

MEETING 04/07/2013

Ref: 11604

ASSESSMENT CATEGORY - Older Londoners

Age Concern Westminster
Amount requested: £99,933
{Revised request: £110,682}
Amount recommended: £110,500

Adv: Jenny Field
Base: Westminster
Benefit: Westminster

Purpose of grant request: 'Westminster Give & Receive Project' - making happier, healthier lives for residents 65 and over through volunteering, and "a bit of help" to support independence.

Background

Age Concern Westminster (ACW) was originally established in 1947. Today, it provides a range of services for older people commonly associated with the Age Concern/Age UK brand. These include advice and information and related services; befriending; support for older people managing direct payments; advocacy and representation; a charity shop providing volunteer placements and work experience for older residents, ex-prisoners, and for young disabled people; and various social events and celebrations. It was due to be re-branded as Age UK Westminster in June 2013.

Funding History

You have funded ACW on three occasions since 1996, the last being a grant of £96,000 over three years, approved in January 2004, towards an information and advice service. This grant came to an end in August 2007 and monitoring has been of a high standard.

Current Application

You are requested to support a volunteering project, "Give and Receive", over the next three years. The premise behind it is that rather than make older people passive recipients of help, for example with shopping or odd-jobs around the house, the skills and experience that they have are in turn recognised. For example, someone might need to visit a housebound person so that they themselves can be befriended.

A full-time Volunteer Co-ordinator would act as the central point of contact for volunteers and service users. The Co-ordinator would be responsible for recruiting new volunteers, obtaining CRB checks, and providing them with training and support. By working with ACW's service and volunteer forums, the Co-ordinator will also look into what the obstacles to volunteering are and how they can be overcome. The range of volunteering opportunities available will be wide-ranging, to reflect the "little bit of extra help" that helps an older person to live independently.

The benefits to older people of volunteering have been well-documented in contributing to increased health and well-being.

Financial Observations

For a number of years, ACW had carried a substantial pensions deficit on its balance sheet. This, together with other creditors, amounted to £1.1m as at 30th September 2011 and led to the external auditor expressing concern in an 'Emphasis of matter – Going Concern' statement in his report for that year. In order to resolve this, the charity entered into a Company Voluntary Agreement with its creditors. This was completed towards the end of 2012 and the audited accounts for the year ended 30th September 2012 show that this reduced the charity's creditors from £1.1m to £113,570. The same accounts show that free reserves stood at just over £60,000 which represents 2.5 months' worth of current year expenditure. ACW's trustees advise that they are currently reviewing their reserves policy. The surplus of £7,710 at the financial year end September 2012 represented 2% of turnover.

A recent forecast for the current year to 30th September 2013 shows income of £301,000, which ACW advises is all confirmed, and an overall surplus of £10,000. Free unrestricted reserves are forecast to be £74,100 at the year end, which equates to just over 3 months' worth of total expenditure.

Officer's Appraisal

ACW has come through a difficult period financially and its trustees are firmly committed to plan for its future. The proposal before you reflects the trustees' commitment to increase the charity's use of volunteers where appropriate in delivering services. This is a very practical project that will help older people in Westminster to live independently and reduce social isolation.

The original application requested a grant on a slight taper as it was intended to introduce a charging system during years 2 and 3 for clients receiving practical help. However, during the assessment discussion, it was agreed that this rather went in the face of the 'Give and Take' ethos of the project and might skew it in favour of those who can afford to pay rather than reach those most in need. A revised breakdown for the full cost in years 2 and 3 has since been submitted and is provided at Appendix A to the application form.

Recommendation

£110,500 over 3 years (£36,700; £37,800; £36,000) towards the full-time salary of a Volunteer Co-ordinator, plus associated running costs, of a volunteering project benefitting older people.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11604

Date Received:

04/01/2013

Programme
Area:

04

1. About your organisation

Name of organisation applying for grant: Age Concern Westminster	
If the organisation is part of a larger organisation, what is its name? No.	
Address for correspondence: 26 Seymour Street London	
Postcode: W1H 7JA Is this your home address? No	
Contact person: Ms Alison Chandler	Position: Business Manager
Phone: 07949874647	Fax:
E-mail: achandler@acwestminster.org.uk	
Website: http://www.acwestminster.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1018300	
Date organisation established: 01/06/1947	

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2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Older Londoners
Purpose for which funds are requested: (25 words maximum) 'Westminster Give & Receive Project' - making happier, healthier lives for residents 65 and over through volunteering, and "a bit of help" to support independence.
How much funding is requested? Year 1: £39,982 Year 2: £34,811 Year 3: £25,140 Total: £99,933

3. Aims of your organisation

Age Concern Westminster's principal aims are:-

- to promote a positive attitude towards older people and ageing
- to promote well-being, positive health and effective social care for older people including via preventative services
- to encourage choice and opportunity for older people
- to support greater engagement by older people in civil society and in shaping the policies that affect their lives

We provide a wide variety of services to reduce hardship, disadvantage and isolation for older people in our local community. Westminster's demographic for older people also focuses our attention on a variety of Black & Minority Ethnic Groups (BME) that are resident in the borough. In particular particularly we provide opportunities for older service users to get involved in Age Concern Westminster's volunteer programme. Many volunteers work in our shops and in befriending, supporting information and advice services; they are also involved in providing input to the development of future services through service users groups.

4. Main activities of your organisation

Our main activities are:

Information and Advice -- reaching over 600 residents per year

Befriending reaching 319 isolated older people in Westminster

Assistance on a range of financial, social and practical issues from nine advice points

Specialist services for Black & Ethnic Groups and particularly in the Asian community

Advocacy/Representation

Telephone, email and walk-in information and referral service

Outreach work

Partnering the Department of Work & Pensions and Westminster Benefits Advice Team to maximise financial benefits for older people.

Provision of support and assistance to approximately 50 older people making use of the Direct Payments budgets for social care.

Provision of advice, support and guidance on putting together tailored care packages for older people

Support for local Winter Warmth campaign

A Charity shop providing volunteer placements and work experience to older residents, prisoners, the autistic and young people

A variety of seasonal activities including a dinner delivered on Christmas day, corporate sponsored Christmas lunches, and hamper deliveries

User involvement activities to help shape our services

Specialist volunteer programmes tailored for older people, the unemployed, prisoners, young adults and autistic adults

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
6	0	8	200

6. How do you support your volunteers?

We have a full time volunteer co-ordinator (funding ends February 2013) to recruit, induct, place and support volunteers and a team of volunteers supporting this role and conduct administrative activities. Our volunteer forums ensure input to our process and help shape and develop volunteer support.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	Rent free lease 10/12 to 06/13

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **September**

Year: **2012**

Income received from:	£
Voluntary income	104,696
Activities for generating funds	81,637
Investment income	2,992
Income from charitable activities	195,831
Other sources	
Total Income	385,156

Expenditure:	£
Charitable activities	289,025
Governance costs	4,287
Cost of generating funds	84,134
Other	
Total Expenditure	377,446
(Deficit)/surplus for the year:	7,710

Asset position at year end	£
Fixed assets	4,722
Investments	
Net current assets	77,724
Long-term liabilities	
*Total A	82,446

Reserves at year end	£
Endowment funds	
Restricted funds	17,609
Unrestricted funds	64,837
*Total B	82,446

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
51%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Following timely action by Trustees/Management, acting on professional advice, the organisation implemented a Company Voluntary Arrangement (CVA) to resolve a pension deficit born of underperformance. This legally ratified arrangement was necessary to ensure continued viability for the charity and was successfully completed on 06/12/2012. Concurrently, a new Management Board was implemented and a right sizing plan delivered (See Appendix IV of full proposal submitted)

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?

12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:
(i) City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)
(iv) Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii) Westminster City Council	1,117,414	893,266	427,701
(iii) Access All Areas	8,235	7,194	0
(iv) Central London Healthcare			19,056
(v)			
(vi)			

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Hyde Park Place Estates	5,000	0
Edward Harvist Trust	927	0
The Mercers Company	12,000	0
Age UK various small grants	1,000	5,000

14. What steps is your organisation taking to reduce its carbon footprint?

We have an implemented environmental policy that includes:

- increasing environmental awareness with older people, staff, volunteers and clients including in planning meetings and user groups
- environmental costs and benefits analysis are included in the assessment of new and existing operations
- We minimise activities that contribute to climate change, ozone layer depletion and acid rain, and water pollution
- We reduce waste at source, reuse and repair materials that cannot be reduced and recycle materials that cannot be reused
- Resources & Materials we purchase products and materials with the least environmental impact and use recycled products, purchase timber products from legal and sustainably managed sources
- Our charity shop is instrumental in reducing landfill through the recycling of donated goods either back into use through re-sale, or through channelling into recycling suppliers with strong environmental policies and practices.

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

In order to provide the right information, please refer to guidance note 15 before completing this section.

The "Give & Receive" project proposal is aimed to achieve a major increase in the numbers of older people, 65 and over, volunteering in Westminster.

The project looks primarily to address the City Bridge Trust theme "Work encouraging healthy lifestyles with older people 65 years old and above. An additional theme touched on by the project will be "Work with older people (75 years old and above) including.....volunteering activities..... encouraging healthy lifestyles"

For older people, the project aims to challenge the assumption that an older person can only receive support. Mobility and health restrictions accounted for, roles supporting others through telephone or face to face befriending are still possible and will allow older people to gain the benefits from volunteering, feeling useful, and active in society.

Research has established the link between health and retirement satisfaction and volunteer work (Griffin & Hesketh, 2010). The project aims to leverage this link to encourage older people to live healthier and more active lives, and actively encourage more older people into volunteering. The project aims to provide volunteer opportunities tailored for older people even if they have mobility or health problems, so that they can experience the health benefits of volunteering.

For Age Concern Westminster, combining the need for "a little bit of help", befriending, and older volunteer opportunities would allow older people to support each other in the community. Provision of these key preventative services help keep older people independent in their own homes for longer, and support happier and healthier lives help avoiding more costly social or medical interventions.

Guided by our service user and volunteer forums, older people will be at the heart of the project. Forums will guide service and volunteer role design, look at obstacles to volunteering, and offer solutions to address issues around volunteering for those who may have mobility or health restrictions.

The work will be delivered in the community, in the homes of older people, and centrally supported by Age Concern Westminster infrastructure. The project aims to run over 3 years with the following objectives:

1. To increase volunteer numbers for those aged 65 plus:
 - to engage service recipients into volunteering on an exchange basis
 - provide a structured training/engagement programme suitable for older people
 - to offering volunteer opportunities suitable to older people's needs, aspirations and physical restrictions
 - Increase remit of existing service user and volunteer groups to lead on design of volunteer roles, identify obstacles to volunteering for those aged 65 or over, and look at resolutions
 - to measure the health benefits of volunteering for the participants
 2. To deliver a "little bit of help" to older people to support independent living in their own homes and encourage healthier lifestyles
 - Befriending and telephone befriending to combat social isolation
 - Escorting to ensure that health check appointments are kept
 - Gardening/Odd jobs at home to support independent living
 - Provide basic healthy living advice and guidance
 - To signpost older people towards accessing the service and support their needs
 3. Given that health concerns and isolation impact equally those who are better off, a research programme during the first year to evaluate the willingness to pay for "a little bit of help" and the feasibility to provide sustainable funding for the project in the longer term.
- Further information regarding Age Concern Westminster, meeting the Trust's Principles of Good Practice and other details can be found within sections of the full proposal document.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

Information gathered following delivery using Charity Log includes:

- Register of volunteers & clients including Name, Do B, Address, D of B, Ethnicity, CRB check, training record, mini CV
- Details of matching Volunteer to Service User
- Number visits
- Volunteer Notes
- User satisfaction survey by telephone after task completion
- Feedback from User Steering Group - structure discussion on which services to prioritise

The last two will provide feedback on quality of service, measurement of satisfaction, and feedback to further delivery of service.

Service User engagement is integral to this project. This includes:

- Creation of Service Users Steering Group for the project
- Creation of local Service Users Forums building on ACW existing relationships
- Quarterly Volunteers meeting to network and share ideas
- Discussions with - Local lunch groups, Marylebone Pensioners scheme, Advocacy Plus, Senior Citizens Forum Westminster

An independent evaluation will be commissioned.

17. Beneficiaries

How many people will benefit from the grant per year?
~~830~~ 120

In which local authority is your organisation based?
Westminster

Which borough(s) of Greater London will benefit from this grant?
 (if more than one, please give % for each)
Westminster primarily but those on the borders of the borough (e.g. Camden and Islington) will not be excluded from benefit from the project.

At what address will the activity be located?
Service delivery occurs wholly in the community including in the homes of vulnerable older people. Organisational aspects and training will occur centrally in our offices.

What age group will benefit? **over 60**

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

	%		%
White - British	29	Black - Caribbean	9
White - Irish	6	Black - African	5
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian	6	Black - British	7
Asian - Pakistani	3	Chinese	3
Asian - Bangladeshi	4		
Asian - Other (please describe)		Other (please describe)	
Asian/Arab/North African	22	East or Western European	6
Open to everyone			

What proportion of the beneficiaries will be disabled people?
30%

18. Funding required for the project

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff Costs Project Coordinator incl on costs	28,120	28,120	28,120	84,360
Management Costs (CEO)	2,812	2,812	2,812	8,436
Office Costs	950	979	1,008	2,936
Training Programme	1,500	1,500	1,500	4,500
Charity Log	4,600	0	0	4,600
Marketing & Promotion	1,200	1,200	1,200	3,600
Independent Evaluation	0	2,000	0	2,000
Volunteer Expenses	800	1,200	1,500	3,500
TOTAL	39,982	37,811	36,140	113,932

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Income from charges		3,000	11,000	14,000
TOTAL		3,000	11,000	14,000

What other funders are currently considering the proposal?

Funder	£
TOTAL	

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff Costs Volunteer /Project Coordinator incl on costs	28,120	28,120	18,500	74,740
Management Costs (CEO)	2,812	2,812	2,812	8,436
Office Costs	950	979	1,008	2,937
Training Programme	1,500	0	1,500	3,000
Charity Log	4,600	0	0	4,600
Marketing & Promotion	1,200	0	820	2,020
Independent Evaluation	0	2,000	0	2,000
Travel Expenses	800	900	500	2,200
TOTAL	39,982	34,811	25,140	99,933

20. Funding requested from the Trust (continued)

When will the funding be required?

29/03/2013

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced?

We will explore sustainability over the term of the project using income generation from year 2. We will explore charging a fee for clients who can afford to pay, and using this income to deliver free services to those who cannot pay for support. This will link to Direct Payments and Individual Budgets where relevant.

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

There are no planning or other statutory consents required.

Declaration on behalf of applicant organisation

I, Alison Chandler am an authorised representative of Age Concern Westminster

within which I am Business Manager

To the best of my knowledge, all the information that I have provided in this application form is correct



Signature

Date 04/01/2013

Return the completed form to: The City Bridge Trust
City of London
PO Box 270
Guildhall
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

18. Funding required for the project

What is the total cost of the proposed activity/project?
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff Costs Project Coordinator incl on costs	28,120	28,120	28,120	84,360
Management Costs (CEO) (10%)	2,812	2,812	2,812	8,436
Office Costs	950	979	1,008	2,936
Volunteer Training Programme	1,500	1,500	1,500	4,500
Charity Log Training 3 days	1,350	0	0	1,350
Marketing & Promotion	1,200	1,200	1,200	3,600
Independent Evaluation	0	2,000	0	2,000
Volunteer Expenses	800	1,200	1,500	3,500
TOTAL	36,732	37,811	36,140	110,682

What income has already been raised?
(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
TOTAL				

What other funders are currently considering the proposal?

None

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff Costs Project Coordinator incl on costs	28,120	28,120	28,120	84,360
Management Costs (CEO) (10%)	2,812	2,812	2,812	8,436
Office Costs	950	979	1,008	2,936
Volunteer Training Programme	1,500	1,500	1,500	4,500
Charity Log Training 3 days	1,350	0	0	1,350
Marketing & Promotion	1,200	1,200	1,200	3,600
Independent Evaluation	0	2,000	0	2,000
Volunteer Expenses	800	1,200	1,500	3,500
TOTAL	36,732	37,811	36,140	110,682