.

Between March and December of 2020, we raised over £1m from Trusts and Foundations in direct support of MHA Communities during the Covid-19 crisis. This has enabled us to continue providing vital services to our members throughout local communities all over Britain.

Special thanks go to the **National Lottery** who provided total funding to MHA exceeding **£331,000**, the **Heritage Lottery Fund** who contributed **£100,000** and the following Trusts and Foundations for their acts of generosity:

- **Community Foundation Staffordshire £83,471**
- **Cheshire Community Foundation £49,982.76**
- **Nottinghamshire Community Foundation £48,270**
- **Hampshire County Council £46,905**
- **Sir James Reckitt Charity £43,500**
- **Persimmon Charitable Foundation - Community champions £38,000**
- **Sisters of the Holy Cross Charitable Trust £30,000**
- **London Borough of Hillingdon £29,000**
- **Community Foundation, Tyne & Wear and Northumberland £27,000**
- **Community Foundation for Surrey £25,393**



Space unfortunately precludes us from acknowledging separately every one of the over 200 in total trust and foundation donors, but each and every grant, whatever the amount, helped us to continue providing those vital services, enabling older people to live later life well and give them the help and support they needed in these challenging times.

Our Financial Summary

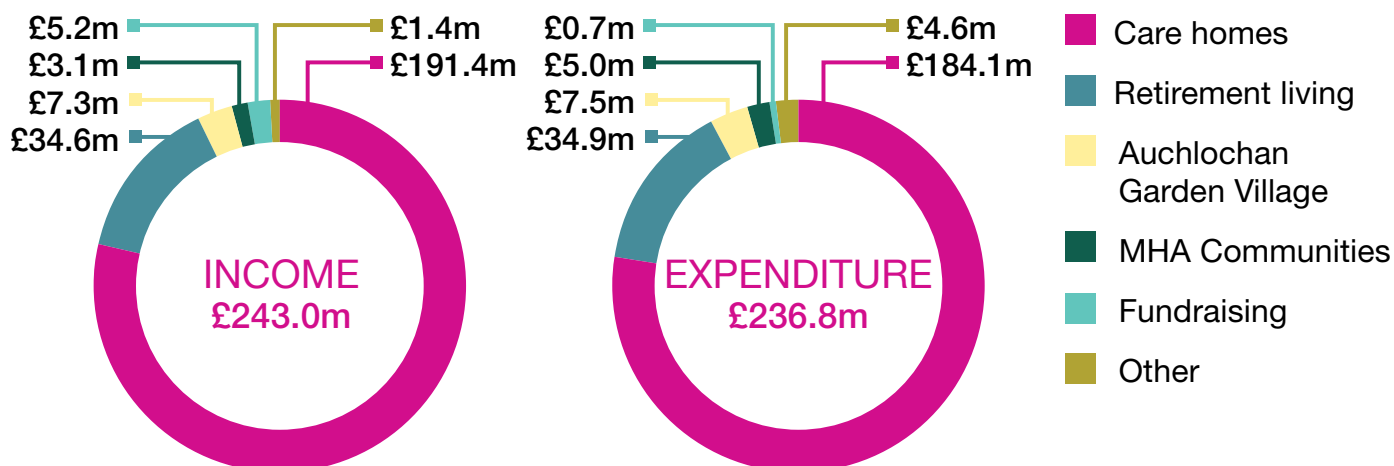
We launched our new five year strategy in 2019 and it is important for the success of this strategy that we continue on a firm financial footing. Although this strategy remains our long term focus we have had to change our immediate focus to deal with the effects that the current pandemic has had on our sector and on our services.

Our Financial Summary covers a period where we were in the grip of the pandemic for most of the financial year. Despite this, due to accessing Government and Local Authority funds made available to support the care sector during the pandemic and a successful year for fundraised income, we made a net income in 2020/21 of £6.2m (2020: £15.0m). We also ended the year

with an improved cash position, largely due to the completion of a number of property sales and the reduction in capital expenditure as we couldn't access our services to carry out the planned work during the lockdowns.

The effects of the current Covid-19 pandemic have forced us to amend our immediate focus to ensure that we can continue to deliver quality services across all our services and the Board is committed to ensuring that we are in the best place to take the charity forward into this next phase when thanks to the successful vaccination programme, we adapt to live safely with the virus.

5 year net surplus split	2016/17 £k	2017/18 £k	2018/19 £k	2019/20 £k	2020/21 £k
Care Homes	11,406	11,267	9,554	12,671	7,712
Retirement living	1,536	8,532	5,063	2,680	-1,223
MHA Communities	-2,265	-2,357	-3,135	-2,649	-1,891
Donations and legacies	5,189	4,350	4,574	3,505	4,542
Other	-3,521	-5,845	-6,241	-1,163	-2,908
Total	12,345	15,947	9,815	15,044	6,232



Consolidated statement of financial activities

Income and expenditure

Income and endowments from	2020/21 £k	2019/20 £k	Variance £k
Donations and legacies	5,214	4,219	995
Charitable activities			
Care homes	196,208	200,853	-4,645
Retirement living	36,431	41,533	-5,102
MHA Communities	3,139	3,266	-127
Other	1,846	1,082	764
Total charitable activities	237,624	246,734	-9,110
Investments	160	285	-125
Total	242,998	251,238	-8,240

Expenditure on:	2020/21 £k	2019/20 £k	Variance £k
Raising funds	672	714	42
Charitable activities			
Care homes	188,496	188,182	-314
Retirement living	37,654	38,853	1,199
MHA Communities	5,030	5,915	885
Other	4,043	1,931	-2112
Total charitable activities	235,223	234,881	-342
Other	916	569	-347
Total	236,811	236,164	-647
Net (losses)/gains on investments	45	-30	75
Net income/(loss) - surplus	6,232	15,044	-8,812

Reconciliation of funds:	2020/21 £k	2019/20 £k	Variance £k
Total funds brought forward	302,528	286,890	15,638
Total funds carried forward	308,289	302,528	5,761

Consolidated statement of financial position

Balance statement

Fixed assets	2020/21 £k	2019/20 £k
Intangible fixed assets & investments	2,254	1,580
Tangible fixed assets	423,435	447,719
Total fixed assets	425,689	449,299
Current assets		
Total	77,893	60,556
Current liabilities		
Total	-39,130	-43,056
Net current (liabilities) / assets		
Total	38,763	17,500
Total assets less current liabilities		
Total	464,452	466,799
Creditors due after more than one year	-114,913	-119,135
Provisions for liabilities	-41,250	-45,136
Total assets before defined benefit pension liability	308,289	302,528
Defined benefit pension liability	0	0
Total assets	308,289	302,528
Capital and reserves		
Total funds	308,289	302,528





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