

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Age Concern Wandsworth	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Wandsworth	
Contact person: Ms Rachel Corry	Position: Chief Executive
Website: http://www.ageukwandsworth.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1069406
When was your organisation established? 01/04/1963	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Older Londoners REDUCING POVERTY
Which of the programme outcome(s) does your application aim to achieve? Older Londoners having increased awareness of benefits, finance, housing and other rights
Please describe the purpose of your funding request in one sentence. To enable older people to have access to information and advice on benefits, housing and other issues <i>More people accessing debt and legal services</i>
When will the funding be required? 01/04/2015
How much funding are you requesting? Year 1: £40,647 Year 2: £41,460 Year 3: £42,289 Total: £124,395

Aims of your organisation:

Age UK Wandsworth's mission is to promote the wellbeing of all older people and to help make life a fulfilling and enjoyable experience.

We aim to:

- ensure older people have the same rights and equality as all people
- enable older people to participate fully in society, on equal terms with everyone else
- enable older people to have information about rights and facilities
- assist older people to play an active part within their community, to have opportunities for leisure, enjoyment and creativity
- enable older people to have a voice when services and facilities are being planned and set in motion
- enable older people to maintain their lifestyle with dignity and respect and in a manner in which they choose
- ensure older people from different backgrounds, cultures and religions have equal access to Age UK Wandsworth's services

Main activities of your organisation:

1. Information, advice and support on a wide range of issues for older people and their carers
2. Befriending for isolated and housebound older people
3. Carers Support offers advice, information and support on housing, benefits, social and leisure services, telephone calls for extra emotional and practical support, befriending support and social groups
4. The Handyperson service undertakes minor repairs, DIY tasks, installation of grab rails and other small jobs in and around the home
5. Home from Hospital offers practical support and assistance to older people in their homes for up to six weeks after they have left hospital
6. Garden Friends matches older people who need help to manage their garden with volunteers who provide practical help in the garden and befriending
7. Out and About provides occasional trips out to local places for older people who have difficulty getting out of the house
8. Shopping service provides internet shopping for those who can not access a computer

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
7	14	11	197

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?
Leased	July 2017

Summary of grant request

Advice & Support aims to improve quality of life and wellbeing for older people in Wandsworth through better access to holistic, independent advice. This will help older people to secure their rights and entitlements and make informed choices on a range of critical issues, including benefits, money, housing, health and disability, access to care, transport and information on local services and social activities.

Why the project is needed:

- High-quality, timely advice can prevent further crisis situations developing (financial, emotional, health and legal), and often, when advice is sought, other problems are uncovered (Manifesto for Advice, Citizens Advice Bureau, 2004).
- In an Age UK survey on the impact of Information and Advice services, 72% of respondents said their level of anxiety or worry had improved and 68% were happier / more contented (Who can I turn to?, 2012). When asked how they preferred to receive information or support, 54% put local, face-to-face contact as their first choice.
- For every £1 invested in our service, £6.30 is generated for older people in the Borough through unclaimed benefits.

What we will do:

- Help to improve quality of life for older people in Wandsworth by providing information, advice, signposting and detailed casework on benefits, housing, finance and local services.
- Improve access to advice for those who don't know how or where to get help by providing information in a variety of formats, through home visits for those that are housebound, and by conducting outreach surgeries in deprived areas where we know older people are more likely to have lower incomes, experience fuel poverty and other issues relating to debt and accessing care.
- Carry out regular evaluation and monitoring to demonstrate that the service improves health and wellbeing, increases awareness of rights and enables older people to remain independent.

Age UK Wandsworth is the right organisation to deliver this project because we:

- have over 50 years experience of delivering innovative and effective frontline services to local and vulnerable older people.
- are the only local provider specialising in providing holistic advice for all older people in the borough.
- are an independent organisation that is trusted by older people.
- hold the new Age UK quality advice standard

The Advice & Support Service will meet the Trust's outcomes by supporting older Londoners, particularly those aged 75 and over to:

- Improve their financial wellbeing by being able to better meet their basic needs such as food and clothing and to pay their bills.
- Continue to live independently by being able to afford access aids and adaptations, hire additional help or purchase care and support services.
- Improve their housing conditions or moving to more suitable accommodation.

During our project we will:

- Regularly collect feedback from service users to inform project planning and delivery.
- Carry out focus groups with older people to discuss the development of the service, identify areas of need and how the service can meet those needs.
- Ensure our Board of Trustees continues to be led by older people.
- Involve older volunteers in providing initial information and signposting, help with form filling and evaluation. All volunteers receive induction training and regular supervision.
- Ensure the project is accessible to all by offering advice by telephone, in person or in large print and ensure volunteers on reception and any images produced on printed material reflect the ethnic diversity of Wandsworth.

• Encourage Advice staff to travel by public transport when making home visits, recycle materials within the office, create an organisational Green Policy and apply for a City Bridge Eco Audit.

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?

Age UK advice quality mark

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.

Provide information and advice to 375 older people in person, by telephone, by email/letter and through detailed casework on welfare benefits, housing, personal finance, and local services, through surgeries, office appointments as well as home-visits for those who are frail or housebound.

Hold 20 outreach surgeries per year in GP surgeries, day centres, health centres, older people's groups and clubs, sheltered housing schemes and with other local organisations including Tax Help for Older People and Action on Hearing Loss.

Print and distribute 3,000 information leaflets covering a range of subjects such as housing, care providers, finance and other rights and entitlements, and distribute these through the Age UK office and other local statutory and voluntary organisations.

Create and maintain a directory of local services (web-based database with print functionality) including local care providers, domiciliary care agencies and care homes and publicise through local networks, voluntary organisations and outreach surgeries.

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 Wandsworth will experience reduced stress and anxiety as a result of better access to advice on benefits, housing, finance and local services, leading to improved wellbeing.

Older people in Wandsworth on low incomes will have improved economic wellbeing as a result of increased levels of income generated by advice services.

Older people in Wandsworth have improved confidence and self-esteem, as a result of having more choice and control over the issues that affect them, helping them to live more independently.

Reduced isolation amongst older people through providing a gateway to other Age UK Wandsworth services such as Be a Friend, Out and About, Carers' Support and Garden Friends and other local services.

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?

We are developing a strategic plan for 2015-18 which sets out our long-term vision for the sustainability of our services. We have achieved the Age UK quality mark for our advice service which will help us to build a case for support to future funders and identify how we can sustain future services at a time of reduced public spending

Who will benefit?

About your beneficiaries

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

375

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

Wandsworth (100%)

What age group(s) will benefit?

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?

1-10%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary costs of Advice Coordinator (28 hrs), incl NI and Pension	29,351	29,939	30,537	0
Salary costs of Advice Worker (21 hrs), incl NI and Pension	18,815	19,192	19,575	0
Salary costs of Information Coordinator (21 hrs), incl NI and Pension	17,070	17,411	17,759	0
Travel and training for staff and volunteers	1,200	1,224	1,248	0
User involvement and evaluation	2,500	2,550	2,601	0
Marketing costs (incl database)	2,000	2,040	2,081	0
Contribution to premises -- rent, utilities, cleaning	10,037	10,238	10,442	0
Contribution to office costs	8,944	9,123	9,305	0
Management costs	6,294	6,420	6,549	0
TOTAL:	96,212	98,136	100,099	0

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
Nil	0	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
Big Lottery Reaching Communities	96,212	98,136	100,099	294,446
	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary costs of Advice Coordinator	29,351	29,939	30,537	89,827
Proportionate contribution to premises - rent, utilities, cleaning	3,585	3,656	3,729	10,970
Proportionate contribution to office costs - telephone, postage, printing	3,194	3,258	3,323	9,776
Management costs @12.5%	4,516	4,607	4,699	13,820
	0	0	0	0
TOTAL:	40,647	41,460	42,289	124,395

Finance details

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

Financial year ended:	Month: March	Year: 2014
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Income received from:	£
Voluntary income	38,638
Activities for generating funds	24,210
Investment income	1,493
Income from charitable activities	523,575
Other sources	9,025
Total Income:	596,941

Expenditure:	£
Charitable activities	691,034
Governance costs	7,952
Cost of generating funds	10,880
Other	0
Total Expenditure:	709,866
Net (deficit)/surplus:	-112,925
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	-112,925

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	311,064
Long-term liabilities	0
*Total Assets (A):	311,064

Reserves at year end	£
Restricted funds	50,192
Endowment Funds	0
Unrestricted funds	260,872
*Total Reserves (B):	311,064

*** 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?
71-80%

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	314,621	253,310	200,692
London Councils	3,236	0	0
Health Authorities	167,808	210,084	228,730
Central Government departments	27,770	21,913	31,426
Other statutory bodies	175	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	55,400	70,000	10,050
British Gas Energy Trust	2,983	0	0
London Community Foundation	0	1,500	0
	0	0	0
	0	0	0

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: **Rachel Corry**

Role within **Chief Executive**
Organisation:

APPENDIX A
(REVISED COSTINGS)

Revised request/project costs (Age Concern Wandsworth)

	2015/16	2016/17	2017/18	Total
Salary costs of Advice Coordinator (7 hrs per week)	7,441	7,590	7,742	22,773
Salary costs of Advice Worker (14 hrs per week)	12,697	12,950	13,209	38,857
Salary costs of First Contact Coordinator (7 hours p/week)	6,079	6,200	6,324	18,603
Directory	1,150	1,173	1,196	3,519
Contribution to premises – rent, utilities, cleaning	3,585	3,656	3,729	10,970
Contribution to office costs - telephone, postage, printing	3,194	3,258	3,323	9,776
Sub total	34,145	34,828	35,525	104,498
Management costs @12.5%	4,268	4,354	4,441	13,062
Total	38,413	39,182	39,965	117,560

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