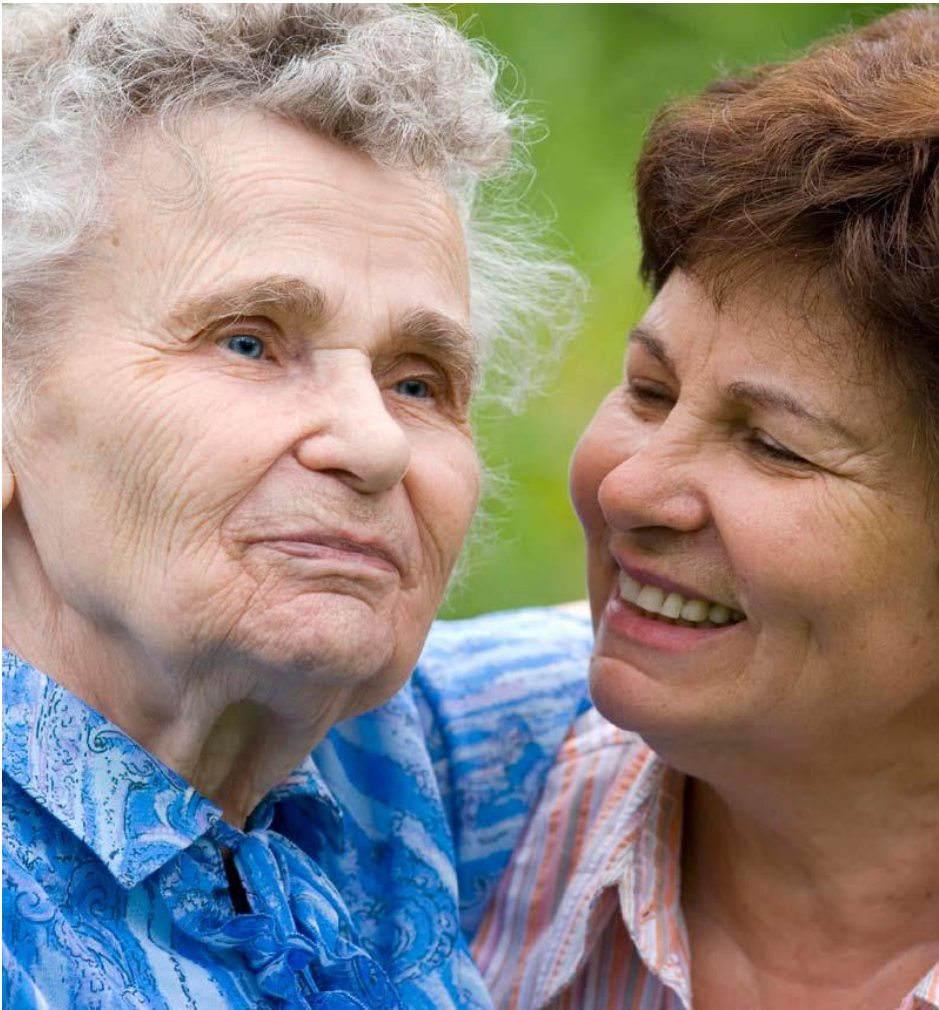




**Annual Report of the Directors/Trustees  
and financial statements for the year  
ending 31 March 2017**



# **Annual Report and Financial Statements 2017**

Action on Elder Abuse  
Registered Address: 23 Mitcham Lane, London SW16 6LQ  
tel: 020 8835 9280 fax: 020 8696 9328  
e-mail: [enquiries@elderabuse.org.uk](mailto:enquiries@elderabuse.org.uk)  
web site: [www.elderabuse.org.uk](http://www.elderabuse.org.uk)

Charity No England and Wales: 1140543  
Charity No Scotland: SC046278  
Company No: 07290092

## **ACTION ON ELDER ABUSE**

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## ***Chief Executive's introduction***

This has been an effective year for the charity.

Firstly, and most importantly, our work with victims of abuse and their families has been strengthened by the developments we have introduced into the helpline with an increased focus on casework and improved training. Since its inception back in 1993 the helpline has provided support to over 90,000 people, all of it specialist in nature. And this work has now been enhanced by our victim recovery service which is methodically rolling out across England, and eventually into the other UK nations too. This meets a huge gap in the support of victims, who too often have been left to cope with the aftermath of abuse and who have too often deteriorated in health and social wellbeing as a result. We can and are changing that.

Secondly, our work with a specialist media organisation (Journalista) has significantly improved our ability to tell the public about the nature of elder abuse, and what needs to change. During the year we reached over 43 million people, a remarkable achievement that saw us launch our campaign for an aggravated offence of elder abuse. Too many abusers get off with light sentencing, which fails to give justice to the victims and which also fails to act as a deterrent. We intend on changing that.

And we strengthened our position in Scotland, Wales and Northern Ireland. Our work is both unique and specialist and the nature of elder abuse needs to be clearly articulated across all four nations of the UK, in a consistent manner. Protection from abuse should be a universal right and should not be dependent on where someone lives. By acknowledging the cultural and historic differences between our nations, while reinforcing the benefits of working together, we are building a strong movement that learns from each other, supports each other, and also respects each other. Challenging elder abuse will always be our primary goal.

As you read this report you will see that we have achieved much during the year, but that we have much still to do. We are an ambitious organisation that is determined to make a difference to the lives of frail, vulnerable older victims of abuse who deserve better than they are currently receiving. The ageist attitudes that accept substandard care, that allow perpetrators to walk free from courts with suspended sentences, and that condemn so many people to lives of suffering must be challenged. And we are intent on continuing to do that as vehemently as possible.

But finally, it is right that I acknowledge the resource that has allowed us to be so effective. The managers and staff, and the dedicated volunteers, who lead us, work with us, and help us. They are the powerhouse that help us make it all happen. And they have a commitment to our cause that is absolutely wonderful. So, my sincere thanks goes to all of them.

**Gary FitzGerald D.Sc (h.c.), M.A.**  
**CEO Action on Elder Abuse**

## ***Chair's introduction***

AEA aims to take action to protect older people from abuse. This report clearly demonstrates how we have done that and I urge you to read it and hence have a fuller understanding of what the Charity does. So many of our key aims have been achieved or dramatic progress in longer term ambitions accomplished.

We are a truly multinational organisation with superb staff and leadership. We demonstrate in the report how much we are now recognised and we know that the media turn to us for informed comment.

But as the report notes we are an ambitious organisation and our only true measure of success is that abuse of older people stops.

It remains a cruel paradox that we have to fight to achieve the protection of older people that in a civilised country should be a given. Cuts to the funding of social care and health have left far more older people at risk. Cuts in the police service have done the same. The lamentable failure of the criminal justice system to deter and to punish perpetrators should not be a matter of debate but action. The incalculable volume of theft from older people should be a scandal but it is met with state indifference and the abuse of Power of Attorney appears to be of no concern. Repeated physical abuse and neglect of older people in residential and domiciliary care gets attention by television investigation but is forgotten in 24 hours. It feels at times as though the main aim of the State is to hide rather than prevent the abuse of so many vulnerable people.

It will not do and AEA will keep campaigning until our existence is no longer needed

**John Beer. OBE., Chair AEA**

# Action on Elder Abuse

Reference and Administrative Details of the Charity, its Directors/Trustees and Advisors

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## Registered Office:

Action on Elder Abuse  
23 Mitcham Lane  
Streatham  
SW16 6LQ

Telephone: 020 8835 9280  
Fax: 020 8696 9328  
Web: [www.elderabuse.org.uk](http://www.elderabuse.org.uk)  
Email: [enquiries@elderabuse.org.uk](mailto:enquiries@elderabuse.org.uk)

Current Directors/Trustees are (with attendance at meetings 2016/17)

Dr John Beer OBE., Chair (5/5)  
Martin Herd, Hon Treasurer (3/5)

Keith M. Lewin (5/5)	Peter Westland CBE (3/5)
Ronnie Barnes (4/5)	Miranda Wixon (4/5)
Stephen James (4/5)	Nicola Hill (4/5)
David Congdon (3/5)	Caroline Cox (4/5)
Lesley McDowell (3/5)	

## New trustees in post:

Denzil Lush (appointed 12 May 2016) (4/5)  
Maria Gray (appointed 8 August 2017)  
John Williams (appointed 12 May 2016) (3/5)  
Glenda Watt (appointed 6 April 2017)

We extend our thanks to the previous Trustees in post during this period, those who retired were:

Lawrence Tudin (resigned 3 July 2016) (2/5)  
Steve Clay (resigned 6 April 2017) (2/5)

The Chief Executive, Gary FitzGerald, is also the Company Secretary

Our Auditor is: Richard Dunford & Co  
Chartered Accountants  
26 High Trees Avenue  
Bournemouth, Dorset, BH8 9JX

Registered Charity No (England and Wales): 1140543  
Registered Charity No (Scotland): SC046278  
Company Registration No: 07290092

# Action on Elder Abuse

## Directors/Trustees' Report

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### **STRUCTURE, GOVERNANCE AND MANAGEMENT**

This is the annual report of the Directors who are Trustees of Action on Elder Abuse (sometimes abbreviated to 'AEA'). It is a charitable company, limited by guarantee, and incorporated as a company on 21st June 2010. The charity was originally established in 1993.

### **INTRODUCTION**

The report and financial statements cover the year ended 31 March 2017. The financial statements have been prepared in accordance with applicable accounting standards, current statutory requirements, the requirements of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK (FRS 102) (effective 1 January 2015) (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charity's memorandum and articles of association.

### **DIRECTOR/TRUSTEE STRUCTURE:**

The Company constitutional document provides for a maximum of twenty Directors/Trustees. It is the intention of the Board of Directors to ensure that there is at least one serving Director/Trustee from each of England, Scotland, Wales and Northern Ireland, with a future target of two trustees from Scotland, Wales and Northern Ireland. For 2017/2018 the Board will be considering revised governance arrangements to better reflect the 'four nations' dimension of our work.

The Board maintains a skills audit of Director/Trustees and uses this to advertise for, or directly recruit, suitable new members. Additionally, the Board appoints advisors, who can attend but not vote at Board meetings. At each Annual General Meeting one-third of the Directors/Trustees (or the number nearest to one-third) retire from office, and may stand for re-election. Each new trustee receives an induction pack that includes all necessary documentation and information, and is supported in their first year by contact with the Board Chair.

The Board meets up to six times per year, and sub-groups additionally meet to address specific issues.

### **STAFF PAY**

The Board reviews the pay of all staff and considers information derived from bodies such as ACEVO, NCVO and published data to benchmark salaries.

# Action on Elder Abuse

## Directors/Trustees' Report

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### **DECISION MAKING**

Responsibility for the management of day-to-day operations is delegated to the Chief Executive. The Directors/Trustees are responsible for deciding the strategic direction of the charity, establishing policy, business planning and ensuring financial stability. The Chief Executive is responsible for ensuring that activities are in keeping with the strategic plan, any legislative requirements, charity policy and the stated objectives of the charity. Within those parameters the Chief Executive takes action as appropriate, and liaises with Directors/Trustees as necessary. This includes financial decisions, media activity, social policy development, and service delivery.

### **RISK MANAGEMENT**

The Board annually reviews the risks to the charity, using an assessment matrix to ensure all key areas are identified, including how the charity may reduce the impact of any identified risks.

### **FUNDRAISING POLICY**

The charity employs a full-time fundraiser who solely undertakes this activity. No professional fundraisers or commercial participators have been used during the year. Currently we have not joined any voluntary regulatory fundraising schemes or standards, although we are exploring these options. We fulfil all of the obligations laid down by the Charity Commission.

Our fundraiser is directly accountable to the Chief Executive who has overall responsibility for approving fundraising activities, in accordance with the strategy agreed by the Trustee Board. Regular reports are supplied to the Board on fundraising, and changes of policy must be approved by the Board before implementation.

No complaints have been received by the charity about its fundraising activities.

The charity does not purchase or sell information in order to pursue fundraising activities, and it has established a robust privacy policy in order to ensure the protection of vulnerable people and others from unreasonable intrusion on their privacy, or undue pressure to give to charitable funds.

### **CHARITABLE OBJECTIVES**

Action on Elder Abuse is a specialist organisation that focuses exclusively on elder abuse. We do not undertake more generic work but instead concentrate on situations where an older person has been or is at risk of being abused by someone



# Action on Elder Abuse

## Directors/Trustees' Report

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they should have been able to trust. The World Health Organisation and other nations have adopted our definition of abuse:

*'Elder abuse is a single or repeated act or lack of appropriate action occurring within any relationship where there is an expectation of trust which causes harm or distress to an older person.'*

Our charitable objectives are to promote the relief of elderly people and prevent elder abuse through raising awareness, education, research and the dissemination of information, and we do this across the United Kingdom. Our Directors/Trustees periodically review our objectives and activities to ensure they continue to reflect our aims. The governing documents of the company are the Memorandum and Articles of Association.

The Directors/Trustees have complied with the duty in section 17 of the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission. In setting objectives and activities, the Directors/Trustees have given careful consideration to the public benefit of the charity's work. AEA is committed to enabling as many vulnerable older people as possible to benefit from our work in preventing and challenging elder abuse. This also benefits other adults who may be at risk of abuse.

### **MISSION STATEMENT**

We are seeking to create an environment in which the abuse of older people is no longer tolerated, by increasing public and practitioner awareness about the nature and extent of elder abuse and by facilitating the development of policies, procedures and cultures that challenge such abuse.

### **ACTIVITIES, ACHIEVEMENTS AND PERFORMANCE**

#### **ACTIVITIES**

To achieve our objectives, we combine publicity, with the provision of information, and with practical help for older people, their families and friends, care providers and Government/other statutory bodies and people with an interest in the issues concerning the abuse of older people. This allows us to influence the environment in which abuse may occur, and to also provide practical intervention to support victims. All of our activities are aligned with our objectives.

This work includes:

- a unique, dedicated helpline that is increasingly in demand. There is nothing of its type anywhere else in the UK;



# Action on Elder Abuse

## Directors/Trustees' Report

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- the development of Recovery Services (EARS) to assist victims of elder abuse;
- the provision of a website, with social media activity. The website is the most 'popular' in both google and yahoo, in terms of elder abuse;
- work with the media, writing articles, assisting 'undercover' work, and commenting upon abuse cases;
- providing bespoke training, conferences, and seminars. These services are unique, with our conferences highly valued and always fully booked;
- supporting our members, and undertaking project work and social policy activity. Our activities have resulted in a major focus by Governments on adult safeguarding; and
- providing a periodic newsletter, Action Points, to all members and to interested persons and bodies whose work can assist the aims and objectives of the charity.

We are supported by volunteers in the provision of our helpline and recovery services, and within our office activities. Volunteers provide a unique role and are often able to relate directly to the experiences of older victims and provide an 'acceptability' of our services because of the similar ages and backgrounds of volunteers and victims.

Without our activities and the work of AEA, the voice of vulnerable older people would not be heard and the progress made in terms of regulation and adult safeguarding would not have been achieved. We are providing people with practical advice and support at a time in their lives when they are particularly vulnerable, and we are improving the understanding of society about the nature of elder abuse and what needs to be done to challenge it. Our work makes a real difference.

### **Income Generation:**

The financial situation facing many charities of our size continues to be challenging but the five-year funding from the Big Lottery, coupled to the appointment of a very effective Fundraising Manager, has assisted us in achieving many of our goals and in widening our effectiveness and reach in relation to income generation. We still have much to do, particularly to build resilience into our finances to cope with the ending of Lottery funding in 2020 - we are making steady progress.

For 2016/17 we said we would:

- continue to develop our work around improving the marketing of our products and services;
- continue to pursue the diversification of our income streams in order to reduce any over-dependence on any single stream;
- seek to expand the range of funding available to our nations work and two

# Action on Elder Abuse

## Directors/Trustees' Report

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**primary services (helpline and the Elder Abuse Recovery Service – EARS).**

During the year, we explored a range of marketing options, including appointing specialist staff for these activities, but we have yet to find the right balance to achieve the outcomes that we want. This remains a major priority for us as we know that our products and services are of high quality and should reach a wider market, despite the challenges of the current market.

We have expanded our income streams, particularly in relation to community fundraising, and we have had some good success in this regard. We will continue to pursue this diversification and plan to develop a new fundraising strategy, together with a marketing strategy for the coming years.

Our expansion into the four nations has opened up new potential funding opportunities, for our services and the charity as a whole, and we are firmly establishing ourselves in each of the nations in order to influence the experiences of abuse victims. This should additionally enable us to seek more local funding, and we have seen some successes in this regard during the year.

*We considered that we had been partially successful with regard to the goals we had set for this year. We still need to do more work on marketing, although we have made good progress on new fundraising streams and we are now well-established in the nations.*

### **For this coming year:**

- **we will further develop our website in order to increase the potential for marketing and sales**
- **we will update our fundraising policy, and write a marketing policy**
- **we will continue to invest in a four nations approach, with the expectation that this will benefit older people who are abuse victims and to increase the potential for local funding.**

### **WEBSITE/SOCIAL MEDIA**

The website is used as a means of providing up to date news on adult safeguarding and elder abuse, and for providing general guidance and information on the subject. Pages give information on the charity's services, downloads of all key documentation relating to safeguarding, conference presentations, details of current relevant news events, and information on the nature of elder abuse. It is often the first point of call for the public, journalists, and academics, and is the primary elder abuse web site identified by both Google and Yahoo search engines.

# Action on Elder Abuse

## Directors/Trustees' Report

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Facebook and Twitter are used to keep people informed of abuse issues, stimulate discussion and debate, and to focus attention on areas that need improvement.

*For the year 2016/17 we said we would*

- *develop a social media strategy that integrates our activities and establishes unified objectives in terms of consistent messaging and information across all platforms;*
- *continue to re-design and develop our website throughout the year to make it more responsive and easier to use.*

During the year, we established a commercial arrangement with the media company, Journalista, part of which involved evaluating our social media activity and then developing a strategy to ensure we had consistency across those platforms and our website. The strategy is currently being implemented.

By the end of the year we had an average Facebook post reach of 21,959 (19,946: 2015/16) and 2,941 Twitter followers (2,300: 2015/16) with an average Twitter reach of 117,000 people.

During the year, we continued to refine and develop the website but remained unhappy with some aspects that did not deliver the functionality that we wanted. We therefore committed to looking again in the new year at other options. During the year, the website had 164,127 page views (131,820: 2015/16) from 46,000 users (38,735: 2015/16).

*We assessed this as successful as we had achieved our key targets in this area.*

**For this coming year:**

- **we will continue and complete the implementation of the social media strategy**
- **we will investigate further re-development of the website**

### **MEDIA WORK**

Getting our message across in newspapers and on broadcast media is integral to our overall strategy, both to raise awareness of elder abuse and to ensure that as many people as possible know we are here and available to help them. It is also a significant method by which we seek to influence social policy as politicians and policy makers can be sensitive to the information promoted by the media. Throughout the year, we continued to be quoted in newspapers across the four nations, and magazines, and we gave interviews to a range of both radio and TV programmes.

# Action on Elder Abuse

## Directors/Trustees' Report

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For the year 2016/17 we said we would

- explore the various options for achieving our external communications objectives and look at how they may be achieved differently;
- continue to develop our communications strategy, and also develop a separate social media strategy;
- set clear goals and measurements for media activity so that we can understand and assess levels of success.

We looked at our communication needs during the year and decided to contract with an external company, Journalista, to help us improve our media presence. As part of that arrangement Journalista has developed both a communications strategy and one for social media, which included goals and measurements.

During the period in which we engaged Journalista (August to March 2017) our media reach exceeded 43 million people. Our key message (Abuse of older people in the UK is a nationwide problem) was carried in 242 out of 320 articles.

Key national outlets which carried AEA coverage over this period included BBC Panorama; BBC Victoria Derbyshire Programme; Daily Mail; Observer; The Times; Daily Express.

Successful campaigns included: Data-led campaign on conviction rates disparity between elder abuse and hate crimes, Care home evictions and visiting rights, Launch of the AEA Scotland helpline, Financial abuse in Northern Ireland, and the Campaign on financial abuse with Police and Crime Commissioners across England.

*We assessed this as successful as we had achieved our key targets in this area.*

**For this coming year:**

- **we will continue our relationship with Journalista;**
- **we will update our communications strategy to take account of any changes arising from what we did this year.**

### **TRAINING and SEMINARS**

We provide a range of training products and services, including DVD's on general elder abuse awareness (hosted by Sir Tony Robinson who is one of our patrons), a DVD called 'Consequences' focused on domiciliary care, a fifteen-minute film about financial abuse, and a DVD and information booklet for people who are considering directly employing a Personal Assistant.

# Action on Elder Abuse

## Directors/Trustees' Report

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We also provide seminars on specific subjects (e.g. financial abuse), and training on elder abuse and adult safeguarding, but all of these are currently only provided in England.

For 2016/17 we said we would:

- continue to provide the full range of products and training that is currently available;
- focus on the development of our marketing systems, with a view to ensuring that they are based on good promotional practices.

During the year, we explored a range of marketing options with our new Marketing post in order to promote our products and services. However, we were unable to find a model that successfully worked for the charity and deleted this post at the end of the year. Despite our best efforts, we had not identified a successful strategy and we consequently decided to re-think this proposed course of action.

We also acknowledged that some of our activities (e.g. conferences) were less of an income stream and more of an influencing tool. Consequently, we adjusted costings to reflect this financial reality. Overall, our products, conferences, seminars and training generated over £16,000, which was an improvement on the previous year's figure of £11,000

*We judged this to be partially successful in that, while we had maintained a good position in the market, we had not achieved the outcome we wanted and had consequently re-evaluated the situation.*

**For this coming year**

- **We will continue to provide the full range of products and training that is currently available;**
- **explore ways of improving the sales modules on our website;**
- **develop a marketing strategy for the organisation**

## **MEMBERSHIP**

Through our membership scheme we offer practitioners, voluntary groups and the public the opportunity to become part of a like-minded network working to eliminate elder abuse. Members receive our bulletin, Action Points, containing the latest information on policy, legislation and research relevant to the prevention of elder abuse. They are also entitled to receive discounts on our conferences. Most importantly they indicate their support for what we do and contribute an amount to the charity's income.

# Action on Elder Abuse

## Directors/Trustees' Report

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The benefits for members are significant. By providing them with the Action Points bulletin we can keep them up to date on the very latest thinking around Best Practice and adult protection and we can expose them to different ideas and approaches, and this is equally true for our conferences where they pay a reduced fee to attend. Members also have the opportunity to pose questions on safeguarding topics that can be put to the wider experienced membership for consideration and response. Members also feed into our policy work, helping us shape our responses to Government consultations and also to formulate our strategies in terms of lobbying etc.

**For 2016/17 we said we would:**

- develop specific email news bulletins for Wales and Northern Ireland;
- Use conferences in the nations to promote membership of the charity;
- Undertake a survey of members to ascertain their interests and how we might best interact with them.

During the year, we completed all of the tasks that we had set, with news bulletins established for Scotland, Wales and Northern Ireland, and conferences used to promote the charity and its services. An initial membership survey helped us develop the UK wide newsletter.

*We assessed this as successful as we had achieved our key targets in this area.*

**For this coming year:**

- **we will continue to provide the Action Points newsletter**
- **undertake a second survey after twelve months to ensure we continue to be responsive to member needs**

## **CAMPAIGNS**

During the year, the charity launched its campaign to make 'elder abuse' an aggravated offence, with a keynote address at our June 2016 conference by the Deputy District Attorney for San Diego explaining the positive impact that such an offence has on his work.

Despite academic research suggesting that 8.6% people aged 65 or over experience some form of abuse each year – ranging from neglect and fraud to physical and sexual assaults – an analysis of crime figures by Action on Elder Abuse found that the number of successful criminal convictions in 2015/16 (3,012) represents just 0.7% of total prevalence. Making elder abuse an aggravated offence would help to address this.

# Action on Elder Abuse

## Directors/Trustees' Report

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- **It would enable tougher sentencing:** Judges would be discouraged from giving community service or suspended sentences for these dreadful crimes and would instead be empowered to issue real prison sentences which would act as both a punishment and a deterrent
- **It would take into account the impact of these crimes:** Crimes against older people often have a significant detrimental impact. For example even a so-called 'minor' crime against an older person can act as a catalyst for a process of deterioration that can ultimately lead to their death. Soft sentencing can exacerbate that.
- **It would highlight the pre-meditated nature of these crimes:** Making elder abuse an aggravated offence would highlight the fact that older people are being specifically targeted by criminals.

In February 2017, we conducted a poll of more than 3,000 (3,183) people to assess attitudes towards making elder abuse a hate crime. We found that nearly 95% of Britons agree that the abuse of older people should be an aggravated offence like hate crimes based on race, religion or disability. We are pursuing this campaign in the media and with politicians.

### Our priorities:

Following the failure of the Westminster Government in 2014 to enact legislation to provide legal powers to intervene and protect adults at risk of abuse, the situation across the UK became starkly different. In Scotland, there has been comprehensive legislation since 2007 – the Adult Support and Protection Act – which covered systems, process as well as laws to intervene. This remains aspirational for the other nations. At the same time as England brought forward the Care Act, Wales introduced the Social Services and Wellbeing Act, which again went further in providing legislation to protect adults. Northern Ireland is still working through the development of policy, although the Commissioner for Older People has called for legislation. All of which means that the level of protection afforded to adults at risk of abuse is very dependent upon where people live in the UK.

For this reason, our ability to extend our active reach across all four nations has proved hugely valuable. Not only has it allowed us to have a firm understanding of the political and policy details and difference between each of our nations on adult protection, and care/health provision, but it has also allowed us to begin influencing matters from a position of local credibility.

### For 2016/17 we said we would:

- identify one key abuse theme (financial abuse) that is consistent across the four nations and undertake analysis as a means of highlighting the key issues;



# Action on Elder Abuse

## Directors/Trustees' Report

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- hold a conference in each of the four nations;
- produce a discussion paper on the agreed theme, based on the experiences of the four nations;
- co-ordinate a UK discussion on that theme in order to develop practice guidance;
- launch at least one main campaign that is relevant to all four nations;
- appoint a Director for England to complete our senior management team.

During the year, our four Directors worked collectively on a range of activities to share knowledge and information and better understand similarities and differences. A draft paper is under development on financial abuse, to be consulted upon during the following year; first conferences were established in Wales, Scotland and Northern Ireland, and we undertook a major conference in England to launch our campaign for an aggravated offence of elder abuse. And, we were pleased to have appointed our Director for England.

*We assessed this as successful as we had achieved our key targets in this area.*

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**From this year onward we are able to report our activities by each of the four nations that make up the United Kingdom.**

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# Action on Elder Abuse

## Directors/Trustees' Report

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### **Our work in England:**

During 2016/17, we successfully introduced a specific English directorate, mirroring those already established in Scotland, Wales and Northern Ireland. A Director of England, Stephen McCarthy, joined Action on Elder Abuse in June 2016.

Of course, this was not the beginning of our work in England – that has been happening since the inception of the charity and had been overseen by the CEO until then.

Our initial focus this year has been on further development of the helpline and supporting the introduction of its arms in the other nations. However, there has also been considerable time spent on policy work specific to England, as well as continuing UK-wide work in collaboration with the other nation directorates.

**Stephen McCarthy**  
**Director**  
**Action on Elder Abuse England.**

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### **Public Policy**

We engaged with numerous statutory and other bodies over the course of the year. We responded to a number of consultations including the Law Commissions review of Wills. We also made a submission to a Home Office consultation ostensibly about child abuse and neglect, but that actually asked if any proposed introduction of mandatory reporting should be extended to vulnerable adults – something that AEA is actively seeking.

We also engaged regularly with the Care Quality Commission (CQC) as the key regulator and watchdog for the social care and healthcare sectors throughout the year. A key result during the year was applying pressure for CQC to address the issue of visitors, primarily family members, being barred from visiting their loved-ones living in residential homes as a consequence of them having raising concerns or making complaints about care. This was a theme identified through calls to our helpline. Consequently, CQC issued new guidance for both the public and social care providers. We will continue to monitor the effectiveness of this action.

In the second half of the year we joined the Home Office's new Older People Advisory Group, set up specifically to look at addressing the issue of elder abuse. It has been an opportunity to push our Criminalisation campaign. That work is ongoing but it is hoped it will bear fruit in the next year.

# Action on Elder Abuse

## Directors/Trustees' Report

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We convened the Adult Safeguarding Alliance, a group of third sector organisations concerned with the safeguarding of vulnerable adults, including AEA, Mencap, National Autistic Society, Sense, and Jewish Care. The Alliance will continue electronically, seeking opportunities for joint public policy work.

### **For 2017/18 we will:**

- **Continue to seek and use opportunities to influence public policy as it relates to safeguarding and protecting older people**
- **Continue to engage relevant partnerships and networks to influence the adult safeguarding and protection agenda**

### **Awareness Raising**

Public perception is critical to elder abuse, primarily because there is a lack of understanding about the causes and extent of elder abuse, which in turn has an influence on how statutory agencies address the issue. This is particularly the case with the criminal justice system, where AEA research indicates that no more than 0.7% of abuse cases actually lead to prosecutions.

### **For 2016/17 we said we would:**

- **Identify one key abuse theme that is consistent across the four nations and undertake analysis as a means of highlighting the key issues**
- **Co-ordinate a UK discussion on that theme in order to develop practice guidance**
- **Launch at least one main campaign that is relevant to all four nations**

We launched our campaign seeking the criminalisation of elder abuse across the UK. This campaign is ongoing with the initial drive having been seeking public awareness and support. We have enjoyed good media coverage in England and have shoe-horned the campaign into nearly every appearance. A public petition to the Home Office is ongoing on the internet at Change.org.

The issue of financial abuse of older people was identified as a key theme for focus and work began across the four nations to create a discussion paper to share with professionals in the UK. This work will be carried over into next year.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Progress the UK-wide practitioners guidance on financial abuse**
- **Progress the campaign to criminalise elder abuse with a focus on**

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### **buy-in from politicians**

- **Identify an England-specific campaign to pursue in the second half of the year and beyond**

### **Helpline**

Elder Abuse Response is the only helpline operating in the UK that is dedicated exclusively to the issue of elder abuse. It gives emotional support, information and guidance to older people and anyone concerned about abusive and potentially abusive experiences. It also takes action to help callers who cannot get justice without support. The nature of many calls is increasingly complex, and in a number of cases our Helpline Operators are undertaking levels of casework to help ensure victims received the support to which they are often entitled

By the end of March 2017, 10,081 calls were made to the helpline, which was broadly consistent with the previous year's figure of 10,534. We are continuing to encourage people to seek information from our website as a 'first point of contact' in order to ensure that helpline callers are in need of more in-depth support are identified so that additional support can be offered.

### **For 2016/17 we said we would:**

- **Develop new training and guidance materials to reflect the national differences in each of the four countries and train current staff and volunteers accordingly**
- **Continue to reduce the reliance on the helpline for the provision of routine information, and increase our involvement in more complex cases through the casework approach**

The Director for England delivered a review of the AEA helpline which supported an independent analysis from the previous year. The need for an electronic Customer Relationship Management system (CRM) was identified as essential, along with an electronic knowledge resource for use by helpline staff and volunteers. A cost-efficient CRM to suit our needs was identified and procured. Our delivery partner, Bluedoor Software, set about adapting an off-the-shelf package to match our requirements in the latter part of the year, and ahead of anticipated launch early in 2017/18.

The helpline was operated exclusively from England at that stage and so the directors of the three other nations compiled in-depth training and guidance materials for the staff and volunteers to invest them with nation-specific variables in legislation etc.

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The helpline met its target of providing casework to 10% of callers with our definition of casework being repeated interactions with a caller and/or making referrals for support on behalf of callers. There was also a promotional campaign of the helpline targeting health providers.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Integrate the new helplines in Wales, Scotland and Northern Ireland into the overall helpline set up.**
- **Launch the CRM for use across all four nations.**
- **Develop and populate the knowledge base component.**

### **Elder Abuse Recovery Service**

This developed from a Comic Relief project intended to establish a support network for people who had experienced abuse, and/or their relatives, and/or friends. The objective of the scheme was to enable survivors to achieve full recovery from the effects of their abuse and put the trauma behind them. We additionally previously received funding from the Department of Health to further refine the concept. Overall, we spent seven years testing and developing effective models of support.

The Elder Abuse Recovery Service (EARS) has continued to develop in the last 12 months with clients having now been supported within two areas (three London boroughs, and Sussex).

### **For 2016/17 we said we would:**

- **Appoint a second Local Coordinator, and develop and deliver the new service in Sussex;**
- **Plan and develop a third service in a second County in proximity to London;**

During the year, we appointed a Volunteer Coordinator covering Brighton, Hove and East Sussex. Essex was the third area of choice and work continues in the area to raise the profile with volunteers actively promoting the service through talks, attendance at events and contacts with local and wider services.

The development of each service needs to be carefully considered and progressed at such a pace that ensures balance for both the client and the volunteer; we want to ensure that the service remains sustainable. As we continue to expand, it is hoped that the length of time spent developing each area will steadily decrease overtime.

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By 31<sup>st</sup> March 2017 we had engaged with 43 people, 25 of whom had completed the process, and 18 were still being progressing through the EARS programme. The number of support sessions required by an average victim to complete the programme is 38, with most being between 1 and 2 hours long. We have calculated that around 70 contact session hours are needed to achieve independence and recovery. Face to face sessions are enhanced with telephone contact between appointments in order to arrange visits and follow up on questions or queries raised previously, these help victims feel they are being supported continuously, and help make them feel wanted and special.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Plan and develop the service in two other areas; one in the south and one in the north;**
- **Make plans and begin to develop the service in one of the other nations**

## **Media**

As mentioned earlier in this Report AEA contracted with the PR and communications agency Journalista this year. Journalista has helped us boost our public and media profile considerably, particularly around our criminalisation campaign and it has ensured a lot of media appearances for our spokespeople.

The Director of England has carried out a wide range of national and regional interviews in print, on radio and on television, including the Times, BBC and Sky News. These interviews enabled AEA to push the criminalisation campaign as well as providing timely reactions to specific 'breaking news' stories of abuse of older people.

### **For 2017/18 we will:**

- **Continue to work with Journalista within the UK wide media strategy including public polling and its dissemination around our criminalisation campaign.**

## **Conferences**

Conferences are an important way in which we highlight areas of concern or draw attention to good practice, and influence the perception of practitioners and others with regard to elder abuse. AEA has a strong track record of hosting these events, and they have traditionally been a strong source of income. More recently however

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these events have been seen as primarily influencing tools.

### **For 2016/17 we said we would:**

- Hold four conferences, one in each nation of the UK

We held our National Conference in England on 16<sup>th</sup> June 2016, World Elder Abuse Awareness Day, which was attended by over 100 delegates. The feedback was uniformly positive. We also held conferences in each of the other nations.

The day consisted of a wide array of plenary presentations include those delivered by Gary Fitzgerald, our CEO; Paul Greenwood, Deputy District Attorney of the County of San Diego; Margaret Flynn, Chair of the National Independent Safeguarding Board in Wales; and Katy Bourne, Sussex Police and Crime Commissioner. There were also a number of workshops covering issues such as the use of hidden cameras to detect abuse, safeguarding, slavery and coercive control.

We used the conference to launch our new campaign to introduce a new aggravated criminal offence of elder abuse.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- Deliver an annual national safeguarding conference in England.



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### **Our work in Scotland:**

While AEA's first year in Scotland mainly focused on setting up the charity's operation in Scotland and making ourselves known to key individuals and bodies, our second year has seen huge developmental strides. With the support of our new Services Coordinator, we've been able to consolidate the awareness of AEA in Scotland and to increase our reach and overachieved many of our targets.

Our most significant development was the launch of a dedicated Helpline for callers concerned about issues arising in Scotland; it is operated by a team of 5 passionate volunteers and staff. While this is a critical service for many victims of elder abuse, we wanted to go further by additionally offering peer support in Scotland, and we have therefore carried out significant development work (and we have secured part funding) to establish the project in Scotland.

We held our first national conference, and generated widespread media coverage of the issue of elder abuse throughout the year. To provide information and guidance to elder abuse victims, we produced three new information booklets and we have engaged in casework with some of the callers to the Helpline.

There is much yet to do in Scotland, particularly in terms of assessing the current policy and legislative environment, but AEA Scotland has now firmly placed itself as a 'key player' in this agenda, and we are determined to keep pushing until we can deliver the best possible outcomes for elder abuse victims across Scotland.

**Lesley Carcary,  
Director,  
Action on Elder Abuse Scotland**

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### **Our Priorities**

Public perception is critical to elder abuse, primarily because there is a lack of understanding about the causes and extent of elder abuse, which in turn has an influence on how statutory agencies address the issue. This is particularly the case with the criminal justice system, where AEA research indicates that no more than 0.7% of abuse cases actually lead to prosecutions.

For 2016/17 we said we would:

- Identify one key abuse theme (financial abuse) that is consistent across the four nations and undertake analysis as a means of highlighting the key issues

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- Hold a conference in each of the four nations
- Produce a discussion paper on the agreed theme, and co-ordinate a UK discussion on that theme in order to develop practice guidance
- Launch at least one main campaign that is relevant to all four nations

Financial abuse was a key theme for us during this period, and the focus of our first national conference in June: 'Financially safe & secure?'. This generated significant interest in our work, and renewed focus on financial abuse as a key issue for many sectors across Scotland. We utilised the conference as an opportunity to coordinate a national debate on the issue, and engaged in follow-up work with a number of groups. We also produced a booklet to help older people protect themselves from financial abuse which was distributed at the conference. We additionally worked with the other nations to develop a position paper on financial abuse.

We also took part in AEA's campaign to criminalise elder abuse, ensuring the campaign was tailored to Scotland's unique legislative framework.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Commence UK-wide financial abuse project to identify trends, share good practice between the nation & produce a series of recommendations.**
- **Hold a second national conference on a key elder abuse issue**
- **Seek funding to set up the first EARS project in Scotland.**
- **Take forward one new campaign which is relevant to all 4 nations.**

### **Helpline**

Elder Abuse Response is the only helpline operating in the UK that is dedicated exclusively to the issue of elder abuse. It gives emotional support, information and guidance to older people and anyone concerned about abusive and potentially abusive experiences. It also takes action to help callers who cannot get justice without support.

### **For 2016/17 we said we would:**

- Develop new training and guidance materials to reflect the national differences between the four nations and to train current staff and volunteers accordingly
- Actively recruit helpline volunteers in each of the nations to take helpline calls

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One of our most significant achievements was the launch of the Scottish Elder Abuse Helpline. We created our own bespoke training programme and support materials, and carried out significant promotional work to allow us to launch the Helpline in November. We recruited 5 volunteers and a new staff member to allow us to answer all Scottish calls in Scotland, Monday to Friday, 9am to 5pm.

We developed our own data recording processes to capture detailed information on calls, created a Scottish version of the Helpline policy, and engaged in casework with a small number of callers. We also created a portfolio of new leaflets and posters to promote the Scottish Helpline, articles for other agencies, and outreach work to promote the Helpline across Scotland. We receive around 20 calls per month, compared to around 3-4 calls per month prior to the launch of the Scottish Helpline.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Continue promotional work to increase calls to the Scottish Helpline**
- **Further develop our management, monitoring & evaluation processes**
- **Recruit and support new volunteers**
- **Further develop casework and media case studies from the Helpline**

### **Income Generation**

One of the potential advantages of having an established base in Scotland is that the charity is potentially more attractive to Scottish funding organisations. This is possibly a long-term strategy as we are still comparatively new to the nation and we are competing with many other Scottish organisations for a finite resource, money.

### **For 2016/17 we said we would:**

- **Continue to develop work around marketing of our products and services**
- **Seek to expand the range of funding available to our nations work and two primary services (helpline and the Elder Abuse Recovery Service – EARS)**

Our fundraising priorities this year were to secure funding to set up the first EARS project in Scotland, as well as ongoing funding for the Scottish Helpline. We received the full funding we needed for the Scottish Helpline, and were awarded a grant towards the EARS project. As this grant was conditional upon securing the balance of funding, we submitted funding applications to a range of trusts, foundations, individuals and companies. We also supported the Fundraising Manager

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with applications to various other trusts and foundations.

*We assessed this as partially successful as we had achieved our key targets in this area, but needed to achieve further funding to consolidate our gains.*

### **For 2017/18 we will:**

- **Seek funding towards our next national conference via sponsorship, exhibitor fees and partnerships with other agencies**
- **Seek funding to set up the first EARS project in Scotland.**
- **Continue to develop and diversify fundraising activities**

### **Website, social media and information materials**

The website is used as a means of providing up to date news on adult safeguarding and elder abuse, and for providing general guidance and information on the subject. Pages give information on the charity's services, downloads of all key documentation relating to safeguarding, conference presentations, details of current relevant news events, and information on the nature of elder abuse. It is often the first point of call for the public, journalists, and academics, and is the primary elder abuse website identified by both Google and Yahoo search engines.

### **For 2016/17 we said we would:**

- **Continue to re-design and develop our website**
- **Explore the various options for achieving our external communications objectives**

Our re-development of the website included new pages for each nation, and a Scottish section was created. We are continuing to refine the website however as we are not satisfied that it meets our requirements.

We produced a range of useful information for both victims of elder abuse, and practitioners. This included uploading our information booklets to the website, producing 3 new booklets (financial abuse, spotting the signs of elder abuse, and supported decision-making), daily social media activity, and producing four Scottish newsletters. Our newsletter subscribers and social media followers continue to grow, and we have regular requests for our leaflets and booklets. We also recruited a social media volunteer and created a social media policy for volunteers.

Our overall Communications strategy allowed us to look in-depth at the needs of each nation and how we could develop strategies that met the differing priorities and environments of each nation.

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*We assessed this as successful as we had achieved our key targets in this area.*

## **For 2017-18 we will:**

- **Continue to expand our suite of information materials for older people re various aspects of elder abuse and how to access support**
- **Continue to produce professional information to for practitioners via our newsletter, website blogs and policy briefings**
- **Create new content for the Scottish pages of the new website.**

## **Media Work**

Getting our message across in newspapers and on broadcast media is integral to our overall strategy, both to raise awareness of elder abuse and to ensure as many people as possible know we are here to help. It is also a significant method by which we seek to influence social policy as politicians and policy makers can be sensitive to the information promoted by the media. Throughout the year we continued to be quoted in newspapers across the four nations, and magazines, and we gave interviews to a range of both radio and TV programmes.

## **For 2016/17 we said we would:**

- **Explore the various options for achieving our external communications objectives and look at how they may be achieved differently**
- **Continue to develop our communications strategy, and a social media strategy**
- **Set clear goals and measurements for media activity so that we can understand and assess levels of success.**

The overall communications and social media strategy included dedicated sections for each nation, including an analysis of the situation in Scotland.

We experienced a significant increase in media activity over the year, including quotes, full page features and blogs in a range of national and local newspapers, magazines and newsletters. We also took part in various radio interviews, and a dedicated feature on prime-time evening news on BBC Scotland. We also attended media training, and contributed to the UK-wide communications strategy. It was this strategy that helped us address the goals in this section.

*We assessed this as successful as we had achieved our key targets in this area.*

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### **For 2017/18 we will:**

- **Continue to engage in both reactive media work in response to breaking stories, and proactively planning ahead to generate our own news**
- **Create a calendar of awareness days to link with regional themes/activities**
- **Identify callers suitable for media case studies**

### **Conferences and events**

Conferences are an important way in which we highlight areas of concern or of good practice, and influence the perception of practitioners and others with regard to elder abuse. AEA has a strong track record of hosting these events, and they have traditionally been a strong source of income. More recently however they have been seen by us as primarily an influencing tool.

### **For 2016/17 we said we would:**

- **Hold four conferences, one in each nation of the UK**
- **Look at the delegate fee for conferences to ensure that it strikes the right balance between income generation and policy influencing.**

We held our first national conference which was attended by 111 people from across Scotland. We received excellent feedback, and the event was very successful in terms of raising awareness of AEA Scotland and elder abuse, significant interest in our work, and delegates' willingness to engage with us in the future.

We set the delegate fee based on the circumstances in Scotland, set against a background in which previous adult safeguarding conferences have been free events.

We also held a successful launch event for the Scottish Helpline in November 2016. This generated significant media interest of newspapers, radio and TV, and AEA Scotland received excellent feedback from those who attended the event (around 70).

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Deliver a second national conference, and consider the option of a partnership with another agency**
- **Host an event to mark WEAAD, with the aim of increasing**

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### **awareness of elder abuse, our work, and developing relationships with policy-makers**

#### **Development Work: Elder Abuse Recovery Service**

This developed from a Comic Relief project intended to establish a support network for people, or their relatives or friends, who had experienced abuse. The objective of the scheme was to enable survivors to achieve full recovery from the effects of their abuse and put the trauma behind them. We additionally previously received funding from the Department of Health in England to further refine the concept. Overall, we spent seven years testing and developing effective models of support.

**For 2016/17 we said we would:**

- **Look for options to begin developing the service in at least one Celtic nation.**

We carried out extensive work to develop an EARS model for Scotland. We produced a comprehensive development strategy, scoped demand, and set up a partnership with the local authority in which we plan to set up the first project (Fife). We've received part funding towards the Fife project, and submitted various other bids to secure the balance of funding.

We also recruited new members to our well-established advisory group (we now have 10 members), one of whom has become AEA's second Trustee from Scotland.

*We assessed this as successful as we had achieved our key targets in this area.*

**For 2017/18 we will:**

- **Try to secure the balance of funding to set up the first EARS project in Scotland, and if successful, begin work to commence the project**
- **Recruit one more member to our advisory group**

#### **Policy Work**

We responded to a number of consultations and calls for evidence, and regularly contributed to a range of national policy groups and forums. We also met with a number of MPs, MSPs and local councilors as a means of raising awareness of elder abuse, garnering support for our work and supporting local constituents. We also engaged in ongoing promotion of our criminalisation campaign in a Scottish context, and sent a series of Freedom of Information requests to Police Scotland and COPFS to gather information on prosecution rates, investigations and referrals.



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## **For 2017/18 we will:**

- **Continue to develop a sound evidence base for our policy work, including Helpline data and FOI requests**
- **Continue to influence the development of policy and practice via consultation responses, evidence to inquiries and developing effective relationships with policy makers**
- **Take forward one new campaign which is relevant to all four nations.**

## **Acknowledgements**

Our volunteers, our advisory group and Trustees, Big Lottery, Gloag Foundation FMC Technologies who have each contributed to our progress and schemes in Scotland and to whom we extend our grateful thanks.

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### **Our work in Wales:**

Our first year operating as AEA Cymru involved establishing the charity within Wales, raising the profile of elder abuse and building relationships locally. This second year we have been able to build on that foundation, strengthening relationships with third sector organisations, Welsh Government and the Older People's Commissioner's office. Our successful conference helped raise awareness specifically around financial abuse and led to invitations to contribute to further work on this issue. We provided information and advice directly to older people by producing a financial abuse information booklet as well as one covering all forms of abuse more generally. The recruitment of the Services Coordinator enabled us to progress the establishment of a bilingual helpline in Wales which will be launched in 2017-2018. An important aspect of developing the charity in Wales took part this year in the establishment of a small steering group and this will be built upon in the next year.

Wales is fortunate to have projects focusing on domestic abuse of older people as well as a vocal Older People's Commissioner who had raised the issue of abuse of older people prior to our inception. Finding our place amongst this has taken some time but this year we have continued to raise awareness of elder abuse and the charity within local sectors, government and statutory agencies. This will be built upon next year with involvement in National Safeguarding week.

There is still much to do to ensure that every older person is able to recognise abuse, that they know it is not something that they should be experiencing, no matter who the perpetrator is, that they know the reporting mechanisms and that they know that we are there to support them. Action on Elder Abuse Cymru will continue to work to keep elder abuse on the safeguarding agenda and in the public awareness to ensure that a zero-tolerance environment is established in Wales.

**Rachael Nicholson-Wright**  
**Director,**  
**Action on Elder Abuse Cymru**

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### **Public Policy**

Positioning AEA Cymru as the go-to charity for policy makers and others in Wales has progressed in the year under review. Following work with the Welsh Government's equality and prosperity division we were invited to present to the Welsh Government Hate Crime Criminal Justice Board. We were also invited to attend a tender information session which resulted in Victim Support asking us to join with them and other partners on their tender to undertake the Welsh Government's hate crime reporting centre work. The bid was successful and we will

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be working with them in 2017-18.

We are now a member of the Wales Against Scams Partnership comprising of third sector organisations, trading standards, financial institutions and the Older People's Commissioner (OPC). We now attend the National Assembly for Wales Cross Party Group on Older People and Ageing and we have been invited to join the steering groups for Welsh Government's Live Fear Free helpline and the Choice Project. We met with the Police & Crime Commissioner from Dyfed-Powys as well as representatives from two of the other PCC areas and we continue to develop a relationship with and secure support from the Older People's Commissioner's office. We were also asked to contribute to Welsh Government's National Safeguarding Week by the managers of the regional safeguarding boards. Now that our presence has been established we need to seek out more opportunities to influence policy.

### **For 2017/18 we will:**

- **Continue to seek and use opportunities to influence public policy as it relates to safeguarding and protecting older people**
- **Continue to engage relevant partnerships and networks to influence the adult safeguarding and protection agenda.**

### **Awareness Raising**

Public perception is critical to elder abuse, primarily because there is a lack of understanding about the causes and extent of elder abuse, which in turn has an influence on how statutory agencies address the issue. This is particularly the case with the criminal justice system, where AEA research indicates that no more than 0.7% of abuse cases actually lead to prosecutions.

### **For 2016/17 we said we would:**

- **Identify one key abuse theme (financial abuse) that is consistent across the four nations and undertake analysis as a means of highlighting the key issues**
- **Produce a discussion paper on the agreed theme, based on the experiences of the four nations**
- **Co-ordinate a UK discussion on that theme in order to develop practice guidance**
- **Launch at least one main campaign that is relevant to all four nations**

Financial abuse was identified as the key theme for 2016-2017. AEA Cymru produced an overview of Wales' response to financial abuse, recent legislation and initiatives. This was distributed at the conference in November 2016.

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The issue of financial abuse of older people was identified as a key theme for focus and work began across the four nations to create a discussion paper to share with professionals in the UK. This work will be carried over into next year.

We launched our campaign seeking the criminalisation of elder abuse across the UK. This campaign is ongoing with the initial drive having been seeking public awareness and support. A public petition to the Home Office is ongoing on Change.org.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Progress the UK-wide practitioners guidance on financial abuse**
- **Progress the campaign to criminalise elder abuse**
- **Produce a guide on older people and domestic abuse to be launched at conference**

### **Helpline**

Elder Abuse Response is the only helpline operating in the UK that is dedicated exclusively to the issue of elder abuse. It gives emotional support, information and guidance to older people and anyone concerned about abusive and potentially abusive experiences. It also takes action to help callers who cannot get justice without support.

### **For 2016/17 we said we would:**

- **Develop new training and guidance materials to reflect the nation differences and train current staff and volunteers accordingly**
- **Actively recruit helpline volunteers in each of the nations including Welsh speaking volunteers in Wales to take helpline calls and begin to bring these new approaches on stream**

The Director of AEA Cymru contributed to in-depth training and the creation of guidance materials for the staff and volunteers in the England office to bring them up to speed with nation-specific variables in legislation etc.

Recruiting a Services Coordinator proved invaluable in progressing the development of a bilingual helpline service in Wales. The helpline volunteer training programme was developed incorporating face-to-face, e-learning training modules and guest organisation trainers ready to commence training volunteers in March 2017 (this was delayed until April 2017 due to ill-health of the Services Coordinator).

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Volunteers recruitment advertisements were placed in Welsh press and advertised bilingually via social media and printed press.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Recruit further to a volunteer team in South East Wales and identify a senior volunteer to become involved in training.**
- **Roll out the model to other areas in Wales commencing with North Wales.**
- **Deliver the service from Wales, with back up cover from England staff as and when required**
- **Ensure that any callers have the opportunity to speak to someone (live or from a call back until we have sufficient cover) in Welsh should they wish.**
- **Hold a helpline launch.**
- **Ensure widespread and targeted promotion of the helpline in Wales bilingually.**
- **Implement the CRM to ensure helpline staff and volunteers capture and build nation specific and UK wide knowledge and gather quality information on calls**

### **Media Work**

Getting our message across in newspapers and on broadcast media is integral to our overall strategy, both to raise awareness of elder abuse and to ensure as many people as possible know we are here to help. It is also a significant method by which we seek to influence social policy as politicians and policy makers can be sensitive to the information promoted by the media. Throughout the year we continued to be quoted in newspapers across the four nations, and magazines, and we gave interviews to a range of both radio and TV programmes.

### **For 2016/17 we said we would:**

- **Explore the various options for achieving our external communications objectives and look at how they may be achieved differently**
- **Continue to develop our communications strategy, and also develop a separate social media strategy**
- **Set clear goals and measurements for media activity so that we can understand and assess levels of success.**

Over the year AEA Cymru has been featured in local and specialised press as well as on BBC Radio and on the ITV Wales website with regards to the conference. Despite

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contributing to the UK-wide media strategy however we gained little traction to date with the media in Wales. This is partly because we are still establishing our credentials in Wales, against a backdrop in which we have a very active Older People's Commissioner who does excellent media work as well as other more established agencies. We need to develop our media strategies accordingly so that we are the go-to organisation when comment is required.

*We assessed this as only partially successful as we feel there is a need to strengthen our coverage in Wales.*

### **For 2017/18 we will:**

- **Continue to work within the UK wide media strategy to ensure implementation within Wales.**

### **Conferences**

Conferences are an important way in which we highlight areas of concern or of good practice, and influence the perception of practitioners and others with regard to elder abuse. AEA has a strong track record of hosting these events, and they have traditionally been a strong source of income. However, more recently such events have been regarded by AEA as primarily an influencing tool.

### **For 2016/17 we said we would:**

- **Hold four conferences, one in each nation of the UK**
- **Look at the delegate fee for conferences to ensure that it strikes the right balance between income generation and policy influencing.**

In line with AEA Scotland and AEA Northern Ireland, the AEA Cymru conference was entitled Financially Safe & Secure? Protecting older people from financial abuse. The Welsh Government Minister for Social Services and Wellbeing and the Older People's Commissioner for Wales addressed the delegates as did the Chief Executive Officers of Age Cymru, Welsh Women's Aid and Get Safe Online. Panel representatives included Office of the Public Guardian, Dyfed-Powys Police, Crown Prosecution Service and Trading Standards. Workshops on legislation in Wales, scams, perpetrators and advocacy support were also delivered.

We had overwhelmingly positive feedback from delegates attending the conference, and our profile was raised including mention on the ITV Wales website. The target of 80 delegates was achieved.

*We assessed this as successful as we had achieved our key targets in this area.*

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### **For 2017/18 we will:**

- **Deliver a regional conference on an identified theme relevant to safeguarding older people**
- **Seek opportunities to work in partnership with other organisations, input to their events and share our expertise and experiences on elder abuse in Wales.**

### **Membership**

Through our membership scheme we offer practitioners, voluntary groups and the public the opportunity to become part of a like-minded network working to eliminate elder abuse. Members receive our bulletin, Action Points, containing the latest information on policy, legislation and research relevant to the prevention of elder abuse. They are also entitled to receive discounts on our conferences. Most importantly they indicate their support for what we do and contribute an amount to the charity's income.

### **For 2016/17 we said we would:**

- **Develop specific email news bulletins for Wales and Northern Ireland**
- **Use conferences in the nations to promote membership of the charity**

During the year, we developed a newsletter for Wales and produced one standard issue, plus a conference special. We increased the number of people following AEA Cymru on social media which we have promoted at conferences, events and policy positions. Throughout all of this we highlighted the value of AEA membership. Although we do not currently identify membership through their nations, we will be introducing this centrally in the coming year.

*We assessed this as successful as we had achieved our key targets in this area.*

### **For 2017/18 we will:**

- **Disseminate quarterly AEA Cymru newsletters**
- **Promote membership at conferences, events and through website and social media**

### **Acknowledgements**

We are grateful to Awards for All (conference); Postcode Community Grant (Helpline); Elise Pilkington (Helpline); Oakdale Trust (Helpline); John Lewis, Cardiff (Helpline) who have each contributed to our progress and schemes in Scotland and to whom we extend our grateful thanks.

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## **Our work in Northern Ireland**

2016/17 was the first full year of operational work for AEA Northern Ireland and we are pleased to bring to you the news and successes of the past year. With year 1 AEA NI focused on establishing the charity within the local context, the past year has seen us build on our solid foundations and bring greater awareness not only of the work of the charity, but the wider issues facing older people in Northern Ireland.

Breaking the silence and ending the taboo of elder abuse remains key to driving improvements in public policy and changing attitudes of victims and perpetrators, the general public and professionals across the statutory, voluntary and community sector.

The external environment of course poses challenges, but against political and economic uncertainty and ever more complex cases of elder abuse coming to the fore, we have demonstrated a continued determination to deliver for victims and their families, working with stakeholders and partners to keep elder abuse high on the safeguarding agenda.

**Veronica Gray**  
**Director,**  
**AEA Northern Ireland**

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## **Public Policy**

As the only charity in Northern Ireland working exclusively on the issue of abuse of older people, our public policy work is crucial as we seek to influence current and future strategies to safeguard older adults at risk of abuse or in need of protection.

In 2016/17, we responded to a range of consultation documents relating to safeguarding older people. Having established positive working relationships with Members of the Legislative Assembly and Ministers, we continue to raise awareness of elder abuse and seek responses to issues through submission of Ministerial Questions. We took up an invitation from the Department of Justice to join a 'task and finish' group which continues to develop both the offence of domestic abuse and subsequent domestic abuse disclosure scheme for Northern Ireland. At a regional level, we maintain membership of the Northern Ireland Adult Safeguarding Partnership (NIASP), the strategic body established by the Department of Health to determine and lead the strategy for safeguarding adults at risk in Northern Ireland. We continue to chair the NIASP Prevention Workstream and in this year secured membership of the NIASP financial abuse working group, the Older People's Partnership and the regional Befriending Network.



# Action on Elder Abuse

## Directors/Trustees' Report

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*We consider that we have been successful in establishing and positioning the charity relevant to the Northern Ireland context, and have secured a significant profile within strategic partnerships.*

In the coming year it is crucial that we continue to build on these foundations and maintain the visibility of the charity and keep the issues high on the safeguarding agenda.

### **For 2017/18 we will:**

- **Continue to seek and use opportunities to influence public policy as it relates to safeguarding and protecting older people**
- **Continue to engage relevant partnerships and networks to influence the adult safeguarding and protection agenda**

### **Awareness Raising**

A key priority in this year was to start the process of raising awareness of AEA NI and influencing on the issues we had identified within Northern Ireland but also across the four nations. This included a detailed exploration of financial abuse through delivery of conferences and briefing papers, and commencing joined up UK-wide practitioner led work.

### **For 2016/17 we said we would:**

- **Identify one key abuse theme (financial abuse) that is consistent across the four nations and undertake analysis as a means of highlighting the key issues**
- **Produce a discussion paper on the agreed theme, based on the experiences of the four nations**
- **Co-ordinate a UK discussion on that theme in order to develop practice guidance**
- **Launch at least one main campaign that is relevant to all four nations**

Working in partnership with RF Associates, we delivered a research paper on the nature and extent of financial abuse in Northern Ireland, involving a literature review, and interviews with staff across the legal, justice care and financial sectors and highlighting actions all sectors can take forward. This research forms the basis of further UK wide work to produce guidance for practitioners and continue the discussion how we tackle the epidemic of financial elder abuse.

We successfully launched the Criminalisation campaign in Northern Ireland which was being launched across all four nations and we will be building on this during next year.

# Action on Elder Abuse

## Directors/Trustees' Report

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The senior management team has reached a full complement of staff and directors across all four countries and have established positive working relationships.

*We consider that we have successfully achieved the goals we had set for this year, although we acknowledge that there is further work to be undertaken in relation to the UK-wide practitioner guidance.*

For the next year, we want to continue to build our knowledge and understanding of elder abuse in the Northern Ireland and UK context, retaining a focus on financial abuse as it remains the most commonly reported concern to the helpline. This will run alongside progress on our campaign to criminalise elder abuse.

### **For 2017/18 we will:**

- **Progress the UK-wide practitioner's guidance on financial abuse**
- **Progress the campaign to criminalize elder abuse**

### **Helpline**

Elder Abuse Response is the only helpline operating in the UK that is dedicated exclusively to the issue of elder abuse. It gives emotional support, information and guidance to older people and anyone concerned about abusive and potentially abusive experiences. It also takes action to help callers who cannot get justice without support.

### **For 2016/17 we said we would:**

- Develop new training and guidance materials to reflect the nation differences and train current staff and volunteers accordingly
- Actively recruit helpline volunteers in each of the nations including Welsh speaking volunteers in Wales to take helpline calls and begin to bring these new approaches on stream
- Continue to reduce the reliance on the helpline for the provision of routine information, and increase our involvement in more complex cases through the casework approach

We developed a training programme and support materials and delivered this course to England based helpline staff and volunteers to highlight the similarities and differences in legislation, policy and regional structures in England and Northern Ireland. Simultaneously we embarked on a campaign to recruit, select and train Northern Ireland based helpline volunteers to deliver the Northern Ireland arm of Elder Abuse Response from 1<sup>st</sup> April 2017. A suite of information materials has been developed to complement the information available from the helpline, and to reduce reliance on the helpline for basic and routine information.

# Action on Elder Abuse

## Directors/Trustees' Report

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*We consider we have successfully achieved the targets we set for the last year.*

### **For 2017/18 we will:**

- **Launch the Northern Ireland arm of Elder Abuse Response**
- **Deliver the service from Northern Ireland, with back up cover from England staff as and when required**
- **Ensure widespread and targeted promotion of the helpline in Northern Ireland**
- **Implement the CRM to ensure helpline staff and volunteers capture and build nation specific and UK wide knowledge and gather quality information on calls**
- **Continue to develop information materials relevant to call themes and to support callers with further information**

### **Media Work**

Getting our message across in newspapers and on broadcast media is integral to our overall strategy, both to raise awareness of elder abuse and to ensure as many people as possible know we are here to help. It is also a significant method by which we seek to influence social policy as politicians and policy makers can be sensitive to the information promoted by the media. Throughout the year we continued to be quoted in newspapers across the four nations, and magazines, and we gave interviews to a range of both radio and TV programmes.

### **For 2016/17 we said we would:**

- Explore the various options for achieving our external communications objectives and look at how they may be achieved differently
- Continue to develop our communications strategy, and also develop a separate social media strategy
- Set clear goals and measurements for media activity so that we can understand and assess levels of success.

We have contributed to and worked within the UK-wide media engagement strategy, accessing media training opportunities to build staff confidence and competence to promote and react to emerging stories. We have provided a range of radio and TV interviews in response to local stories, which have also been carried on regional websites and in print media.

*We view this achievement as a success while recognizing that there is significant work to be continued in the coming year in order to progress this strategy.*

# Action on Elder Abuse

## Directors/Trustees' Report

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### **For 2017/18 we will:**

- **Continue to work within the UK wide media strategy to ensure implementation within Northern Ireland**

### **Conferences**

Conferences are an important way in which we highlight areas of concern or of good practice, and influence the perception of practitioners and others with regard to elder abuse. AEA has a strong track record of hosting these events, and they have traditionally been a strong source of income. However, more recently such events have been regarded by AEA as primarily an influencing tool.

### **For 2016/17 we said we would:**

- Hold four conferences, one in each nation of the UK
- Hold one of the four conferences on or near to World Elder Abuse Awareness Day (15<sup>th</sup> June);
- Look at the delegate fee for conferences to ensure that it strikes the right balance between income generation and policy influencing.

Having identified financial abuse as a key issue facing older people, as well as a gap in knowledge and understanding of the issue we hosted our first national conference "Financially Safe and Secure? Working together to address the financial abuse of older people" this year. The Minister of Justice opened the event and key note speakers included Ulster Bank who sponsored the event, Master Hilary Wells of the High Court (Care and Protection), the Commissioner for Older People for Northern Ireland, the Police Service of Northern Ireland and Health and Social Care colleagues. The event was heavily oversubscribed and the feedback from the 150 delegates was extremely positive.

In addition we held an influencing event in Stormont to mark World Elder Abuse Awareness Day (15 June) which was sponsored by an MLA and well attended by MLAs and policy makers.

*We assess these targets as successfully achieved and view our inaugural conference as one of the highlights and major successes of this year.*

### **For 2017/18 we will:**

- **Deliver a regional conference on an identified theme relevant to safeguarding older people**
- **Develop specific guidance/information related to the conference theme**

# Action on Elder Abuse

## Directors/Trustees' Report

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- **Seek opportunities to work in partnership with other organisations, input to their events and share our expertise and experiences on elder abuse in Northern Ireland**

### **Membership**

Through our membership scheme we offer practitioners, voluntary groups and the public the opportunity to become part of a like-minded network working to eliminate elder abuse. Members receive our bulletin, Action Points, containing the latest information on policy, legislation and research relevant to the prevention of elder abuse. They also receive discounts on our conferences. Most importantly they indicate their support for what we do and contribute an amount to the charity's income.

#### **For 2016/17 we said we would:**

- Develop specific email news bulletins for Wales and Northern Ireland
- Use conferences in the nations to promote membership of the charity
- Undertake a survey of members to ascertain their interests and how we might best interact with them.

During the year we developed and disseminated quarterly email news bulletins to a growing membership and contact list. Our first national conference contributed to a significant increase in membership from Northern Ireland which is a solid foundation from where we can continue to build this base.

*We assess these targets as successfully achieved.*

#### **For 2017/18 we will:**

- **Disseminate quarterly Northern Ireland newsletters**
- **Promote membership at conferences and through website and social media**

### **Development Work: Elder Abuse Recovery Service**

AEA England continues to lead the development of peer support services for older people, and there were no plans to introduce the service into Northern Ireland this year.

#### **For 2016/17 we said we would:**

- Look for options to begin developing the service in at least one of the Celtic nations.

## Action on Elder Abuse

### Directors/Trustees' Report

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Working within the four nations strategy of developing peer support for older victims to recover from abuse, we continue to learn from colleagues about the effective set up and delivery of the EARS service. As we progress implementation of the Northern Ireland based helpline in this coming year, we will be better placed to assess the placing and delivery options for EARS in the future.

#### **For 2017/18 we will:**

- **Explore the options for resourcing and piloting of EARS in Northern Ireland**
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# Action on Elder Abuse

## Directors/Trustees' Report

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### **ACKNOWLEDGEMENTS**

Action on Elder Abuse would like to thank all our supporters – individuals, Trusts, Foundations, and others - who helped us tackle elder abuse and support its victims in 2016/17. Without this support our achievements would not have been possible.

This includes our Corporate partners: Simplyhealth; SureSafe; and Mullis and Peake LLP, as well as our brilliant volunteers and those raising vital funds for Action on Elder Abuse through sponsored events and by other means.

### **FINANCIAL REVIEW**

#### **Overview:**

The charity has been in a good position this year to invest for a period of time in new posts, exploring how to improve our marketing impact. With the support of the Big Lottery, and the money from a legacy received the previous year, this was a unique position for us.

Traditionally, our income has been derived from two main sources e.g trusts/ foundations and self-generated income (e.g. income from training events, sales, speaking engagements, etc), and we have been looking at how we might best diversify that approach to avoid being dependent upon a small number of funding options. We have therefore been exploring how we might increase our self-generated income and also how we may begin to develop corporate relationships.

Our income from conferences, seminars, sales and fees earned this year was better than the previous year (by just under £3,000), but still not as good as we would like. We will continue to work on this.

Our closing balance is £494,348 of which £397,443 is unrestricted.

Our current situation places us in a good position, although we are conscious of the need to hold adequate reserves and also plan for 'year six', when the Big Lottery funding will end. We also want to maintain our relationship with some of the funders that have supported us for a very long time. We continue to highlight the unique and valuable nature of what we do, and make a clear distinction between our activities in comparison with more generic organisations. And we are demonstrating the tremendous value of our two growing services, the Helpline and the Peer Support approach, both of which are recognized by funders as extremely effective.

#### **Fundraising income**

Income from donations, legacies and grants was £746,888 of which £142,805 was unrestricted income (i.e. income that was not limited by the donor to identified

# Action on Elder Abuse

## Directors/Trustees' Report

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activities or functions).

### **Self-generated income**

This year our self-generated income (monies received as a consequence of our own services, products or activities) gave us a return of £19,884 (which was an increase on the previous year's figure of £16,962). This reflects our activities in training, conferences, sales of publications and consultancy work, and highlights the challenging environment in which we are seeking to promote our products and services.

### **Expenditure**

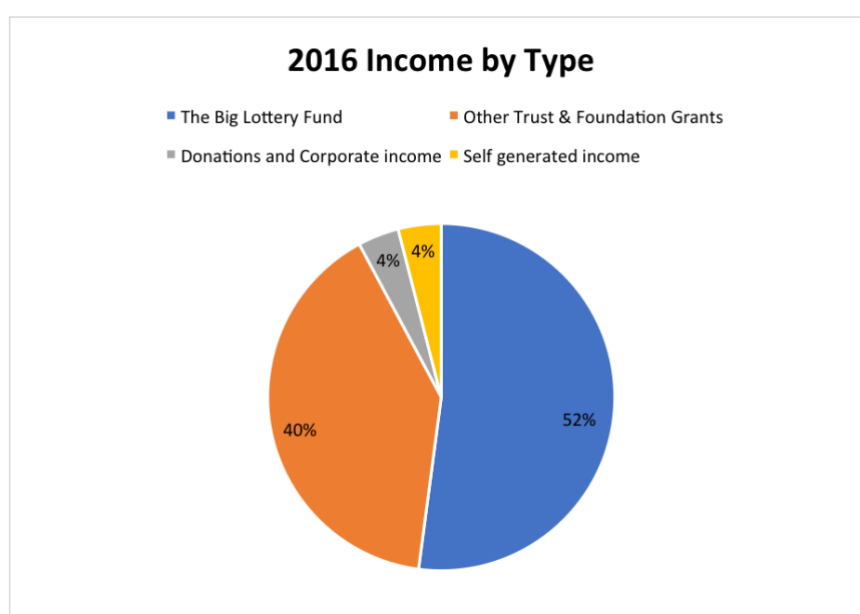
Some of our expenditure is linked to commitments within restricted activities that we cannot influence, but in other cases (and particularly in terms of conferences, and social policy) we controlled our expenditure. Our overall expenditure was £956,503.

### **Overall financial position**

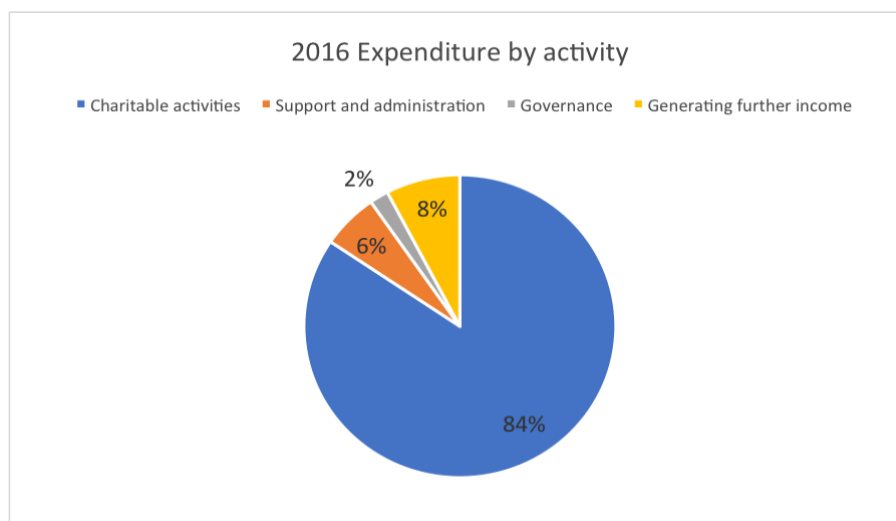
The closing balance carried forward for the year ending 31 March 2017 is £494,348 of which £402,102 is unrestricted compared with the previous years below:

Year	2017	2016	2015	2014	2013
Unrestricted	397,443	504,760	19,325	33,606	29,932

(This 2016 figure primarily reflects the positive effect of the legacy income of £460,006 which was received in that year).







### **Reserves Policy**

Our current reserves policy is to hold sufficient unrestricted funds to meet all staffing obligations, with a target of six months. This is to ensure that the charity could overcome any unexpected loss of income and give time for recovery plans to be effective. Annual staff costs are £705,532, and we require a minimum of **£352,766** to meet all staffing obligations over a six-month period. We therefore have this as a target to maintain against unrestricted funds.

### **Investment policy**

We do not currently make long-term investments since funds are required on a short-term basis. We will however be reviewing this in the new financial year.

### **Statement of Directors/Trustees' responsibilities**

The Directors/Trustees are responsible for preparing the Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice). Company law requires the Directors/Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources of the charitable company for that period. In preparing these financial statements, the Directors/Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and

# Action on Elder Abuse

## Directors/Trustees' Report

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- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The Directors/Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006 and the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Directors/Trustees are responsible for the maintenance and integrity of the charitable company and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Approved and signed on behalf of the Directors/Trustees by:



Dr John Beer  
Chair

# Action on Elder Abuse

## INDEPENDENT AUDITOR'S REPORT TO THE DIRECTORS/TRUSTEES OF ACTION ON ELDER ABUSE

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We have audited the financial statements of Action on Elder Abuse for the year ended 31 March 2017 which comprise the Statement of Financial Activities, the Balance Sheet, cash flow statement and the related notes. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) including FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland".

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

### **Respective responsibilities of trustees and auditor**

As explained more fully in the Trustees' Responsibilities Statement set out on page's 42-43, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view.

Our responsibility is to audit and express an opinion on the financial statements in accordance with applicable law and International Standards on Auditing (UK and Ireland). Those standards require us to comply with the Auditing Practices Board's Ethical Standards for Auditors.

### **Scope of the audit of the financial statements**

An audit involves obtaining evidence about the amounts and disclosures in the financial statements sufficient to give reasonable assurance that the financial statements are free from material misstatement, whether caused by fraud or error. This includes an assessment of: whether the accounting policies are appropriate to the charitable company's circumstances and have been consistently applied and adequately disclosed; the reasonableness of significant accounting estimates made by the trustees; and the overall presentation of the financial statements. In addition, we read all the financial and non-financial information in the Report of the Directors and Trustees to identify material inconsistencies with the audited financial statements and to identify any information that is apparently materially incorrect based on, or materially inconsistent with, the knowledge acquired by us in the course of performing the audit. If we become aware of any apparent material misstatements or inconsistencies we consider the implications for our report.

# Action on Elder Abuse

## INDEPENDENT AUDITOR'S REPORT TO THE DIRECTORS/TRUSTEES OF ACTION ON ELDER ABUSE

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### **Opinion on financial statements**

In our opinion, the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2017, and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice and;
- have been prepared in accordance with the requirements of the Companies Act 2006.

### **Opinion on other matter's prescribed by the Companies Act 2006**

In our opinion based on the work undertaken in the course of the audit:

- the information given in the Report of the Directors and Trustees for the financial year for which the financial statements are prepared is consistent with the financial statements
- the Report of the Directors and Trustees has been prepared in accordance with applicable legal requirements

### **Matters on which we are required to report by exception**

In the light of our knowledge and understanding of the company and its environment obtained in the course of the audit, we have not identified material misstatements in the Report of the Directors and Trustees.

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or

## Action on Elder Abuse

### INDEPENDENT AUDITOR'S REPORT TO THE DIRECTORS/TRUSTEES OF ACTION ON ELDER ABUSE

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- the trustees were not entitled to prepare the financial statements in accordance with the small companies regime and take advantage of the small companies exemption in preparing the directors' report and take advantage of the small companies exemption from the requirement to prepare a strategic report.



RICHARD DUNFORD  
(Senior Statutory Auditor)

For and on behalf of Richard Dunford & Co.  
Chartered Accountants and Statutory Auditors

Date: 10th Dec 2017

# Action on Elder Abuse

## STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2017

	Notes	Unrestricted funds	Restricted funds	Total 2017	Total 2016
<b>INCOMING RESOURCES</b>					
<i>Incoming resources from generated funds:</i>		£	£	£	£
<b>INCOME</b>					
Donations, legacies and grants	1	142805	604083	746888	1204648
Investment income	2	0	0	0	0
Charitable activities		19884	0	19884	16962
Other income		5655	1300	6955	5852
<b>TOTAL INCOMING RESOURCES</b>		<b>168344</b>	<b>605383</b>	<b>773727</b>	<b>1227462</b>
<b>EXPENDITURE</b>					
Expenditure on raising funds	3	88178	72200	160378	101389
Expenditure on charitable activities	4	177796	599621	777417	515081
Governance costs	5	9687	9021	18708	12024
<b>TOTAL EXPENDITURE</b>		<b>275661</b>	<b>680842</b>	<b>956503</b>	<b>628494</b>
<b>NET (Outgoing)/Incoming Resources</b>		<b>-107317</b>	<b>-75459</b>	<b>-182776</b>	<b>598968</b>
<b>Total funds brought forward</b>		<b>504760</b>	<b>172364</b>	<b>677124</b>	<b>78156</b>
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>397443</b>	<b>96905</b>	<b>494348</b>	<b>677124</b>

All activities relate to continuing operations.

The Statement of Financial Activities includes all gains and losses recognised in the year.

# Action on Elder Abuse

## Balance Sheet

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BALANCE SHEET at 31 March 2017		Notes	2017 £	2016 £
<b>Fixed Assets</b>				
Tangible Assets	6		3668	4509
Investments			0	0
<b>Current Assets</b>				
Debtors	7		36172	230945
Cash at bank and in hand			467472	482455
Total current assets			503644	713400
<b>Liabilities</b>				
Creditors, falling due within one year	8		12963	40785
Net current assets			490680	672615
Total Assets less current liabilities			494348	677124
<b>FUNDS</b>				
Unrestricted General Reserves			397443	504760
Restricted	9		96905	172364
TOTAL CHARITY FUNDS			494348	677124

The financial statements were approved and signed on behalf of the Directors/Trustees

On 19 December 2017



Dr John Beer (Chair)

STATEMENT OF CASHFLOWS  
FOR THE YEAR ENDING 31 MARCH 2017

	2017 £	2016 £
<b>Cash flows from operating activities:</b>		
Net (expenditure)/income for the year as per SOFA	-182776	598968
Depreciation charges	3013	2521
Interest from investments	0	0
Decrease/(increase) in debtors	194774	-199416
Increase/(Decrease) in creditors	-27822	31143
<b>Net cash (used in)/provided by operating activities</b>	<b>-12811</b>	<b>433216</b>
<b>Cash flows from investing activities:</b>		
Interest from investments	0	0
Capital Expenditure	-2172	-6659
(Decrease)/increase in cash and cash equivalents for the year	-14983	426557
Cash and cash equivalents at the beginning of the year	482456	55898
<b>Cash and cash equivalents at the end of the year</b>	<b>467472</b>	<b>482455</b>



# Action on Elder Abuse

## ACCOUNTING POLICIES

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### ACCOUNTING CONVENTION

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards. In preparing the financial statements the charity follows best practice as set out in the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) including FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" and complies with the Companies Act 2006.

### INCOMING RESOURCES

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty. Income is deferred only when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period.

In accordance with this policy, legacies are included when the charity is advised by the personal representative of an estate that payment will be made or property transferred and the amount involved can be quantified.

### RESOURCES EXPENDED AND BASIS OF ALLOCATION OF COSTS

Expenditure is included when incurred. The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity. Office costs and property related costs are apportioned in accordance with activities undertaken, and responsibilities of staff engaged in particular activities. Staff costs and office costs are allocated in accordance with work activities.

### FUND-RAISING COSTS

These include the salaries, direct expenditure and overhead costs of the staff who promote fund-raising, including events.

### GOVERNANCE COSTS

These represent costs of the independent review and holding Directors/Trustee meetings to comply with constitutional and statutory requirements.

### FUND ACCOUNTING

Funds held by the charity are:

*Unrestricted general funds* – these are funds that can be used in accordance with the charitable objects at the discretion of the Trustees.

*Restricted funds* – these are funds that can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

# Action on Elder Abuse

## ACCOUNTING POLICIES

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Further explanation of the nature and purpose of each fund is included in the notes to the accounts.

### PENSION SCHEME CONTRIBUTIONS

The Charity makes payments to defined contribution pension schemes on behalf of qualifying employees. Such contributions are charged in the Statement of Financial Activities when made. The contributions are invested separately from the Charity's assets.

### CURRENCY AND ROUNDING

The currency used by the charity is sterling. Amounts have been rounded up or down to the nearest pound.

### TANGIBLE FIXED ASSETS

Fixed assets other than donated assets are stated at historical cost.

Depreciation is provided on all tangible fixed assets calculated to write each asset down to its estimated residual value evenly over its expected useful life, as follows:

Computers	33⅓% per annum on cost
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# Action on Elder Abuse

## NOTES TO THE FINANCIAL STATEMENTS

for the year ended 31 March 2017

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Note

<b>1</b>	<b>INCOME FROM DONATIONS, GRANTS AND LEGACIES</b>	<i>Unrestricted</i>	<i>Restricted</i>	<i>Total 2017</i>	<i>Total 2016</i>
		£	£	£	£
	Donations	137236	102876	240112	60586
	Grants	0	501207	501207	684056
	Legacies	5569	0	5569	460006
		142805	604083	746888	1204648

The Charity benefits greatly from the involvement and enthusiastic support of its many volunteers, details of which are given in the Directors Report. In accordance with FRS 102 and the Charities SORP (FRS 102), the economic contribution of general volunteers is not not recognised in the financial statements.

<b>2</b>	<b>INVESTMENT INCOME AND INTEREST</b>	<i>Unrestricted</i>	<i>Restricted</i>	<i>Total 2017</i>	<i>Total 2016</i>
		£	£	£	£
	Bank interest	0	0	0	0

<b>3</b>	<b>RESOURCES EXPENDED: COST OF GENERATING FUNDS</b>	<i>Unrestricted</i>	<i>Restricted</i>	<i>Total 2017</i>	<i>Total 2016</i>
		£	£	£	£
	Staff costs	80486	30964	111450	61162
	Brochures, materials and postage	313	2346	2659	2249
	Office costs and other overheads	1237	2377	3614	5156
	Membership services	6142	36513	42655	32822
		88178	72200	160378	101389

# Action on Elder Abuse

## NOTES TO THE FINANCIAL STATEMENTS

for the year ended 31 March 2017

### 4 COST OF CHARITABLE ACTIVITIES

	<i>Unrestricted</i>	<i>Restricted</i>	<i>Total</i>	<i>Total</i>
	<i>£</i>	<i>£</i>	<i>2017</i>	<i>2016</i>
	<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
Conference/Seminar expenditure	25043	50418	75461	38642
Provision of training	16287	20399	36686	26354
Helpline and web site	48672	140142	188814	98946
Social Policy development	24221	41431	65652	49316
Media Promotion	13492	53137	66629	60204
Special Projects	50081	294094	344175	241619
<b>TOTAL CHARITABLE EXPENDITURE</b>	<b>177796</b>	<b>599621</b>	<b>777417</b>	<b>515081</b>

### 5 GOVERNANCE COSTS

	<i>Unrestricted</i>	<i>Restricted</i>	<i>Total</i>	<i>Total</i>
	<i>£</i>	<i>£</i>	<i>2017</i>	<i>2016</i>
	<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
Auditor fees	0	180	180	350
Trustee Expenses	2113	600	2713	3606
Trustee meeting venue costs	2945	600	3545	2167
Administration	4629	7641	12270	5901
<b>TOTAL</b>	<b>9687</b>	<b>9021</b>	<b>18708</b>	<b>12024</b>

AUDITORS REMUNERATION	<i>Unrestricted</i>	<i>Restricted</i>	<i>2017</i>	<i>2016</i>
	<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
Fee	914	2450	3364	3600

Table 5 shows the apportionment of costs attributed to Governance. Not all of the auditor fee has been apportioned to governance. This is in keeping with previous years and spreads the cost of the audit among all services and activities proportionately. The 'Auditors remuneration' table shows the full cost of auditor's fees.

# Action on Elder Abuse

## NOTES TO THE FINANCIAL STATEMENTS

### for the year ended 31 March 2017

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#### 6 FIXED ASSETS

Computer Equipment
Cost
£
At 1 April 2016
10006
Additions
2172
As at 31 March 2017
12178
Depreciation
At 1 April 2016
5497
Charge for the year
3013
As at 31 March 2017
8510
Net book value at 31 March 2017
3668
Net book value at 31 March 2016
4509

#### 7 DEBTORS

2017	2016
£	£
Other debtors	27597
Conference/membership debtors etc	224424
8574	6521
36171	230945

#### 8 CREDITORS, falling due within one year

2017	2016
£	£
Other Creditors	9363
Deferred Income	37185
3600	3600
12963	40785

# Action on Elder Abuse

## NOTES TO THE FINANCIAL STATEMENTS for the year ended 31 March 2017

### 9 ANALYSIS OF RESTRICTED FUNDS

	At 1 April 2016	Income	Expend	At 31 March 2017
	£	£	£	£
Comic Relief Helpline	17012	36000	39750	13262
Rausing Trust	0	40000	0	40000
Big Lottery	88108	399466	487173	401
Awards for All - England	7630	0	7630	0
Awards for All - Wales	0	4110	4110	0
Persula	0	6000	6000	0
Sussex PCC	32710	13945	32710	13945
Other peer support	0	10530	6114	4416
Other helpline	1221	8000	7821	1400
Helpline Northern Ireland	3725	4000	1602	6123
Helpline Wales	11114	1050	3356	8808
Helpline Scotland	0	8005	5	8000
Other Peer support - Scotland	0	550	0	550
Lloyds Foundation	0	23241	23241	0
City Bridge	0	14300	14300	0
Anonymous	2333	14000	16333	0
Dunhill	3511	14255	17766	0
Essex Peer Support	5000	631	5631	0
Helen Hamlyn Trust	0	3000	3000	0
Sponsorship	0	1300	1300	0
Other Restricted Trust	0	3000	3000	0
<b>TOTAL</b>	<b>172364</b>	<b>605383</b>	<b>680842</b>	<b>96905</b>

# Action on Elder Abuse

## NOTES TO THE FINANCIAL STATEMENTS

### for the year ended 31 March 2017

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#### 10 EMPLOYEES AND STAFF COSTS

The average number of employees throughout the year, calculated on a full time equivalent basis

No of Part time staff

No of full time staff

2017	2016
No	No
28	14
11	11
22	6

The costs of employing these staff were:

Salaries and Wages

National Insurance

Pension Scheme contributions

2017	2016
£	£
607685	433892
54457	36871
43390	6663

TOTAL

705532	477426
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Trustees are not remunerated. £2,713 was reimbursed for travel and other expenses to 5 trustees (2016: £3,606 to 5 Trustees)

The key management of the charity comprise the Chief Executive, the Director of Operations the Director of Development, and the four Directors for Scotland, Wales, Northern Ireland and England. The total employee benefits of key management personnel total £309,513

In accordance with SORP we confirm that the fact that there are no employees who received employee benefits (excluding employer pension costs) of more than £60,000

# Action on Elder Abuse

## NOTES TO THE FINANCIAL STATEMENTS

for the year ended 31 March 2017

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### 11 ANALYSIS OF NET ASSETS BETWEEN FUNDS

Fund balances as at 31 March 2017 are represented by

	Unrestricted £	Restricted £	Total 2017 £
Fixed assets	3668	0	3668
Current assets	406738	96905	503643
Current liabilities	-12963	0	-12963
 Total net assets at 31 March 2017	 397443	 96905	 494348

### 12 MOVEMENT ON FUNDS

	Unrestricted £	Restricted £	Total 2017 £
At 1 April 2016	504760	172364	677124
Incoming resources	168344	605383	773727
Resources expended	-275661	-680842	-956503
 At 31 March 2017	 397443	 96905	 494348

### 13 FINANCIAL COMMITMENTS

As at 31 March 2017 the charity was committed to making the following payments under non-cancellable operating leases

	Leases	
	2017 £	2016 £
Operating leases to which we are committed: (includes office rental, franking machine and photocopier)	28737	14000
 (Note: 2016 figures refer to office lease costs only)		
Total	28737	14000

### 14. POST BALANCE SHEET EVENTS: None