

MEETING: 31/01/2019

Ref: 14988

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support

Age UK Wandsworth

Adv: Ciaran Rafferty

Base: Wandsworth

Amount requested: £86,683

Benefit: Wandsworth

Amount recommended: £86,000

The Applicant

Age UK Wandsworth was established in 1963 and is one of the leading charities for older people in the borough. Its services include: information, advice and support; a handyperson service; befriending; carers support; and a home-from-hospital service. Each year, over 9,000 people benefit from the charity's information services whilst 2,500 received direct support.

The Application

This application is for two years' continuation funding for the organisations Advice & Support service you funded initially for three years in 2015. This is very much a holistic service – one which considers all the circumstances around an individual's need for assistance, whereas many other advice services focus solely on the presenting issue. An example might be where an older person has got into difficulties with their heating bill as a result of their income dropping. "Stand-alone" advice would perhaps help the person arrange a friendly payment schedule with the electricity provider whereas a holistic service such as that provided here would do this and seek to help the person claim benefits or to better manage their income – thereby solving the immediate problem and helping to ensure it doesn't reoccur.

The Recommendation

Your previous funding has delivered excellent outcomes for this project and monitoring has highlighted some very pertinent case-studies and issues which are becoming more widespread in their impact on older people. The service has found cases of severe poverty, for example, amongst people aged over 60 and not working/made redundant but who have not yet reached state retirement age. Many in these circumstances have had to be referred to local foodbanks but even then they do not avail of them as they are proud and don't want to be "welfare cases". Equally older people generally prefer to have face-to-face advice/support rather than via the internet or publications – so having a staffed service is appropriate. A grant is advised:

£86,000 over two further years (2 x £43,000) towards the salaries if a p/t Advice Co-ordinator (21hpw) and First Contact Co-ordinator (7hpw) plus related costs of the Advice & Support Service.

Funding History

Meeting Date	Decision
26/11/2015	An unrestricted grant of £20,000 as part of City Bridge Trust's 20th anniversary activities. The money will be used to support the recruitment of volunteers across the charity.
13/05/2015	£117,600 over three years (£38,400; £39,200; £40,000) towards the salary and running costs of the Advice & Support Service.

Background and detail of proposal

Previous work in supporting older people to access benefits and other financial support due to them has shown that every £1 invested in the service produced £5.60 in unclaimed benefits. Whilst the Advice & Support Service is run by paid staff its reach and impact is augmented by a cohort of trained volunteers. People are supported through the various stages of resolving their problems, rather than given a form to complete or signposted to a variety of other agencies and it is this holistic approach that makes it so effective.

Being a stalwart of the third sector in Wandsworth over many years means that the charity is knowledgeable of and well-connected with a range of other agencies and providers so it can access specialist help where necessary and can also provide more comprehensive support. The organisation is also held in high regard by the local authority and the two work together for the greater benefit of the borough's older people.

Financial Information

The charity receives a large proportion of its income from contracts with the local authority and other statutory bodies and, at the time of writing, is submitting its bids for these to be continued beyond 2019 (Indications from those sources are positive.) Their income increased significantly in 2017-18 due to receiving legacies to the value of £193,000. £155,705 of these funds were subsequently designated by the trustees for general purposes and, as a result, have been included in the free reserves sum shown at the year end. The cost apportioned to raising funds remains low as it represents a small proportion of the Director's salary.

Year end as at 31 March	2017 Audited Accounts £	2018 Audited Accounts £	2019 Budget £
Income & expenditure:			
Income	584,421	706,022	427,978
- % of income confirmed as at Nov 2018	n/a	n/a	100%
Expenditure	(578,427)	(556,663)	(539,238)
Total surplus/(deficit)	5,994	149,359	(111,260)
Split between:			
- Restricted surplus/(deficit)	(7,304)	(10,301)	(4,600)
- Unrestricted surplus/(deficit)	13,298	159,660	(106,660)
	5,994	149,359	(111,260)
Cost of Raising Funds	7,780	5,692	1,200
- % of income	1.3%	0.8%	0.3%
Total expenditure	578,427	556,663	539,238
Free unrestricted reserves:			
Free unrestricted reserves held at year end	265,986	425,646	318,986
No of months of total expenditure	5.5	9.2	7.1
Reserves policy target	289,214	278,332	269,619
No of months of total expenditure	6.0	6.0	6.0
Free reserves over/(under) target	(23,228)	147,315	49,367