

**MEETING: 04/07/2013**

**Ref: 11686**

**ASSESSMENT CATEGORY - Older Londoners**

**Elders Voice**

**Adv: Ciaran Rafferty**

**Base: Brent**

**Amount requested: £86,146**

**Benefit: Brent**

**Amount recommended: £86,000**

**Purpose of grant request:** Manage volunteering in Elders Voice, increasing the number of older volunteers, and creating a volunteer driving service to enable more people to access healthy living classes.

**Background**

Elders Voice works with over 21,500 people each year. Established in 1993 its remit is to work in Brent though it is now amending its objects to enable it to provide for neighbouring boroughs. Services for older people and their families/carers include: accident prevention workshops, befriending, gardening, day care (via 3 x day centres), and a variety of clubs and classes. The 2011 Census showed that Brent had over 32,000 residents aged 65 or above.

**Funding History**

The organisation has received funding on two previous occasions. Firstly, in September 2001 with a three-year grant of £32,500 for an outreach worker; and then in May 2006 when a grant of £75,000 supported the post of Development Manager for a Healthy Living initiative for three years. Both grants returned very good monitoring reports.

(Elders Voice currently receives funding - £20,000 - from the City of London to run the City Carers' Service.)

**Current Application**

Much of Elders Voice's work relies on volunteers, whether formally or informally. Volunteering in itself is seen as a valuable service by many of the clients and the majority of the helpers are older people. (Although the current average age of volunteers across the organisation is 59 the average age of those assisting with the clubs and classes is 75.)

This application is to formalise volunteering within Elders Voice by employing a part-time (2.5dpw) Co-ordinator who will develop a congruent system for recruitment, support, training, deployment and monitoring. A new volunteer driving scheme will be developed which will help older service-users overcome the biggest barrier they face - transport. Currently there is no designated volunteer manager within the organisation and the successful deployment of volunteers varies greatly from service to service. With proper coordination the organisation



estimates that most of the people attending the clubs and classes will experience a tangible improvement in their health and well-being through and their access to the activities will be greatly enhanced.

### **Financial Observations**

Accounts for the year ended 31<sup>st</sup> March 2012 show a deficit of £83,756 (13.5% of turnover), comprising a restricted fund deficit of £90,101, partially offset by a surplus on unrestricted funds of £6,345. The restricted fund deficit was largely due to a reduction in local authority funding for the 'supporting people project'. The Board also decided to invest in exploring other income streams – which involved the temporary employment of a management consultant and the opening of a charity shop. (Neither of these ventures proved cost-effective and have subsequently been terminated).

The organisation's reserves policy is to set aside 25% of turnover, equivalent to £101,540 based on current year income, to safeguard the charity's service commitment. At 31<sup>st</sup> March 2012 free unrestricted reserves stood at £213,001 equating to 6.3 months' worth of current year expenditure.

Draft accounts for the year ended 31<sup>st</sup> March 2013 indicate a deficit of £159,109 (32.4% of turnover), almost half of which was on unrestricted funds (£75,665), reducing the level of free unrestricted reserves held to £145,674 (4.3 months' worth of current year expenditure). Income has reduced by some 21% from 2012 to 2013 and the organisation explains this decrease as being largely the result of the end of a lottery grant and reduced day-care funding.

The forecast for 2013/14 indicates a deficit of £7,929 on a projected income of £406,160, of which £346,160 (85%) is from grant income that has been confirmed, with the balance of £60,000 (15%) to be earned from fees during the year. Owing to the prior year deficit, the organisation advises that it has implemented several measures to ensure that income and expenditure are more balanced including: raising some of the lost day-centre funding through fees, expanding its work to other boroughs, charging for some services, and rationalising its staffing structure.

### **Officer's Appraisal**

Elders Voice has a demonstrable track record in providing high-quality services to a large audience of older people across Brent. It is an organisation which needs and values its army of volunteers and your support for a dedicated post to manage this important function will greatly enhance the range and quality of services for older people.

### **Recommendation**

**£86,000 over three years (£27,800; £28,700; £29,500) for the salary of a p/t (2.5dpw) Volunteer Development Manager plus associated running costs for the volunteering programme.**



# 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)

11686

Date Received:

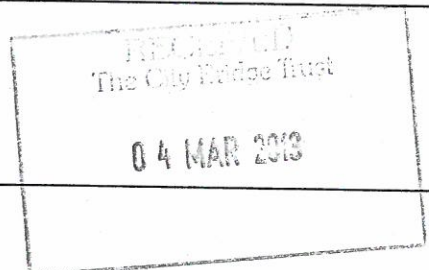
4 Mar 13

Programme

Area: 5

### 1. About your organisation

Name of organisation applying for grant: <b>Elders Voice</b>	
If the organisation is part of a larger organisation, what is its name? <b>Not applicable</b>	
Address for correspondence <b>181 Mortimer Road Kensal Green London</b>	
Postcode: <b>NW10 5TN</b>	
Is this your home address? <b>No</b>	
Contact person: <b>Ms Lisa Ehlers</b>	Position: <b>Community Development Manager</b>
Phone: <b>020 8206 7513</b>	Fax: <b>020 8968 8170</b>
E-mail: <b>lisae@eldersvoice.org.uk</b>	
Website: <b>www.eldersvoice.org.uk</b>	
Legal status of organisation: <b>Company Limited by guarantee and registered charity</b>	
If registered, please give charity number: <b>1091519</b>	
Year and month organisation established: <b>December 1993</b>	



### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Older Londoners</b>
Purpose for which funds are requested: (25 words maximum) <b>Manage volunteering in Elders Voice, increasing the number of older volunteers, and creating a volunteer driving service to enable more people to access healthy living classes.</b>
How much funding is requested? <b>Year 1: £27,870 Year 2: £28,706 Year 3: £29,570</b> <b>Total: £86,146</b>



### 3. Aims of your organisation

Elders Voice delivers high quality services for older people, to enable them to live an enjoyable and safe life.

We treat people

- honestly and openly
- with dignity and respect
- equally and fairly, and to value diversity
- with empathy and understanding

We enable older people to live independently and actively in the community, and work with and for older people to provide quality services that bring immediate relief and provide new opportunities.

We speak on the needs and rights of older people to ensure they receive the services they are entitled to.

### 4. Main activities of your organisation

Elders Voice works with and for older people to provide opportunities and quality services that help them to remain active and independent in their own community. We offer practical support around the home, day care and opportunities to participate in arts, social and healthy living activities.

Our services include:

- 3 Day Centres (catering for a wide variety of needs including dementia, and offering a range of interactive programmes)
- an Accident Prevention Service (offering repairs, maintenance and disability aids)
- a Gardening Service (including gardening clubs)
- Carers' Support and Advice (ensuring carers have support to cope)
- Befriending Project (matching volunteers with housebound elders)
- Intergenerational Work (breaking down barriers between the generations)
- Clubs and Classes (keeping older people fitter and active for longer)

We encourage older people to volunteer and give them training, support and supervision.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
6	162	7	50

### 6. How do you support your volunteers?

Volunteers receive regular support and supervision from their line managers and attend required training. We also have quarterly social gatherings which allow for volunteers to meet each other, staff and trustees.

### 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	10 years

## 8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	4,176
Activities for generating funds	
Investment income	2,242
Income from charitable activities	611,580
Other sources	
<b>Total Income</b>	<b>617,998</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	698,930
Governance costs	2824
Cost of generating funds	
Other	
<b>Total Expenditure</b>	<b>701,754</b>
<b>(Deficit)/surplus for the year:</b>	<b>(83,756)</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	36,151
Investments	
Net current assets	261,929
Long-term liabilities	
<b>*Total A</b>	<b>298,080</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	48,928
Unrestricted funds	249,152
<b>*Total B</b>	<b>298,080</b>

\* 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?  
69%

## 10. Material changes

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

The Local Authority has reduced the amount per head they pay for our day care services; our response has been to introduce additional sessions increasing our capacity and thereby drive down the cost per head of management and overheads, and to introduce privately funded places to ensure we can continue to offer this service. We are responding to appropriate tenders to gain funding.



## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: Jan	/	2006	Ref: 7120	Grant received: £75,000	OR application rejected <input type="checkbox"/>
Month/Year: May	/	2001	Ref: 1518	Grant received: £32,500	OR application rejected <input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected <input type="checkbox"/>

## 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: 2010	Year: 2011	Year: 2012
(i) London Borough of Brent	358,443	430,007	324,727
(ii) Department of Health		18,895	
(iii) Transition Fund			67,000
(iv) London Fire and Planning	2,313	2,175	1,025
(v) Telecare	28,011	25,248	31,597
(vi) South Kilburn NDC	13,333		

## 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: 2011	Year: 2012
The Big Lottery	117,150	129,271
Lloyds TSB		14,600
The Sobell Foundation	2,500	10,000
Edward Harvist Trust	1,750	1,700
The Rank Foundation	20,000	

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

Our office regularly recycles paper, plastic, cardboard, tins and glass according to our local Council's specifications. We are working to decrease our paper records by increasing our use of electronic records.

We compost our food waste as part of our gardening club. We have water butts that we use for our gardening clubs and we encourage people who use our gardening service to have water butts installed. We also train gardening club members on how to use water wisely in their gardens.

We support members of our clubs to join Dial a Ride which enables them to share journeys with others, whilst having their access needs met. We also encourage members who are coming by car to share journeys with each other. The administrators of our handyperson and gardening schemes work to keep jobs geographically close to each other, thus reducing petrol costs between journeys. We have strong links with Energy Solutions and refer members for help with insulation, draughtproofing and more efficient boilers.

We are a member of the West London Waste Authority re-ward scheme, and collect inkjet cartridges and postage stamps for recycling.



## 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 NEED AND HOW IT WAS ASSESSED Elders Voice works with over 1500 older people living in the London Borough of Brent. Through our consultation sessions, feedback forms, and informal conversations, we have discovered that older people would like to be more active in their local communities, but lack of confidence and accessible transport is often a barrier to participating. Currently, Elders Voice has 50 volunteers completing over 1800 hours of volunteering a year across its various projects including befriending, clubs and classes, gardening, day centres and general administration. We do not have a dedicated member of staff to help support these volunteers. This grant would allow us to employ a part-time volunteer development manager to co-ordinate volunteering within Elders Voice and to create a new volunteer drivers' project. It will allow us to increase the overall number of volunteers and the number of volunteers over the age of 65.

HOW WILL THE WORK BE DELIVERED? We will employ a paid volunteer manager for two and a half days per week to oversee the project. They will co-ordinate volunteering within Elders Voice; developing a congruent system for recruitment, support, training and monitoring of volunteers within Elders Voice. They will develop a marketing plan to target older volunteers from within the community. A new volunteer driving scheme will be developed which will co-ordinate a pool of volunteer drivers and volunteer escorts to support older people to attend our healthy living classes as well as cultural activities. A project steering group will meet regularly to monitor the progress of the project; to make sure it is reaching set targets and to ensure we are meeting the needs of older people.

WHAT WILL YOUR PROJECT AIM TO ACHIEVE?

\*To employ a Volunteering and Development Manager to co-ordinate volunteering across all projects within Elders Voice and manage our healthy living and cultural activities

\*To develop a volunteer driving pool to support older members and volunteers to attend clubs and classes

\*To recruit, train and support 25 volunteers to act as volunteer drivers, escorts, admin volunteers, and clubs and classes leaders/teachers

\* Volunteers will contribute 200 hours in the first year of the project, 300 hours in the second year, and 450 hours in the third year

\*To enable 125 older people to participate in healthy living and cultural activities

WHY ARE WE THE RIGHT ORGANISATION TO DELIVER THE WORK? Elders Voice is a well established and respected voluntary organisation with a successful track record of delivering quality services for older people living in Brent. We have been delivering healthy living projects in the community for 8 years and have recently received funding from the local council to deliver a healthy living project for the next two and a half years. We also have funding for another year of our Befriending Project. We are well known by older people in Brent as well as professionals within health and social services. We have recently refurbished our ClubHouse and created a warm, welcoming environment for our members through new decoration and furniture. We updated the building to make it more accessible for the needs of disabled people.

HOW WE MEET THE TRUST'S THEME: This project will meet the Trust's themes by enabling people over the age of 75 to lead healthier and more active lives through volunteering and attending our healthy living and cultural activities which will help to improve their mental and physical well-being as well as increase their social opportunities. We will also increase the number of older volunteers participating in our projects, focusing primarily on volunteer drivers who will enable less physically able older people to attend our clubs and classes. This will increase the number of older people becoming active volunteers in their community.

HOW WE MEET THE TRUST'S PRINCIPLES OF GOOD PRACTICE: A volunteer steering group will help to monitor the progress of the project which will include older volunteers from various backgrounds. Brent has one of the most culturally diverse populations in Britain with almost 70% of the population from ethnic minority groups. Elders Voice has a great deal of experience involving people from different communities in our projects.



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

We will demonstrate the measurable changes and benefits achieved during the project by gathering qualitative and quantitative data on volunteers and the older people participating in healthy living activities and cultural events. All volunteers complete a volunteer application form before they begin to volunteer. All volunteers' information will then be input onto our volunteer database which gathers information such as name, address, phone number, ethnicity, age, and disability. Volunteers complete regular timesheets and have individual/group supervisions at least twice a year (depending on how much they volunteer). The database records the number of hours volunteers work and the training they undertake. We will also measure the impact of volunteering through administering feedback questionnaires to volunteers after 6 months of volunteering and conducting telephone or in-person interviews with volunteers regarding their thoughts and feelings about the volunteering process as well as the benefits they have experienced due to volunteering. General data regarding clients will be input onto our database. Some of the information that will be gathered includes gender, age, disability and ethnicity. We will also record the classes older people attend through regular attendance sheets. Older people will also complete feedback forms twice a year, recording their thoughts on volunteer involvement in the project as well as the benefits they have felt following participating in clubs and classes. We will discuss this feedback in Steering Group meetings, Senior Management Team meetings and in reports to the Board of Trustees.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>40 volunteers and participants in Year 1, 50 in Year 2, and 60 in year 3</b>			
In which local authority is your organisation based? <b>Brent</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>Brent</b>			
At what address will the activity be located? <b>181 Mortimer Road, Kensal Green, London NW10 5TN</b>			
What age group will benefit? <b>50+, but concentrating on the over 65s</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British	<b>25</b>	Black - Caribbean	<b>35</b>
White - Irish	<b>10</b>	Black - African	<b>5</b>
White - Other (please describe) <b>various European</b>	<b>5</b>	Black - Other (please describe)	
Asian - Indian	<b>10</b>	Black - British	<b>5</b>
Asian - Pakistani	<b>5</b>	Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			
What proportion of the beneficiaries will be disabled people? <b>50%</b>			



## 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 £
Volunteer Manager (with on-costs)	34000	35020	36072	51000
Pension	2040	2100	2166	6306
Management/Overheads/Telephone etc	9000	5040	9550	27820
Marketing and Publicity	1200	1236	1272	3708
Volunteer expenses	9550	9786	10080	29366
<b>TOTAL</b>	<b>55740</b>	<b>57412</b>	<b>59140</b>	<b>172292</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

We are asking you for half the funding of a full time post and Henry Smith for the other half, with a slightly different focus on each half.

## 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 £
Volunteer Manager (with on-costs)	17000	17510	18036	52546
Pension	1020	1050	1083	3153
Management/Overheads/Telephone etc	4500	4635	4775	13910
Marketing and Publicity	600	618	636	1500
Volunteer expenses	4750	4893	5040	14683
<b>TOTAL</b>	<b>27870</b>	<b>28706</b>	<b>29570</b>	<b>86146</b>



## 20. Funding requested from the Trust (continued)

When will the funding be required? **ASAP**

Is the activity to continue beyond the period for which funding is requested?  
If so, how will it be resourced? **We will look for alternative funding sources during the third year**

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

### Declaration on behalf of applicant organisation

I, **Lisa Ehlers** (your name)

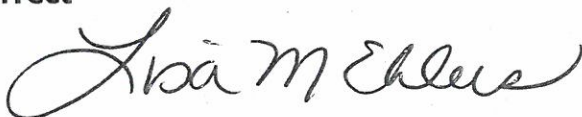
am an authorised representative of

**Elders Voice** (your organisation)

within which I am **Community Development Manager** (your position)

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

Signature



Date **5/3/13**

**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