



# Carers of East Lothian

Supporting people who  
care for family and friends

## Annual Report & Accounts 2015-16

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Charity registered in Scotland, Charity No. SC027000  
Company Limited by Guarantee, No.SC366908



## **Chairperson's Comments**

Our 20<sup>th</sup> year has been a story of both successes and challenges. It has been marked by a continuing increase in the numbers of carers asking us for support, most commonly on the advice of other people who we have supported in the past. This is a testament to the positive impact that support for carers makes to their lives and the effectiveness of the CoEL team in delivering that support. However, cuts to funding meant that this year, for the first time in our history, we had to make a staff member redundant and cut both the hours and conditions of service for others. Given this, our success in increasing the numbers of carers we are in contact with is all the more remarkable.

As Chair of CoEL this year it falls to me to thank all those who have worked over the years to make the organisation what it is today. My thanks to my current colleagues on the Board of Directors, my predecessor in this role, Laurelle Edmunds, who was Chair for the year in question and to all past members of the Board and Management Committee over the last 20 years. My thanks also to both the current the staff and volunteer team and all those who came before them – they have been and will continue to be central to CoEL's mission of supporting all carers.

Birthdays are also a good time to look forward as well as back. I doubt there is anyone bold enough to predict where CoEL will be in another 20 years but we believe there are reasons to be optimistic about the future. The Government has announced that the new Carers Act will come into effect in April 2018 and locally we are starting to see the integration of health and social care services gathering pace. Both developments are very welcome and CoEL will continue to play a central and developing role in support for carers in East Lothian.

*David Binnie*

**Chairperson**

**October 2016**

## **About Carers of East Lothian (CoEL)**

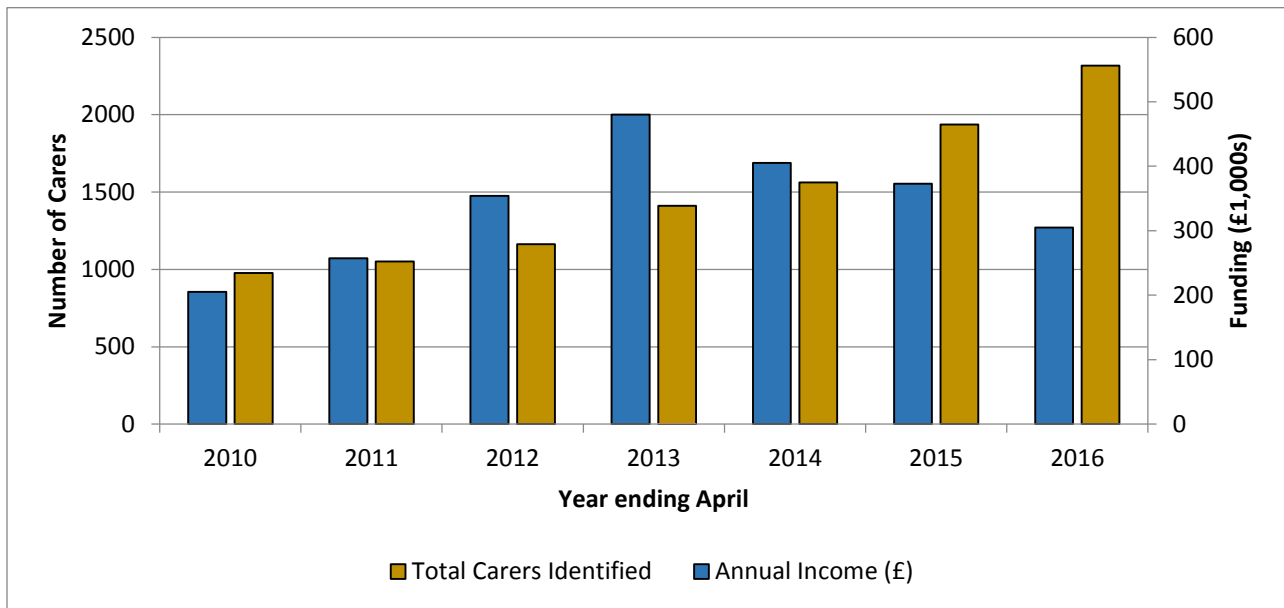
CoEL was established in October 1996 as an independent charity but one of the network of Carers Centres across the UK. CoEL used to be part of a network through the Princess Royal Trust for Carers, (PRTC - now Carers Trust) but we left in 2015 due to increasing costs and are now part of a number of Scottish networks along with all the Carers Centers across Lothian. In October 2009 CoEL's constitution changed and we became a Company Limited by Guarantee. CoEL is governed by a Board of Directors consisting of carers or former carers, while support for carers is primarily provided by a team of professional staff.

## **Our Mission**

CoEL's Mission is to "support all adults in a caring situation in East Lothian to get information and services to help their individual caring role, enhance their own wellbeing and strengthen their collective voice to improve services."

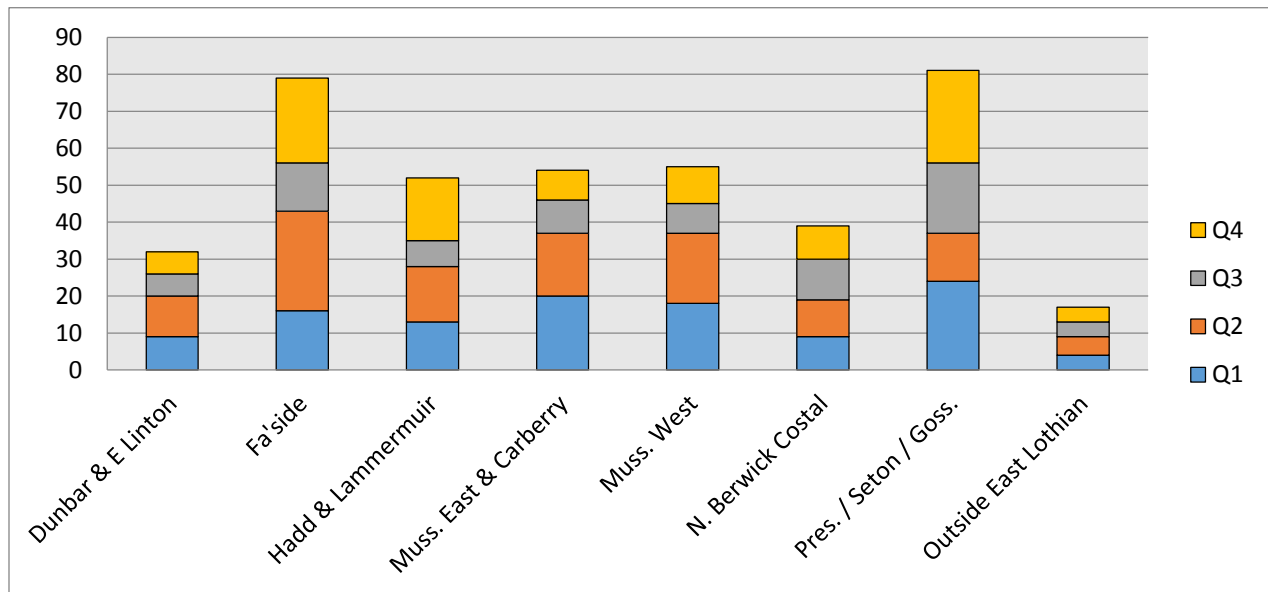
## **Support in 2015-16**

2015-16 has been another busy year for CoEL with more carers seeking support but reduced resources to for us to respond.



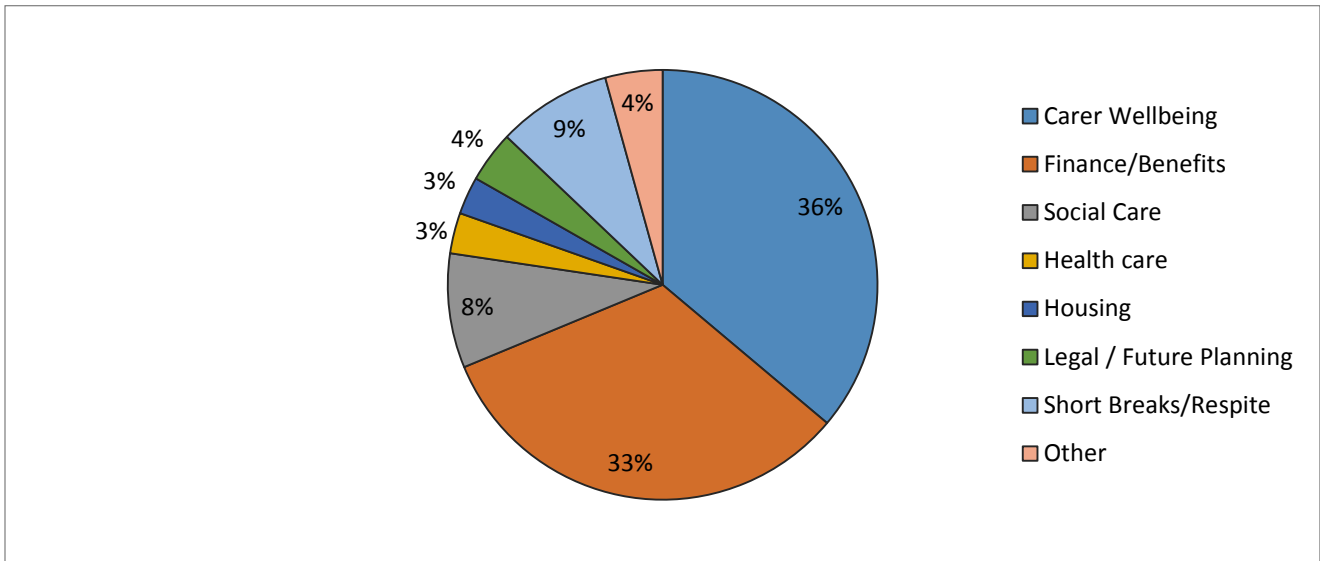
**Figure 1 CoEL - Total Carers & Annual Income by Year**

We were contacted by 331 new carers who approached us for support for the first time and 86 carers were referred to us or asked us directly for support again. Overall this represents a slight increase on the previous year. However, as shown in Figure 1, the total numbers of carers we have identified has increased markedly and at the end of March 2016 we were in contact with 2316. The trend of increasing numbers of carers looking for our support continues as does the reducing trend of our income.



**Figure 2 CoEL - Home Ward of Carers Referred in 2015/16 by Quarter**

As with previous years, the new carers seeking support from our service come from across the county but with more of a focus in the Western part of the county. This is as a result of deliberate efforts from us as the areas of greatest multi-morbidity and socio-economic challenges are in the western wards especially Fa'side and Musselburgh wards. We continue to work with more women (67%) than men (33%) but this broadly reflects the nationally picture and in 2016 we reviewed our work with people from the ethnic minorities. While



**Figure 3 CoEL - Key Presenting Issues for Carers 2016/17**

The main issues that carers are concerned with are varied but remain broadly consistent year to year. As with previous years, the most common reason carers contact us is about finance and benefits or concerns about the carers' wellbeing.

## **How CoEL supports carers**

CoEL continues to provide a range of support services for Carers in East Lothian:

### **1 to 1 Support for carers**

Much of our work involves Carer Support Workers working directly with carers to provide them with support. This will include:

- Information on all aspects of caring and advice on social care systems
- Support with applying for Powers of Attorney
- A confidential 'listening ear' which understands the pressures of being in a caring role
- Help with planning for emergencies or the future

### **Help with claiming Welfare Benefits, accessing Grants and other financial issues**

Assisting with claiming Welfare Benefits and accessing other grants and help with financial issues (such as setting up Powers of Attorney) remain a significant part of our work.

### **Respite and breaks from caring**

Our Short Breaks Service supports carers to overcome the barriers to them being able to access breaks from caring.

### **Training and Support Groups**

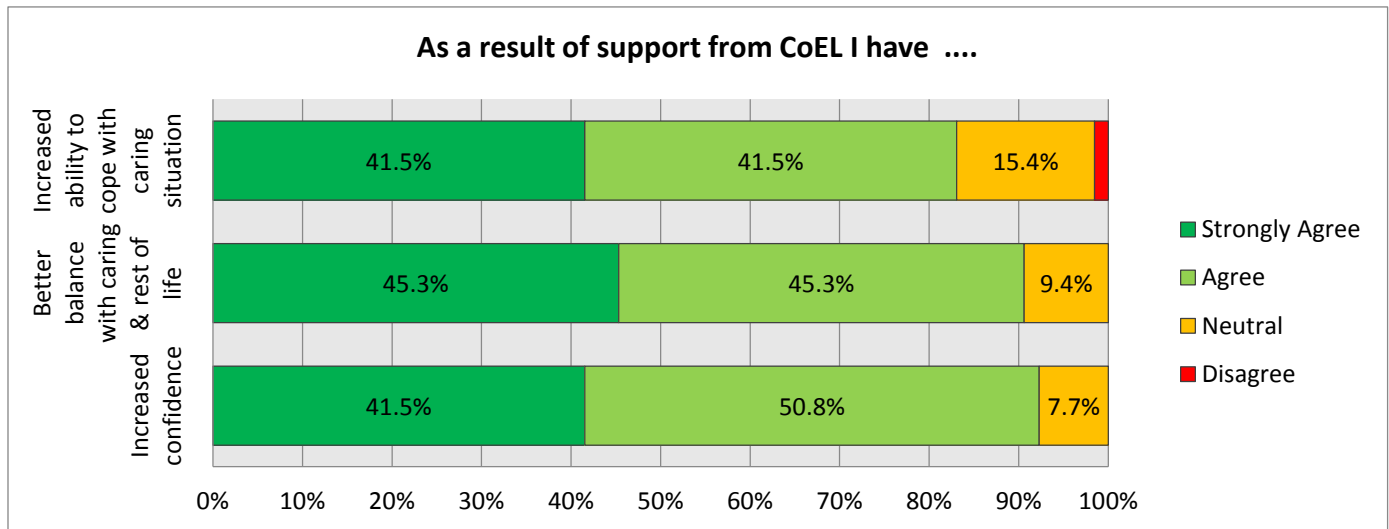
CoEL provides training and information sessions for carers and facilitates a number of support groups across the county.

### **Strengthening carers' collective voice**

This forms a significant and ongoing part of our work and we strive to work closely with both ELC and the NHS in East Lothian to try to ensure that carers needs and concerns influence policy development.

## **The Outcomes of CoEL's Work.**

Monitoring outcomes achieved for carers is integrated into our ongoing processes and carers consistently report both very high levels of satisfaction with our service (98.6% of carers rated us as good or very good overall) and, more significantly, that CoEL's support makes a real and positive difference in their lives:



**Figure 4 Outcomes from CoEL support reported by carers**

## **Restructuring**

Because of the reduction in our funding, CoEL was forced to restructure our staff team including making a staff member redundant and reducing hours for others. This was obviously a difficult period for us and has obviously impacted on our ability to support carers. However, we took the opportunity to introduce a more balanced structure for CoEL to help us better cope with the increasing challenges on the organisation. Our new structure is attached as Appendix 1

## **Future Plans**

We continue to work in line with our Strategic Business Plan 2015 which set out our key priorities for the coming years and focus around extending:

- Carer identification
- Outcomes focused support for carers around:
  - Information
  - Finances
  - Wellbeing
  - Short breaks
- Carer engagement
- Partnership development

Progress towards these priorities will be dependent on the resources available and the reduction this year has undoubtedly undermined this.

Full details of the Plan can be seen on our website ([www.coel.org.uk](http://www.coel.org.uk)).

## Our Finances

	<u>2015</u>	<u>2016</u>	
<b><u>Income</u></b>			
TOTAL	374,878	336,690	-11%
<b><u>Expenditure</u></b>			
Charitable Activities	353,725	323,246	
Support Costs	11,979	11,846	
TOTAL	365,704	335,092	-9%
<b><u>Net movement in funds</u></b>	9,174	1,598	
Funds brought forward	55,448	64,622	
Funds carried forward	64,622	66,220	
<b><u>Balance Sheet</u></b>			
Current Assets			
Cash	97,763	91,234	
Debtors	3,900	3,900	
TOTAL	101,663	95,134	
Creditors	-8,592	-12,622	
Accruals & deferred income	-28,449	-16,292	
<b><u>Net Assets</u></b>	<b>64,622</b>	<b>66,220</b>	
<b><u>Funds</u></b>			
Restricted	15,714	27,862	42%
Unrestricted	48,908	38,358	58%
TOTAL	64,622	66,220	

### Commentary

This has been another very difficult year financially for CoEL with an 11% reduction in income. As noted earlier in this report, restructuring was necessary to in light of these cuts and the combination of reduced expenditure and some additional income has enabled us to operate at a very modest surplus of £1,598 (<0.5%). While any surplus is positive, continued cuts to funding and services, especially at a time of rising demand, is not a sustainable way to provide support for carers which is at the core of CoEL's mission. In the medium term we are hopeful that the introduction of the Carers (Scotland) Act 2016 in April 2018, and the implementation funds that will come with this, makes the overall funding picture more positive although this is balance by continued austerity in the public finances. However, there is a risk that in the short term the situation becomes more uncertain as existing funding streams come to an end in anticipation of the Act.

### Principal Sources of funding

Our principal funding come from East Lothian Council and NHS Lothian via a number of different funding streams. Further details are in the accounts.

## Reserves

CoEL's policy is to hold reserves to a level representing at least 3 months' operating costs in order to guarantee the continuation of its services to carers in the event of any temporary shortfall in funding and to meet unexpected costs.

While our reserves have increased, they have also been skewed towards restricted reserves which now account for 42% of reserves. This leaves only £38,358 as unrestricted reserves which represents only 1.4 months operating costs. This is a very vulnerable position which is compounded by significant uncertainty around our ongoing funding. The Board remains committed to taking steps to ensure unrestricted reserves are increased in the medium term and we anticipate that we will operate at a modest surplus in 2016-17 which is a step in the right direction.

A full copy of our accounts is available from our website ([www.coel.org.uk](http://www.coel.org.uk)).

## **Thank You**

Lastly, but certainly not least, we need to thank our funders, our staff team and our volunteers who have dedicated so much time and effort in trying to ensure that carers receive the support they require.

*Andrew Tweedy*

**Director**

**October 2016**

## **Reference Information**

### **Board of Directors as at 1<sup>st</sup> Sept 2016**

David Binnie - Chairperson  
Sue van den Broek – Honorary Secretary  
Margaret McKay  
Jim Goddard  
Hugh Lynch  
Gill Wilson  
Roz Graham (co-opted Jan 2016)  
John Buckley (co-opted Feb 2016)  
Amy Campbell (co-opted Feb 2016)

### **Board Members who have resigned in the course of the year**

Laurelle Edmunds – Chairperson (resigned June 2016)  
Terry Denton – Honorary Treasurer (resigned Feb 2016)  
George Brown (resigned Aug 2015)  
Alan Dunton (resigned April 2015)

### **Independent Examiner**

JS Accounting Services Ltd

### **Bankers**

Royal Bank of Scotland, 36 High Street, Tranent, EH33 1HQ

### **Director**

Andrew Tweedy

# Appendix 1

CoEL Staffing / Funding - July 2016		wte	Specific Funding			Restricted by funders to:
			External	ELC	NHS/AWB	
Director		0.8	-	-	-	Core SLA / Other Projects
Carer Support Coordinator / Senior CSW (West)		0.7	-	-	-	Core SLA
Carer Support Worker (West)		0.8	-	-	13,000	CIS + Core SLA
Carer Support Worker (Rural / East)		1.0	14,500	-	20,105	Robertson Trust + CIS Rural areas
Carer Support Worker (Short Breaks)		1.0	-	-	44,500	Change Fund / ICF Short Breaks
Carer Support Worker (Mental Health)		0.7	-	-	25,262	MH SLA Mental Health
Carer Support Worker (Discharge @ Roodlands)		0.5	-	-	20,000	LTC Hospital discharge / link
Carer Support Worker (ELSIE / Crookston)		0.5	-	-	20,000	Change Fund / ICF WSP / ELSIE
Carer Support Worker (Welfare Benefits)		1.0	-	43,500	-	ELC Advice Services Income Maximisation
Admin and Finance Coordinator		0.7	-	-	-	Core SLA / Other Projects
Admin and Finance Assitant		0.5	-	-	-	Core SLA / Other Projects
		<b>Core Funding</b>				
			-	-	63,502	Core SLA ELC
			-	-	25,262	Core SLA NHS
			-	-	17,000	Core CIS
		<b>8.2</b>	<b>14,500</b>	<b>43,500</b>	<b>248,631</b>	<b>306631</b>
<b>Reduction from March 2013</b>		<b>3.2</b>	<b>-28,564</b>	<b>-33,500</b>	<b>-46,608</b>	<b>-108,672</b>