

# The City Bridge Trust

## Investing In Londoners: Application for a grant



### About your organisation

Name of your organisation: <b>Age UK Sutton</b>	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? <b>Sutton</b>	
Contact person: <b>Mrs. Marion Harper</b>	Position: <b>Director</b>
Website: <a href="http://www.ageuk.org.uk/sutton/">http://www.ageuk.org.uk/sutton/</a>	
Legal status of organisation: <b>Registered Charity</b>	Charity, Charitable Incorporated Company or company number: <b>1085875</b>
When was your organisation established?	

### Grant Request

Under which of City Bridge Trust's programmes are you applying? <b>Older Londoners</b>
Which of the programme outcome(s) does your application aim to achieve? <b>Older Londoners having increased awareness of benefits, finance, housing and other rights</b> <b>Carers aged 65 years and over better able to access support, advice and respite</b>
Please describe the purpose of your funding request in one sentence. <b>"Advice on The Road" quality mobile information and advice delivered across the borough to target people aged over 75 and their carers.</b>
When will the funding be required? <b>01/07/2015</b>
How much funding are you requesting? Year 1: <b>£24,288</b> Year 2: <b>£23,856</b> Year 3: <b>£24,332</b>  <b>Total: £72,476</b>

**Aims of your organisation:**

Age UK Sutton is an independent local charity and member of the Age UK brand partnership. It has a strong reputation as the primary focus of older people's voice, engagement and community-led service delivery within the London Borough of Sutton. It is the only organisation in the borough committed to working holistically with the diversity of the local older population. Established in 1990 its mission is to promote the wellbeing of all older adults and to help make later life a fulfilling and enjoyable experience. The organisation aims to provide a range of practical support and caring services with and for older people, as a direct response to local need, supporting people who are amongst the Borough's most marginalised, disadvantaged and vulnerable.

**Main activities of your organisation:**

Our services and activities include an Information & Advice service, a Community Helpers befriending project for people aged 75+, Home from Hospital support, day care, social opportunities, practical home and garden support, carers' support, health & wellbeing activities, campaigns, collective and individual advocacy, money management skills development, digital inclusion activities, and intergenerational activities. Age UK Sutton also provides a very successful hub for older people's volunteering in the borough (the local volunteer centre attracts a younger cohort). Services usually operate daily or at least weekly and are delivered at various sites across the borough, including in people's homes. Some services are free to access, others are subsidised, and others at cost. Some services are open to all older people and others specifically targeted at the most deprived, vulnerable and isolated.

**Number of staff**

Full-time:	Part-time:	Management committee members:	Active volunteers:
21	9	7	264

**Property occupied by your organisation**

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
<b>Leased</b>	<b>9 years</b>

## Summary of grant request

Our aim is to extend the reach of our mobile information and advice service Advice on the Road through increasing its delivery to 3 days per week at various targeted sites across the borough of Sutton, plus provision to the housebound in their home. We will address the challenges older people face by taking our service to them. We will target those living in poverty, those aged over 75, and those with caring responsibilities.

Older people in Sutton regularly tell us they struggle to access information and advice as they are isolated, with no access to internet, and/or find travel difficult. As they age the issue becomes greater. There are 13,500 people aged 75+ in Sutton (2011). Those aged 85+ are 2.1% of the population compared to 1.5% in London. Between 2011 and 2021 our ageing population is projected to increase by 15.9%, compared to 14.2% for London and 8.6% for England (ONS, 2011). More disadvantaged older people are concentrated in particular wards, enabling geographic targeting. High inequality in the borough and reductions in services are underlined by sharp downturns in relation to barriers to housing and services (with swathes of the borough in the most deprived quintile of authorities), deprivation in relation to crime and living environment, and in worsening deprivation generally (IMD 2010).

Advice on the Road is an innovative solution to reach out by van to areas of relative deprivation and to those unable to access our services. Our Advice on the Road Manager, with volunteers, beneficiaries and wider stakeholders (including the commercial, public, voluntary and community sectors) identifies sites from which to deliver our information and advice service in the community. We have a capital-funded, operational van from within which information and advice is provided. Having successfully piloted the service, we require funding to cover staffing and volunteer costs and to further reach into areas most in need.

In our ongoing consultation, research and evaluation, Information and Advice is consistently considered most essential by older people. Services elsewhere are considered lacking or under severe strain, and Age UK Sutton is more trusted. Also, the range of our services means we bring much added value, and AUKS has extensive links with community, statutory and commercial organisations locally and beyond. Staff have effective project management skills, and view positively working with volunteers, and towards community-led goals. The team and Board bring extensive related skills and experience.

Through taking quality advice on the road for additional days we will ensure that greater numbers of older Londoners in Sutton have increased awareness of benefits, finance, housing and other rights. The project is ideally placed to reach out to those unable to access advice and support, and we will target those prevented from doing so by caring responsibilities, age and poverty. Older people (encouraged through volunteering to live more active and healthier lives) will support their isolated and vulnerable peers.

Good Practice: AUKS has a track record of co-production with and by older people. E.g. we have a history of older people-led campaigning and of ensuring older people sit on local and regional strategic forums. The current project centrally involves older people in its management and delivery. Volunteers are involved in reviewing their roles, the success of the delivery sites, and planning future activities, and also work with partner agencies. AUKS proactively addresses the borough's increasing diversity. We undertake joint work with black and minority ethnic community-led groups and lesbian, gay, bisexual and transgender groups. Age UK Sutton has a 14 page Environmental Policy and Sustainability Action Plan with extensive actions to reduce our Carbon footprint.

If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached?

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

**ISO9001, Age UK Quality Standard, Advice Services Alliance (ASA) Advice Quality Standard, Investors in People**

### **Outputs and outcomes**

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

**Delivery of quality outreach information and advice service at (indoor and outdoor) venues across Sutton borough on at least two days per week for 3 years -- targeted at areas of deprivation and with a concentration of older people aged 75+.**

**Recruit, train, induct and support volunteers to contribute to the development and delivery of Advice on the Road over three years.**

**Incorporate internet connectivity and digital inclusion activity within the service provided to support and encourage ongoing participation and increased access.**

**To continue to meet and broker use of venues as points of contact and access e.g. supermarkets, local shops, chemists and hairdressers, flu and foot care clinics, GP practices, lunch clubs, community cafes, assisted housing, churches, coffee mornings in areas of deprivation, major community events and festivals.**

**Promotion of appearances and activity via a regularly updated online calendar [<http://www.ageuk.org.uk/sutton/information--advice/advice-on-the-road-/>] and other publications (e.g. Sutton CVS, Sutton Voice, leaflets, posters and newsletters).**

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

**Older people in Sutton, and particularly those in more disadvantaged areas, aged 75+, and/or with caring responsibilities, will have a greater awareness of how to access Information and Advice.**

**Older people in Sutton, and particularly those in more disadvantaged areas, aged 75+, and/or with caring responsibilities, will have increased income/ reduced outgoings by maximising benefit uptake, savings on fuel, improved money management and price comparison.**

**Older people in Sutton, and particularly those in more disadvantaged areas, aged 75+, and/or with caring responsibilities, will have greater awareness of online opportunities in relation to information and advice, and of wider learning opportunities in relation to ensuring digital inclusion.**

**Older Sutton residents will have increased opportunity to support their fellow citizens through their driving advice van, IT, advice and wider skills, increasing confidence and wellbeing.**

**Age UK Sutton will develop relationships with new venues, businesses and community venues, with increased opportunities for them to contribute to older people's support e.g. supermarkets, pharmacies and hairdressers.**

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

**Advice on the Road will continue beyond the current period as part of our fundraising strategy. We will monitor, document and share its successes. An important outcome of the approach are the partnerships we are building with the private sector and wider on which to build.**

## Who will benefit?

### About your beneficiaries

How many people will benefit directly from the grant per year?

**230**

In which Greater London borough(s) or areas of London will your beneficiaries live?

**Sutton (100%)**

What age group(s) will benefit?

**45-64**

**65-74**

**75 and over**

What gender will beneficiaries be?

**All**

What will the ethnic grouping(s) of the beneficiaries be?

**A range of ethnic groups**

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

**21-30%**

## Funding required for the project

**What is the total cost of the proposed activity/project?**

Expenditure heading	Year 1	Year 2	Year 3	Total
Project Manager Salary (22.5 hrs)	17,078	17,420	17,768	52,266
Other staff and volunteer costs	2,250	765	780	3,795
Premises	2,000	2,040	2,081	6,121
Delivery Costs	2,960	3,631	3,703	10,294
Management Costs	3,733	3,578	3,650	10,961
Capital: Current value of the Van	4,860	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
<b>TOTAL:</b>	<b>32,881</b>	<b>27,434</b>	<b>27,982</b>	<b>83,437</b>

**What income has already been raised?**

Source	Year 1	Year 2	Year 3	Total
Age UK Sutton Reserves (contribution of m'ment cost)	3,538	3,609	3,681	10,828
Age UK Sutton (current value of Van)	4,860	0	0	0
[In-kind contribution of partners re use of venue]	0	0	0	0
[In-kind contribution of volunteers driving/advising]	0	0	0	0
<b>TOTAL:</b>	<b>8,398</b>	<b>3,609</b>	<b>3,681</b>	<b>10,820</b>

**What other funders are currently considering the proposal?**

Source	Year 1	Year 2	Year 3	Total
none	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**How much is requested from the Trust?**

Expenditure heading	Year 1	Year 2	Year 3	Total
Project Manager Salary (22.5 hrs)	17,078	17,420	17,768	52,266
Other staff and volunteer costs	2,250	765	780	3,795
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Delivery Costs	2,960	3,631	3,703	10,294
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
<b>TOTAL:</b>	<b>24,288</b>	<b>23,856</b>	<b>24,332</b>	<b>72,476</b>

## Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month: <b>March</b>	Year: <b>2014</b>
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Income received from:	£
Voluntary income	95,275
Activities for generating funds	36,784
Investment income	3,239
Income from charitable activities	571,583
Other sources	0
<b>Total Income:</b>	<b>706,881</b>

Expenditure:	£
Charitable activities	577,768
Governance costs	13,667
Cost of generating funds	20,106
Other	0
<b>Total Expenditure:</b>	<b>611,541</b>
<b>Net (deficit)/surplus:</b>	<b>95,340</b>
<b>Other Recognised Gains/(Losses):</b>	<b>5,361</b>
<b>Net Movement in Funds:</b>	<b>100,701</b>

Asset position at year end	£
Fixed assets	6,665
Investments	304,922
Net current assets	404,890
Long-term liabilities	0
<b>*Total Assets (A):</b>	<b>716,447</b>

Reserves at year end	£
Restricted funds	384,163
Endowment Funds	229,500
Unrestricted funds	102,814
<b>*Total Reserves (B):</b>	<b>716,477</b>

\* Please note that total Assets (A) and Total Reserves (B) should be the same.

### Statutory funding

For your most recent financial year, what % of your income was from statutory sources?  
41-50%

### Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

None



### Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.

	2012 £	2013 £	2014 £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	163,319	194,822	177,764
London Councils	0	0	0
Health Authorities	27,500	54,166	203,135
Central Government departments	19,096	0	0
Other statutory bodies	0	0	0

### Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	2012 £	2013 £	2014 £
Big Lottery Fund	0	0	21,000
Comic Relief	0	0	29,919
Lloyds TSB	0	13,375	15,000
Age UK	25,000	28,000	17,381
Wilkinson	0	1,000	1,000

### Declaration

I confirm that, to the best of my knowledge, all the information I have provided in this application form is correct. I fully understand that City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance.

Please confirm: Yes      Full Name: **Marion Harper**

Role within                      **Chief Executive Officer**  
Organisation: