

MEETING: 04/07/2013

REF: 11664

ASSESSMENT CATEGORY - Older Londoners

Dulwich Helpline and Southwark Churches Care

Adv: Karisia Gichuke

Amount requested: £120,000

**Base: Southwark
Benefit: Southwark**

Amount recommended: £120,000

Purpose of grant request: To establish a project which will improve the services offered to people with dementia and their carers, plus some core funding for on-going projects.

Background

For 20 years, Dulwich Helpline and Southwark Churches Care operated as two separate charities, each recruiting volunteers to relieve social isolation of older people in Southwark. The two organisations merged on 30 September 2012, and befriending continues to be at the core of the new organisation, Dulwich Helpline and Southwark Churches Care's (DH&SCC) work, providing social exchange and enabling people to remain in touch with their communities. The charity also runs social activities and provides help with homes and gardens, and facilitates transport for people who would otherwise experience difficulty getting out and about.

Funding History

You assisted both organisations prior to their merger. Dulwich Helpline on three previous occasions, in January 1996, with a grant of £5,000 for office equipment, in November 2000, with a grant of £60,000 towards the costs of providing educational and recreational opportunities for older people, and in February 2006 with a grant of £90,000 for a volunteering project to support isolated older people. You assisted Southwark Churches Care (SCC) on two previous occasions, in February 1998, with a grant of £30,000 towards the salary costs of coordinating volunteers providing a befriending service to vulnerable older people, and in February 2006, with a grant of £45,000 for the salary of a Volunteer Co-ordinator.

Current Application

Many interventions in health and social care focus on supporting people intensively after a crisis, offering short interventions. Longer term home care is restricted to needs deemed 'critical' or 'substantial'. It is often not holistic nor does it manage to counteract social isolation. There is a need for interactions that are unhurried and recurring. The average age of the people using DH&SCC's services is now 82. Many have some cognitive impairment but do not meet the eligibility criteria for any formal care. At present, the organisation is struggling to help them because its volunteer training on dementia is not at a sufficiently high level to equip either staff or volunteers to cope with people who have more than mild memory loss.

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The organisation wishes to appoint a part time (.5 FTE) Dementia Project Manager with specialist experience to provide education and training for staff and volunteers, and design and manage the associated work streams. DH&SCC also seeks to increase its volunteers in order to meet the growing need for this work, and so the request is to cover an additional day a week of the current Volunteer Coordinator's salary. The organisation is also seeking funds for a Project Worker's salary. Currently, practice is to hire help to oversee the safe transportation and supervision of the groups of older people that it works with. If this bid is successful, the organisation will be dealing with more vulnerable people and it would improve practice to have a regular contact that it employs directly to do the kind of care oversight that is needed when working with these groups.

Financial Observations

The Charity Commission website records that SCC was deleted following the merger of the two charities on 30 September 2012. The newly merged charity advises that the closing net assets of SCC amounting to £40,880 were transferred to DH&SCC on merging. Dulwich Helpline's last set of audited accounts, for the year ended 31 March 2012 show an overall surplus of £17,158 (7.5% of turnover), comprising an unrestricted fund surplus of £17,469 partially offset by a small restricted fund deficit of £311. Its free unrestricted reserves at this date were £180,870.

Draft accounts for the year ended 31 March 2013 for the new organisation DH&SCC show a surplus of £32,039 on unrestricted funds. At the end of the financial year free unrestricted reserves are expected to be £212,909. Free reserves at this level meet the reserves policy target of the new organisation, which requires a holding of £190k to £250k. This is set to cover 6-9 months of normal operations and to permit an orderly wind up of DH&SCC (approx. £70,000) should the need ever arise. The reserves policy has also been set at this level as the future of Dulwich Community Hospital, where DH&SCC is currently accommodated at a favourable rate, has become increasingly uncertain.

The 2013/14 budget shows total income of £225,950 and a projected deficit of £7,651. £153,750 (68%) of the organisation's budgeted income is confirmed to date. It is recommended that any grant awarded by CBT today be subject to receipt of satisfactory and audited accounts for the first year of the newly merged charity to 31st March 2013.

Officer's Appraisal

DH&SCC is a long standing charity supporting isolated and vulnerable older people and their carers in Southwark. The social impact of dementia is extreme, and the London Borough of Southwark's own analysis anticipates a rise in the number of people with the illness; in 2010 there were around 1800 people with a diagnosis of dementia in the borough, and by 2015 this is expected to have more than doubled. The organisation has recognised that it must adapt to meet the changing needs of the population, and this application will enable it to do so.

Recommendation

£120,000 over three years (£40,000; £40,000; £40,000) towards the following posts: Dementia Project Manager (2.5 dpw); Volunteer Coordinator (1 dpw); and a freelance Project Worker (at the equivalent rate of 6 hpw) - within a project to improve the services offered to people with dementia and their carers. The grant is subject to receipt of satisfactory audited accounts for the first year of the newly merged charity to 31st March 2013.



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)

11664

Date Received:

21/02/2013

Programme
Area:

05

1. About your organisation

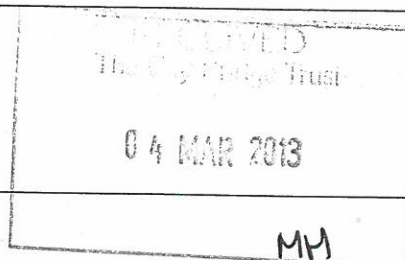
Name of organisation applying for grant:

Dulwich Helpline and Southwark Churches Care

If the organisation is part of a larger organisation, what is its name?

Address for correspondence:

**Dulwich Community Hospital
East Dulwich Grove
London**



Postcode: **SE22 8PT**

Is this your home address? ~~Yes~~ NO

Contact person:

Mrs. Barbara Scott

Position:

Director

Phone: **0208 299 2623**

Fax: **0208 299 2623**

E-mail: **barbara@dulwich-helpline.org.uk**

Website: **http://www.dulwich-helpline.org.uk**
www.southwarkchurchescare.org.uk

Legal status of organisation: **Registered Charity**

If registered, please give charity number: **1105923**

Date organisation established: **03/07/1993**

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)

To establish a project which will improve the services we offer to people with dementia and their carers, plus some core funding for ongoing projects.

How much funding is requested?

Year 1: £40,000 Year 2: £40,000 Year 3: £40,000 Total: £120,000

3. Aims of your organisation

The newly merged charity of Dulwich Helpline and Southwark Churches Care aims to improve the quality of life and help to prevent physical and mental deterioration of isolated older people in Southwark by running volunteer projects designed to combat loneliness and to provide emotional and practical support.

We want to see an enrichment of the local community in which people of all ages, particularly older people, feel respected, safe, and a part of the life going on around them; a community that recognises that older people can make a valuable contribution and where people of all ages can get to know and help one another.

4. Main activities of your organisation

Our organisation has at any time between 450-500 people who use the different strands of activity we offer.

We currently have 349 volunteers working with us. Many are involved in both direct service user provision and the support and fundraising activities run by the charity.

There are 5 main strands of activity to our work:

- * Befriending - One to one befriending where regular visiting is established with a volunteer. It may involve some practical help or sorting out some aspect of domestic administration or may just be a social interlude.
- * Gardening and domestic assistance - Volunteers help with gardening and domestic tasks such as putting up curtains or changing light bulbs.
- * Transport - This involves volunteers in driving people to appointments or to one of our social groups.
- * Social groups - There are around 20 social groups operating throughout the week, ranging from art appreciation to chair based yoga.
- * Inter-generational groups in local schools - we have run groups in four local schools offering help with computers in one school and oral history in three others.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
2	5	14	343

6. How do you support your volunteers?

We support our volunteers through a planned programme of training and through volunteer socials. We also offer more concentrated support if there are difficulties or complex issues which emerge in the interaction between a volunteer and the person receiving the service.

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	Rolling lease

8. Finance

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

Financial year ended - **Month: March**

Year: 2012

Income received	£
Voluntary income	112,579
Activities for generating funds	22,450
Investment income	2,887
Income from charitable activities	92,138
Other sources	0
Total Income	230,054

Expenditure:	£
Charitable activities	176,064
Governance costs	16,552
Cost of generating funds	20,280
Other	0
Total Expenditure:	212,896
(Deficit)/surplus for the year:	17,185

Asset position at year end:	£
Fixed assets	0
Investments	0
Net current assets (liabilities)	184,000
Long-term liabilities	0
*Total A:	184,000

Reserves at year end:	£
Endowment funds	0
Restricted funds	0
Unrestricted funds	184,000
*Total B:	184,000

* 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?
50%

10. Material changes

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

Over the past year the two charities Dulwich Helpline (DH) and Southwark Churches Care (SCC) have worked together to become one. The trustees, staff and assets have been absorbed into DH and SCC has closed. We are now known as Dulwich Helpline and Southwark Churches Care and this title is now registered with the Charity Commission.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				
Month/Year:	04.09	Ref:	6869	Grant received: £170,084 OR application rejected? No
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) London Borough of Southwark Southwark Council Transition Fund	93,973	93,973	88,858 6,500
(iii)			
(iv)			
(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
Henry Smith Charity	20,000	20,000
Rayne Foundation	12,500	
Merchant Taylors' Company	10,000	7,500
Robert McAlpine Foundation	10,000	
Sobell Foundation	10,000	10,000
Various Grants each less than 5,000	30,000	20,000

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

We occupy a small suite of serviced offices situated in an old community hospital currently owned and managed by NHS Southwark. The compliance regime would follow NHS guidelines on these matters, but we are not in a position to influence the energy supplier or measures to conserve heat and light. However as a staff team we use resources judiciously.

NHS Southwark provides good recycling facilities, which we use within our suite of offices. We reuse and recycle wherever possible. Most staff travel is by public transport.

Where we use transport for user activities we are conscious that we use the most appropriate transport, at the least cost available, to facilitate access to activities. Computers are shut down when not in use and we do not leave equipment on standby.

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.

We have noticed over the past year a marked increase in the number of people with dementia and enduring mental health problems being referred to Dulwich Helpline and Southwark Churches Care (DH&SCC). We know that people with these health challenges wait longer to be matched with volunteers than people who are cognitively intact. We have had 58 such people referred to our organisation from statutory and voluntary sector partners this year. We are unsure whether this is as a result of the contraction of statutory and voluntary sector providers or as a result of early diagnosis.

The average age of our service users is now 82 and we know that within this cohort there are people with varying degrees of dementia, anxiety and depression. In circumstances where we have been involved with people before they had problem, we are part of the architecture of their lives and they are generally well integrated into our community. We wish to find ways of extending this offer to other people who are not so well supported.

We also have volunteers who are willing to receive additional training and wish to work with people who have these difficulties.

We have approached this project in a new way by firstly discussing the work we would like to do with colleagues in the South London and Maudsley Mental Health Trust (SLaM), who have given facilitation and project support. We have also held a scoping meeting with volunteers, trustees, and professionals, and a focus group meeting. The next step is to establish a project board to enable us to have a specific strand of governance and oversight.

The work thus far suggests that this project could offer multiple sub-projects in order to include as many people as possible:

*We want to offer a pool of volunteers to newly diagnosed people with dementia and to people with mental health problems. They could benefit from a befriender, with specific knowledge about the concerns and anxieties that would occur in this situation, who would help with information and support over time.

*We would like to establish a social group for people with dementia which has therapeutic input.

*A social group for service users and carers. We have done this in the past and it worked well because the group were all very well aware of the problems they faced. We feel that as the social world contracts for the person affected it also contracts for their carer and they need social outlets where they will be unembarrassed by any unusual behaviour.

*We recognise that carers have a particularly difficult time and we would like to establish a pool of volunteers who might be willing offer a sitting service or an accompanying service. We know getting to appointments can present overwhelming obstacles for people who have major caring responsibilities. Someone to sit in a waiting room whilst a consultation takes place could potentially be helpful.

In order to do this we need to recruit a project manager to enskill the rest of the team and to ensure the project meets the milestones set.

The initial objective in the broadest sense would be to:

- * make our community 'dementia friendly'
- * help people live well with their illness
- * support carers with practical help and support
- * decrease the sense of isolation experienced by users and carers
- * offer specific help around effective communication, managing distress and orientation.
- * increase the number of older volunteers

We believe we can deliver this programme because of our track record in recruiting and supporting volunteers since 1993.

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

We will monitor the project through regular reports to the project management group to be held quarterly. The report will cover both the number of volunteers and service users and carers recruited and supported over time. The number of activities with attendance figures or episodes of help offered over the duration of the project, including trends over time.

We will investigate further the use of an appropriate well-being tool to assess users and carers over the life of the project to test whether our involvement makes a difference.

The trustee board is very strong at present and all except 2 of the 14 trustees are older themselves. The majority are heavily involved in all aspects of the charity's activities.

We know that the people using our activities really value more mature volunteers. We want to attract people of all ages and we want to promote diversity across the spectrum.

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year?

100

What age group will benefit? over 60

In which local authority is your organisation based?

Southwark

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)

Southwark

At what address will the activity be located?

The activity will be located in the homes of service users and community spaces

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

	%		%
White - British	80	Black - Caribbean	4
White - Irish	3	Black - African	2
White - Other (please describe)		Black - Other (please describe)	
Not specified	5	Not specified	2
Asian - Indian	2	Black - British	
Asian - Pakistani		Chinese	1
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
		Not specified	1
			Open to everyone
			100

What proportion of the beneficiaries will be disabled people?

40%

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 £
Project Co-ordinator Salary (0.5fte)	17,000	17,000	17,000	51,000
Volunteer Co-ordinator Salary (0.2fte)	6,000	6,000	6,000	18,000
Project Worker(s) Salary (freelance)	6,000	6,000	6,000	18,000
Transport	6,000	6,000	6,000	18,000
Materials and Consumables	4,000	4,000	4,000	12,000
Contribution to Support Costs	8,000	8,000	8,000	24,000
Infrastructure set up	2,000			2,000
TOTAL	49,000	47,000	47,000	143,000

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
From our own reserves	9,000	7,000	7,000	23,000
TOTAL	9,000	7,000	7,000	23,000

What other funders are currently considering the proposal?

Funder	£
St. Ss. I	
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 £
Project Co-ordinator Salary (0.5fte)	17,000	17,000	17,000	51,000
Volunteer Co-ordinator Salary (0.2fte)	6,000	6,000	6,000	18,000
Project Worker(s) Salary (freelance)	6,000	6,000	6,000	18,000
Transport	6,000	6,000	6,000	18,000
Materials and Consumables	4,000	4,000	4,000	12,000
Contribution to Support Costs	1,000	1,000	1,000	3,000
TOTAL	40,000	40,000	40,000	120,000

20. Funding requested from the Trust (continued)

When will the funding be required?

03/01/2013

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced?

We aim to incorporate this project into our main programme and will seek ongoing funding from a variety of sources, including local fundraising. We are also willing to use some of our reserves to underwrite this project as we believe it is a much needed service.

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

Declaration on behalf of applicant organisation

I, BARBARIA SCOTT (your name)

am an authorised representative of

DULWICH HELPLINE & SOUTHWARK CHURCHES CARE (your organisation)

within which I am the Director (your position)

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

Signature Barbara Scott Date 1.03.13

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email raiseyourconcern@cityoflondon.gov.uk

Return the completed form to: The City Bridge Trust

City of London
PO Box 270
Guildhall
London EC2P 2EJ