



**CYMRU OLDER PEOPLE'S ALLIANCE**  
**ANNUAL REPORT AND ACCOUNTS 2021–2022**

November 2022

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## Foreword

I am very pleased to present this sixth Annual Report for Cymru Older People's Alliance since we have become a registered charity to give a national voice for 50 plus forums and groups across Wales.

The last 12 months have again been challenging for older people as substantial impacts on their lives has continued through the pandemic. We are pleased that our charity has been able to make an influential contribution to the response by ensuring the voice of the 50+ Forums has been heard at the national level in discussions with the Commissioner about Covid-19 and information and advice about it has been disseminated on a very regular basis. We will need to campaign for older people's needs to be prioritised as society recovers from the pandemic and the implications for their lives and health become clearer.

The Board have met monthly over the last year and we have also organised monthly meetings with Forum Representatives. Since our last Annual Report was presented to a successful virtual AGM in January 2022, there has been good progress made. We continue to make a substantial contribution to the shaping of national policy through the Ministerial Advisory Forum on Ageing and related groups. Our strategic review has continued and action agreed to bring about fundamental change in the impact we are able to make. Reform and revitalisation of Forums across Wales has continued to be a priority for the Board. Whilst a Forum Development Plan is in place and a project to provide tailored support for Forums commenced, the return to normal arrangements for local Forums is still patchy and slow. I am particularly pleased that with Forum Representatives, we have developed and consulted on a new 'Criteria Framework for the Engagement of Older People in the Development of Age Friendly Communities'. We have continued to ensure that our charity is well managed and continues to meet the Charity Commission requirements for registered charities.

Looking ahead over the next 12 months, there are a number of challenges and opportunities. Ensuring the position of older people is presented robustly in how the cost-of-living crisis is handled will be essential. The Welsh Government's Strategy for an Ageing Society has been published and we will want to ensure that COPA and the forums influence the effective implementation of its Delivery Plan including how local AFCs are implemented. Above all else, we must prioritise our efforts to grow our charity and its capability, capacity, and resources so that we can better support 50+ forums across Wales. This will empower our work with Welsh Government and others to make sure that Age Friendly Communities are developed across Wales.

In closing, I want to thank Age Cymru who have given us excellent support over the last year and we are very grateful to Vicki, Kathy, and Rachel. We are also most grateful for the support and engagement that we receive from Helena Herklots, our Commissioner for Older People, and her team. Finally, thanks are due to all our Trustees and Forum Representatives for their hard work.

S G Milsom  
Chair, Cymru Older People's Alliance

## **Introduction**

1. The year 2021–2021 has been another challenging period for Cymru Older People's Alliance (COPA) and for Wales, particularly given the substantial impact of the Covid pandemic on the lives of older people. This report is the sixth Annual Report since we became a Registered Charity and covers the period from 1 December 2021 to 31 November 2022 although our accounts cover the 2021-22 financial year only.

## **Context**

2. COPA has been recognised by Welsh Government as the national charity to lead and support 50+ forums in Wales and they have provided small-scale development funding since 2014. Resources for further changes are available to ensure COPA becomes a stronger and more democratic organisation.
3. COPA brings together the views, opinions, and concerns of local older people's forums to the all-Wales level. This provides a strong, credible, and coherent voice to government at all levels and represents what older people want and need. COPA is a group that has existed in different forms and titles since 2001, initially working under the umbrella of the Welsh Government's Strategy for Older People. As such it has a strong tradition of influencing policy and practice for older people in Wales. It is now a genuinely independent organisation – a voice for older people led by older people. COPA will challenge ageism and lobby government nationally and locally through forums so older people are properly consulted and involved in decisions that affect them and their communities, built on the evidence of what is the most effective in giving everybody the opportunity to age well.
4. The future direction of COPA has continued to be discussed and agreed with members across all parts of Wales through regular engagement with forums.

## **The Board**

5. The Board of Trustees (see Appendix 1) has met regularly over the last 12 months with structured agendas and an agreed Business Plan. COPA has worked hard to devise, debate and review position papers and policies and to ensure that we fulfil Charity Commission requirements. We have made progress on some priority issues impacting on older people that we have raised in our discussions with Welsh Government Ministers and officials and with the Older People's Commissioner for Wales.

## **Reporting on Key Objectives**

6. In the last 12 months, COPA has been fully operational as a Registered Charity. A Board of 11 Trustees, including 4 co-opted Trustees, meet monthly. The COPA Board has addressed a range of issues over the last year and a short summary of the action taken is provided for the main objectives in our Business Plan for 2022–23.

## **Governance of the Charity**

7. Our Annual Report and Financial Statement agreed at our 2021 AGM (held in January 2022) were published to the Charity Commission website with our Annual Accounts.
8. Revisions to the COPA constitution that were presented to the last AGM and notification were agreed by the Charity Commission
9. We secured continuing Welsh Government funding for 2022–23 and expenditure has been monitored and reviewed on a regular basis. A decision was taken to revert to an approach of only claiming funding on a need's basis rather than automatically each quarter.
10. Continuing through the pandemic restrictions, Board meetings have been held virtually on a monthly basis to ensure COPA's continued contribution on behalf of older people's forums. Monthly meetings were also held virtually with Forum Representatives (previously known as Voting Members).
11. A strategic review of COPA, its purpose and structure were completed and as a result support has been secured to undertake a review of the future of the charity and its branding to increase awareness and improve perception, which commenced in June 2022.
12. Recruitment for new co-opted and elected Trustees was undertaken and one new Elected Trustee and one new Co-opted Trustee have been appointed.
13. A Business Plan was agreed for 2022–23 and has been submitted to Welsh Government.

## **Policy Work on Behalf of Older People**

14. The charity has been able to continue to make an influential contribution to the response to the pandemic by ensuring the voice of the 50+ forums has been heard at the national level in discussions about Covid-19 and information and advice about it has been disseminated on a regular basis.
15. COPA has continued to make a substantial contribution to the shaping of national policy through the Ministerial Advisory Forum on Ageing and related groups. We have been fully involved in the development of the Welsh Government's Strategy for an Ageing Society and related Delivery Plan.

16. A Forum Development Plan published as a basis for reform and revitalisation of Forums across Wales has been progressively implemented.
17. Communication has continued with the Deputy Minister for Health and Social Care through meetings and letters. We have responded to a variety of Welsh Government and other consultations on issues relevant to older people.
18. COPAs has worked with and supported the Commissioner in developing Age Friendly Communities in Wales and produced following consultation with Forum Representatives, a criteria Framework for the Engagement of Older People in Developing AFCs.
19. The Board and Forum Representatives made a case to the Welsh Government for the role of Older People's Champions to be revitalised at a political level in councils. Following dialogue with our charity, Welsh Government published guidance on the appointment of Age Friendly Champions and a number have already been appointed and made contact with their local forum.
20. COPA Trustees are members of the following national level groups with feedback provided to Forum Representatives;
  - a. Ministerial Advisory Forum on Ageing in Wales
  - b. Cross Party Group on Older People and Ageing
  - c. Cross Party Group on Intergenerational Solidarity
  - d. Commissioner for Older People Covid-19 National Organisations Group
  - e. Commissioner for Older People – Action Group on Elder Abuse
21. There are a range of key national policy issues where we monitor developments and secure COPA involvement and intervention where needed.
  - Cost of living
  - Recovery of society from Covid-19
  - Isolation and loneliness
  - Digital inclusion
  - Promoting Age Friendly Communities
  - Working with Ageing Well
  - Paying for care
  - Transport including bus passes
  - NHS and older people
  - Care home quality of care and life
  - Implementation of Social Services and Well-Being (Wales) Act 2014
  - Public Toilets Strategy implementation
  - UK benefits for older people including TV licence for over 75s

## **Engagement of forums**

22. The 'buddying' scheme with Forum Chairs continues to ensure sustained engagement with the membership. Under the scheme, Trustees establish and

maintain contact with Chairs to offer support for their local work and campaigning and create a two-way dialogue to inform COPA's work.

23. Monthly Forum Representatives meetings continued to be held virtually to improve communications with forums and to engage them with COPA's plans – 17 of the 22 forums are COPA members. These meetings have also brought contributions from other organisations as a basis for debate and engagement. Development of our policies has been undertaken in consultation with forums.
24. A Forum Development Plan agreed by the Board as a basis for reform and revitalisation of forums across Wales has been taken forward. It sets out our proposals for action and is being utilised as a basis for dialogue with Welsh Government and other key partners to move forward this agenda. Further action to scope the tailored support required by individual forums through a pilot scheme has commenced.
25. A Forum Grants Programme was initiated to support member forums to hold events to re-start activities post-Covid and to attract potential new members. This scheme will be extended into 2023-24 given the uncertainties about the pandemic and recovery from it.

## **Looking forward**

26. The Board of Trustees has agreed its priorities and a new Business Plan for 2022–23. The main priorities that will be targeted cover:
  - i. Make a difference to the lives of older people in particular through activity that i. addresses the consequences of increases in cost of living (including energy) for older people ii. creates age friendly communities iii. addresses isolation and loneliness iv. increases intergenerational solidarity iv. promotes well.
  - ii. Contributing to the shaping and implementation of the new Strategy for an Ageing Society and Delivery Plan including through membership of the Ministerial Advisory Forum on Ageing.
  - iii. Promote a dialogue with Welsh Government, Local Government and Commissioner for Older People to implement a programme of reform and revitalisation of forums in Wales on the basis of self-determined representation of older people.
  - iv. Working with forums and groups across all parts of Wales, implement the agreed Forum Development Framework
  - v. Undertake a review of COPA's brand to promote the organisation effectively to older people and groups and provide for a bolder voice for our charity through a new marketing strategy we will improve communications, including continued development of the website and

Facebook page and influencing of more older people's groups and new stakeholders.

- vi. Identify new opportunities to raise funding for COPA to increase its capacity to enhance its role as the national voice for 50+ forums in Wales
  - vii. hold an Annual General Meeting and publish Accounts and Annual Report
27. As a result of our Strategic Review, we will implement a programme of development. We will aim to change and grow our charity and increase its impact, capacity, and resources to enable us to maximise the potential of COPA to support the revitalisation of forums and ensure older people in communities across Wales are effectively engaged. Our new Engagement Framework will be utilised to ensure that this is done on the basis of key principles of equity and fairness.
28. Over the next year, we will seek to achieve a bolder and more effective voice for our charity through a new marketing strategy and with a new brand identity. This will include continuing to make improvements to communication in order to raise awareness of who we are and what we do. It is vital that we continue to ensure that older people's voices are heard through co-production at the planning stages of national policies, legislation, and policies. Our focus will be on engaging and improving communication with all the local 50+ forums across Wales. Campaigning priorities for the next year have been developed to provide prioritisation and direction.
29. We believe that working in partnership is the only way forward and will always aim to co-operate and engage with other older people's organisations to ensure a coherent voice is heard from older people in Wales. We will of course build on our strong partnership working with Welsh Government, the Older People's Commissioner and Age Cymru, as well as with the other national older people's organisations.
30. The new Welsh Government Strategy for an Ageing Society and associated Delivery Plan will provide a refreshed framework for COPA's policy work on behalf of older people and we want to ensure the views of Forums are taken into account in the implementations of its objectives.



## Finances

31. Total funding for 2021–22 agreed by the Welsh Government is £12,800. Due to the pandemic, it has not been possible to hold face to face meetings or progress projects. A decision was therefore taken by the Board in March 2021 not to drawdown further Welsh Government funding unless there was a clear need and demand demonstrated. This has continued during this latest financial year and is reflected in our verified accounts for the 2021-22 financial year at Appendix 2. This shows that as at the 4 April 2022 COPA hold a bank balance of £20,417.79 including reserves of £8,000. Plans have been agreed for the effective utilisation of this expenditure over the coming months. There are robust and effective arrangements for the monitoring and accountability for this expenditure through policies and processes agreed by the Board. One of the Trustees oversees these arrangements and reports to the Board on a regular basis. Any risks to the achievement of objectives and related expenditure are identified and addressed on an ongoing basis through our Risk Management policy.

## Conclusions

32. COPA's strongest public benefit is enabling older people to have the confidence and access to change the conversation about ageing in Wales to one that is lead from the experience of older people about their needs and what works best for them in an age-friendly country. The next 12 months will be critical as we continue to work with others to respond to the cost-of-living crisis, support recovery from the pandemic and ensure that 50+ forums in Wales have a viable and sustainable future and that their contribution to shaping and creating Age Friendly Communities is recognised and supported at all levels of government.

COPA Board  
November 2022

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## **Appendix 1**

### **The Board**

\*Steve Milsom – Chair and Policy Officer – Caerphilly Over 50s

Dr Ralph Stevens -Vice Chair and Communications Officer – Caerphilly Over 50

Angela Tritschler – Treasurer – RCT OPAG/50+

Lyn Finn - Events Officer – Cardiff 50+

\*Huw Bendall – Governance Officer - Cardiff 50+

\*Andrew Hinchliff – Conwy

Susanne Jones- Gwynedd Older Peoples Council

Hazel Maguire – Swansea 50+

Mollie Reach – Pembrokeshire 50+

Chris Thomas – Policy Officer - Anglesey Older People's Council (from March 2022)

\*Bishop John Davies – Powys (from September 2022)

\*Co-opted Trustee

## Appendix 2

### CYMRU OLDER PEOPLE'S ALLIANCE

### ANNUAL ACCOUNTS 2021-2022

#### INCOME

AGE UK £3,000.00 PMT020322 4/3/21

#### EXPENDITURE

300159 £40.00 A Triteschler bouquet forGDavies18/10/21

£200.00 Taff Ely 50+ COPA Grant 26/10/21

£200.00 Age Connects N Wales COPA Grant 26/10/21

£200.00 Rhondda 50+ COPA Grant 17/11/21

300162 £200.00 Cynon 50+COPA Grant 16/02/22

£310.00 Edwards Ins 31/03/22

**TOTAL INCOME £3,000.00**

**TOTAL EXPENDITURE £1,150.00**

OPENING BANK BALANCE £18,567.79

ADD: INCOME £3,000.00

LESS: EXPENDITURE £1,150.00

**CLOSING BANK BALANCE £20,417.79**