

MEETING: 04/09/2013

Ref: 11530

ASSESSMENT CATEGORY - Older Londoners

Age UK Redbridge

Adv: Jenny Field

Base: Redbridge

Amount requested: £63,940

Benefit: Barking &

Dagenham

Amount recommended: £63,900

Purpose of grant request: To provide an Information and Opportunities Advisory Service to frailer older people and their families in Barking and Dagenham supporting them to live healthier lifestyles.

Background

Age UK Redbridge (AUKR) has had a presence in the borough for several decades. It incorporated as a charitable company in July 2001.

It provides a range of services for older people, including an Activity Centre providing lunch club, and a wide range of activities; an advice, information and advocacy service; an early intervention service for people with dementia and their carers; a falls prevention service; a hospital discharge scheme; and home care services.

Funding History

You have supported AUKR on two previous occasions, the latest grant being in June 2006, when you awarded £96,000 over three years (3 x £32,000) towards an advice and information service for older people in Redbridge. This grant ended in December 2009 and has been satisfactorily monitored.

Current Application

There has been no service-providing organisation for older people in LB Barking and Dagenham since 2009, when Age Concern Barking and Dagenham (ACB&D) closed. Age UK Redbridge has undertaken consultation with older people living in sheltered accommodation in Barking and Dagenham which has highlighted the need for access to local advice and information provision. As one resident said of ACB&D:

"We used to go there all the time for advice, to get help filling in benefit forms, to find out what was available to us, to find information on holidays, go to coffee mornings and events, etc. Now we have to travel as far as Havering to get some help and for some of us, that is too far."

Barking and Dagenham has areas of high deprivation and is ranked 11th highest deprived borough of all local authorities nationally. We have regularly reported to you the difficulties of attracting good applications from LB Barking Dagenham, a borough with considerable disadvantage and where the voluntary sector is less well developed than in some other boroughs.

To meet this need, AUKR proposes to develop an advice and information service in LB Barking and Dagenham through the employment of an Information and Opportunities Adviser for 30 hours per week, supported by volunteers. The proposed service would aim to maximise the income of older people through benefit checks, benefit applications, utility comparisons, etc. AUKR would aim to reach at least 425 older people annually, particularly targeting the over 75's. In the light of changes to benefits and health and social care provision, access to good quality advice and information is arguably needed more than ever.

Financial Observations

Audited accounts for the year ended 31st March 2012 show an overall surplus of £65,390 (8.6% of turnover), entirely on unrestricted funds.

The reserves target of AUKR's trustees is to hold 6 months' worth of expenditure as free reserves, which based on current year expenditure equates to £301,770. At 31st March 2012, free unrestricted reserves amounted to £370,784 equating to 7.4 months' worth of total current year expenditure.

Draft accounts for 2012/13 show an overall surplus of £8,657 (1.3% of turnover), comprising a surplus of £70,000 on restricted funds partially offset by a deficit of £61,343 on unrestricted funds. The charity has explained that the deficit was planned to enable the organisation to re-structure following a reduction of 25% in its local authority funding.

The budget for the current year 2013/14 shows income of £501,548, of which £376,043 (75%) has been confirmed, and, after expenditure of £603,538, a further deficit of £101,990. Of this, £35,000 will be met from restricted reserves and the remainder of £66,990 from unrestricted funds. This latest deficit, together with the prior year deficit of £61,343, will reduce free unrestricted reserves to £264,952, which equates to 5.3 months' worth of expenditure and below the target to hold 6 months.

Officer's Appraisal

As stated earlier, Barking and Dagenham is a borough of high need and a less well-developed voluntary sector. AUKR is in a good position to develop the proposed service in Barking and Dagenham which is clearly much needed by older people in the borough, whilst it is within its charitable objects to work in boroughs neighbouring Redbridge. Later in the year, AUKR and Age UK Havering will merge to form a new charity serving the boroughs of Redbridge, Barking and Dagenham and Havering.

Recommendation

£63,900 over two years (£32,400; £31,500) towards the salary (30 hours per week) of an Information and Opportunities Advisor to establish an advice and information service for older people in LB Barking & Dagenham.



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)

11530

Date Received:

3 Dec 12

Programme
Area:

5

1. About your organisation

Name of organisation applying for grant: Age UK Redbridge	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence 4th Floor 103 Cranbrook Road Ilford Essex	
Postcode: IG1 4PU Is this your home address? No	
Contact person: Mr Andy Petty	Position: Chief Executive of Age UK Redbridge
Phone: 0208 220 6000	Fax: 020 8478 4767
E-mail: andy.petty@ageukredbridge.org.uk	
Website: www.ageukredbridge.org.uk	
Legal status of organisation: Registered Charity & Co. Limited by Guarantee	
If registered, please give charity number: 1088435	
Year and month organisation established: November 2003	

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 provide an Information and Opportunities Advisory Service to frail older people and their families in Barking and Dagenham supporting them to live healthier lifestyles
How much funding is requested? Year 1: £32409 Year 2: £31531 Year 3: £ Total: £63940

3. Aims of your organisation

Age Concern Redbridge, now trading as Age UK Redbridge, was established in 1994 with the aim to promote the relief of older people in and around the London Borough of Redbridge.

We seek to improve and maintain the quality of life of older people by:

- 1) Ensuring that older people have dignity, respect, choice and their voices are heard;
- 2) Ensuring that services are provided in a sensitive and approachable manner
- 3) Being a focus of advice and help for older people.

4. Main activities of your organisation

Age UK Redbridge current activities include the provision of information and advisory services for older people and their carers, in addition to preventative services designed to empower older people and help them maintain their independence.

Specifically, we provide: advice, information and advocacy, early intervention service for people with dementia (and carers), falls prevention service, befriending, escorted hospital discharge, bathing, shopping and home care.

We offer an Activity Centre/lunch service with exercise classes, hobby and interest groups including IT training for older people.

Age UK Redbridge also has a large volunteering programme to support our services.

We have a specific user involvement programme('Voices of Experience'), to gather views on current and potential services to ensure we are meeting local needs. Regular consultation events ensure that our services are a priority for older people, and that they are appropriate, fit for purpose and provided in a sensitive and approachable manner.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4	19	8	120

6. How do you support your volunteers?

We have detailed volunteer policies and procedures and clear volunteer roles and responsibilities. We offer comprehensive induction, training, ongoing support and supervision. Volunteers have a named contact and access to our Volunteer Coordinator.

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	15 year lease

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	108,049
Activities for generating funds	55,790
Investment income	567
Income from charitable activities	599,923
Other sources	
Total Income	764,329

Expenditure:	£
Charitable activities	667,152
Governance costs	31,787
Cost of generating funds	
Other	
Total Expenditure	698,939
(Deficit)/surplus for the year:	65,390

Asset position at year end	£
Fixed assets	53,422
Investments	
Net current assets	370,784
Long-term liabilities	
*Total A	424,206

Reserves at year end	£
Endowment funds	
Restricted funds	
Unrestricted funds	424,206
*Total B	424,206

* 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?
65%

10. Material changes

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

Since the March 2012 accounts there haven't been any significant changes to the governance of the organisation. Since April 2011 we have traded as Age UK Redbridge and become the Age UK Brand Partner for Redbridge, Barking & Dagenham and Havering. Our statutory sector funding has been reduced by 25% in 2012-13 requiring a restructure. We have invested reserves to grow the business across the new geographical area.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Mar	/	2006	Ref: 7246	Grant received: £96000	OR application rejected	<input type="checkbox"/>
Month/Year: May	/	1999	Ref: 0036	Grant received: £20000	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: 2009	Year: 2010	Year: 2011
(i)			
(ii) London Borough of Redbridge	351977	316155	240127
(iii) London Councils	0	11335	11335
(iv) Redbridge PCT	161076	161076	284699
(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
Big Lottery	43074	43698
Mercers Co.		1300
Age UK		1500

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

We are currently based in leased premises in a multi-occupation building. When we moved to current premises we refurbished them completely and made improvements to our carbon footprint by ensuring we implemented the greenest lighting, etc systems we could. Our premises have double glazed windows throughout. The central heating system is operated to align with the building use and all radiators have individual controls. The stem is checked regularly and serviced every year. All windows open and offer a good system of ventilation requiring no airconditioning system. Over a number of years we have replaced all our monitors to flat screen ones to become more energy efficient. As well as recycling paper used we have a double sided printer for reducing the amount of paper wasted and we use paper purchased from responsible sources. We have discouraged the use of plastic cups by purchasing ceramic mugs and glasses. We do not offer parking spaces at our premises and staff are encouraged to use public transport.

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.

Meeting the Trust's Themes - The project will support people over 65, and particularly those over 75, in Barking and Dagenham, to access information, identify options and participate in activities that promote healthy lifestyles.

Need - Barking and Dagenham (B&D) is ranked the 11th highest deprived borough nationally; 5 of the borough's 17 wards are within the 10% most deprived in England, with 14 in the lowest 20%. The borough has 19,500 people aged 65+, with around 10,000 of those living with a long term illness, of which half (4,700) live alone. In addition, over 2,000 people in B&D are providing unpaid care to elderly relatives.

Since 2009 there has been no older people's organisation providing services in Barking and Dagenham, leaving a gap in age specific services. A proposed outline of local authority cuts is likely to see the economic and services situation worsen, in particular around guidance and advice. We consulted older people living in Barking and Dagenham sheltered schemes which highlighted this need. Residents aged 75+ in particular have missed out. "We used to go there all the time for advice, to get help with filling in benefit forms, to find out what was available for us, to find information on holidays, go to coffee mornings and events, etc. Now we have to travel as far as Havering to get some help and for some of us that is too far". This and similar comments by older people was backed up by professionals locally.

A lack of advice and guidance can leave older people "being cut off from services because they did not know what was on offer" (IPPR, Oct 2011).

How will it be delivered? Age UK Redbridge will deliver an "Information and Opportunities Project" to at least 950 older people in Barking and Dagenham (targeting those aged 75+) which will focus on tackling health inequalities and removing barriers to peoples' ability to enjoy healthy lifestyles e.g.:

- lack of information and knowledge (increasing awareness of opportunities available),
- financial barriers (through income maximisation enabling possibility of paying for services),
- social isolation (engagement and building confidence to use services), etc.

The service will be delivered by an Information and Opportunities Adviser (30 hrs over 5 days), supported by volunteers. Service users will be involved in the design and management of the service through participation in a steering group and regular feedback mechanisms. The service will also provide volunteering opportunities for 40 older people e.g. in accompanying other older people to activities and groups within the community.

The project aims to support active ageing in Barking and Dagenham, with a particular focus on those aged 75+ and their carers, tackling barriers to health and wellbeing such as social isolation and financial hardship. Key outcomes include:

- 1) Older people feel better informed, more confident and able to exercise choice in accessing services; Older people reporting improvements in their health and wellbeing,
- 2) Older people feel empowered to take control of their finances and exercise choice, increased income and reduced poverty for older people.
- 3) Older people participate and contribute as volunteers, with reduced social isolation.

Why Age UK Redbridge is the right organisation to deliver the work? Age UK Redbridge has a track record of partnership work in Barking and Dagenham and reputation for providing quality assured services that respond to local need. It's highly regarded user involvement programme ensures that older people are at the heart of service design and delivery.

Meeting Principles of Good Practice - Age UK Redbridge is committed to and meets the Trust's principles of Involvement, Valuing diversity and Reducing its Carbon Footprint (more detail in full application).

Job description for Information and Opportunities Adviser role is also attached.*

* on file

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

Monitoring methods and criteria will be dictated by a) Funders requirement b) Age UK Brand Partner requirements and c) organisational needs. Age UK Redbridge appreciates the value of meaningful monitoring and evaluation in maintaining and developing quality services. Data storage and analysis will mainly be electronic via the Charitylog system which is a fully web-based Contact Management System providing Charities with a single, unified and secure database. Standard format data also increases transparency and makes referrals and signposting very simple to monitor. All data is held securely in line with Age UK Redbridge confidentiality policy and Data Protection Act.

Evaluation will be based on a number of elements monitored including service uptake (numbers and demographics), number of information and advice sessions, income generation, referrals to activities promoting healthy lifestyles, number of older people taking up internal and external volunteering opportunities, client feedback and satisfaction. We will also collect case studies and record information on advice sessions including actions taken and client outcomes. We will have a line management system in place to supervise and support the Information and Opportunities Adviser delivering the project and oversee the running of the project. We will also directly involve older people in evaluating and developing the service through consultations, regular meetings and feedback request. Information gathered from complaints procedure will also be used as part of the in evaluation and monitoring of the project.

17. Beneficiaries

How many people will benefit from the grant per year? 425			
In which local authority is your organisation based? Redbridge			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Barking and Dagenham			
At what address will the activity be located? We are negotiating a lease in the Lemonade Building in Barking			
What age group will benefit? 65+with a focus on 75+			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	89	Black - Caribbean	
White - Irish	3.7	Black - African	
White - Other (please describe)	1.6	Black - Other (please describe)	
Asian - Indian	1.2	Black - British	2.5
Asian - Pakistani	0.8	Chinese	0.4
Asian - Bangladeshi	0.4		
Asian - Other (please describe)	0.4	Other (please describe)	
Open to everyone			Yes
What proportion of the beneficiaries will be disabled people? A high proportion of the client group (65+) would be considered to have a disability even if not formerly registered			

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 £
Capital costs	1000	0		1000
Recruitment	500	0		500
Salaries	26119	26641		52760
Operating costs	990	1010		2000
Accommodation	0	0		0
Staff and volunteer training/expenses	800	820		1620
Organisational overheads	3000	3060		6060
TOTAL	32409	31531		63940

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?

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 £
Capital costs	1000	0		1000
Recruitment	500	0		500
Salaries	26119	26641		52760
Operating costs	990	1010		2000
Accommodation	0	0		0
Staff and volunteer training/expenses	800	820		1620
Organisational overheads	3000	3060		6060
TOTAL	32409	31531		63940

20. Funding requested from the Trust (continued)

When will the funding be required? **February 2013**

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced? **As we have mentioned the project will be delivered from the Retail Hub as part of the partnership working with Age UK London. We anticipate that the income generated through the retail activities in the first two years will be reinvested in providing charitable services to older people in Barking and Dagenham which will include funding the Information and Advice Service after the first two years.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **None required**

Declaration on behalf of applicant organisation

I, **Andrew Petty** (your name)

am an authorised representative of

Age UK Redbridge (your organisation)

within which I am **Chief Executive** (your position)

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

Signature



Date **30/11/2012**

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