

MEETING: 04/09/2013

Ref: 11777

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

Down's Syndrome Association

Adv: Ciaran Rafferty

Base: Richmond

Amount requested: £81,635

Benefit: London-wide

Amount recommended: £81,700

Purpose of grant request: To assist young people with DS in the transition to adulthood, including from school or college into employment and from parental care to supported living.

Background

The Down's Syndrome Association (DSA) was established in 1973 and is the sole UK organisation focusing on every aspect of living with Down's syndrome (DS). DS is caused by the presence of an extra chromosome in a baby's cells and which occurs by chance at conception and is irreversible. It affects around one in every 1,000 babies born in the UK. People with DS are not ill and do not "suffer" from the condition though they will have a degree of learning difficulty. DSA provides information and support to parents; empowers and champions the rights of people with DS and campaigns against discrimination. There are over 100 local, affiliated, support groups throughout the UK.

Funding History

DSA has been funded by your Committee on two previous occasions, both with good outcomes. The first grant (£35,000) was in 2005 and was for two years' support of a project aimed at increasing integration in mainstream schools. The second grant, in 2008, was £68,300 for three years' support of older people with DS and who were suffering from dementia or Alzheimer's.

Current Application

This application (for a project called In Transit) is aimed at providing support to young people (typically aged 14 – 25 years) with DS who are at a stage of transition in their lives, particularly those moving from school or college into employment and/or from parental care into supported living. DSA has devised the project following analysis of its significant contact with people with DS and their families/carers; and with potential employers.

The organisation identifies the transition from child services to adult services as being typically problematic and fragile for young people – which is a message often repeated by other disability charities which you are funding. This project will target those who receive least support from

mainstream services but whose needs are nonetheless significant. Provision for the 16+ age group can be very variable across London. The first area of the support will most often focus on informing and supporting the parent(s) prior to the child's first Core Plan meeting at age 14. Individual and families will be able to access support via DSA's online services; or by direct support by trained volunteers or workers; or via the many local support groups that will be maintained and developed throughout London. Members of these groups will have the chance to meet regularly to share common issues, learning and best practice.

Financial Observations

Accounts for the year ended 31st March 2013 show a deficit of £94,642 (5% of turnover), which was due to the use of restricted funds received in prior years.

The reserves policy states that the organisation aims to hold free unrestricted reserves equivalent to between three to six months' worth of expenditure, which equates to between £484k and £967k. At the 31st March 2013, free unrestricted reserves stood at £737,790, which equates to 4.9 months' of 2013/14 expenditure and is within the target range.

The budget for the current year 2013/14 predicts a deficit of £18,889 (1% of turnover), which again relates to the spending of restricted funds received in prior years. Total income is forecast at £1.8m of which 38% has been confirmed to date. The organisation relies heavily on trading and voluntary income which, the charity explains, is received steadily throughout the year, and so the level of confirmed income at this stage is not unusual.

Officer's Appraisal

DSA is an inspiring organisation which typically receives less than 5% of its £1.8m turnover from statutory sources and which provides a wide range of services for people with Down's syndrome and their families and carers whilst constantly supporting their independence and inclusion in mainstream society. This project, based on evidenced need and professionally structured, will target key points of transition in a young person's life as they move to further education, employment, or supported care/adult services. It will provide relevant and important support to people living with DS and help them in their goal for greater and more meaningful independence.

Recommendation

£81,700 over three years (£26,400; £27,200; £28,100) for the costs of the *In Transit* programme for London.



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)

11777

Date Received:

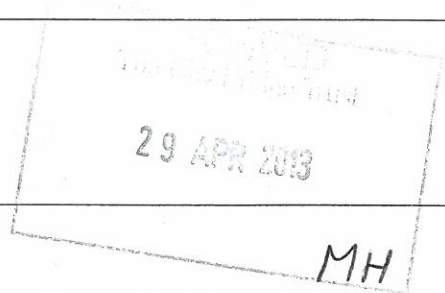
23/04/2013

Programme
Area:

06

1. About your organisation

Name of organisation applying for grant: Down's Syndrome Association	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence: Langdon Down Centre 2A Langdon Park Teddington	
Postcode: TW11 9PS Is this your home address? No	
Contact person: Ms Elaine Hart	Position: Trust Fundraiser
Phone: 020 86145100	Fax: 020 86145127
E-mail: elaine.hart@downs-syndrome.org.uk	
Website: http://www.downs-syndrome.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1061474	
Date organisation established: 11/06/1973	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Positive Transitions to Independent Living
Purpose for which funds are requested: (25 words maximum) To assist young people with DS in the transition to adulthood, including from school or college into employment and from parental care to supported living.
How much funding is requested? Year 1: £26,367 Year 2: £27,180 Year 3: £28,087 Total: £81,635

3. Aims of your organisation

Established in 1970, we are the only UK organisation focusing on every aspect of living with Down's syndrome (DS), from before birth to end of life. There are 60,000 people in the UK with DS, and 2 babies born with DS every day. We provide information and support; empowering people with DS and those closest to them. We champion their rights, campaign against discrimination and commit to improving awareness, knowledge and understanding of the condition. We create and develop the conditions that will enable people with DS to reach their full potential; leading semi-independent lives through inclusion in their communities.

4. Main activities of your organisation

We operate a 24hr National Helpline adopting an initial hand-hold approach to encourage independence and empower. Our portfolio of over 80 resources, written in a variety of formats, is often offered at no or nominal cost, ensuring accessibility for all. We provide nationwide learning and training opportunities to families, carers and professionals. We offer individual assessments; exploring a baby or child's social-emotional development and providing an independent view on the transition to adulthood. We are at the forefront of one of the most pressing issues facing service providers; providing support and care to an ageing population across a variety of settings. We are delivering WorkFit, a direct link between people with DS and employers and DSActive, providing a fair opportunity for people with DS to get involved in sports. We facilitate Down2Earth; providing a platform for adults with DS to discuss issues of importance to them and initiate change. We are user-driven; facilitating information exchange between our members via 115 regional, affiliated, parent-led, volunteer groups who, with our guidance, contribute to government policy at all levels.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
26	9	8	200

6. How do you support your volunteers?

All volunteers are recruited, inducted and trained thoroughly. Volunteers have access to supervision that acknowledges their individual contributions and successes. We encourage volunteers to access training provision facilitated by local councils for voluntary action, some of which is accredited. All volunteers receive repayment of expenses.

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?
Owned	N/A

8. Finance

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

Financial year ended - 31 Month: March

Year: 2013

Income received from:	£
Voluntary income	609,720
Activities for generating funds	477,765
Investment income	21,746
Income from charitable activities	730,422
Other sources	
Total Income	1,839,653

Expenditure:	£
Charitable activities	1,430,620
Governance costs	110,422
Cost of generating funds	393,378
Other	
Total Expenditure	1,934,420
Net (Deficit)/Surplus:	(94,767)
Other Recognised Gains/(Losses)	125
Net Movement in Funds	(94,642)

Asset position at year end	£
Fixed assets	1,348,910
Investments	894
Net current assets	892,535
Long-term liabilities	
*Total A	2,242,339

Reserves at year end	£
Endowment funds	
Restricted funds	1,486,323
Unrestricted funds	756,016
*Total B	2,242,339

* 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?
<5%

10. Material changes

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

None

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				
Month/Year: (1 10/08	Ref: 9079	Grant received: £68,300	OR application rejected?	No
Month/Year: 07/06 05/05	Ref: 6068	Grant received: £35,000	OR application rejected?	No
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: 2010	Year: 2011	Year: 2012
(i)	N/A			
(ii)	N/A			
(iii)	N/A			
(iv)	N/A			
(v)	Department of Health, Social Services & Public Safety	35,045	35,045	35,045
	Welsh Assembly	43,000	43,000	40,850
	Western Education and Library Board and North Eastern Education and Library Board	219	631	1,368
(vi)	Welsh Council for Voluntary Action		4,868	18,499
	Arts Council			4,434

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
Sylvia Adams Charitable Trust		50,000
Zochonic Charitable Trust	10,000	10,000
Platinum Trust	12,750	12,750
Equitable Charitable Trust		10,000
John Ellerman Foundation	40,000	
Grants of £8,000 or less	57 at total £90,497	50 at £77,409

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

<p>We successfully applied to take part in a City Bridge Trust supported environmental audit; which led to us implementing various DSA Environmental Policies (copies available on request) and undertaking environmental awareness training. We are pleased to report a significant drop in carbon emissions as a result.</p> <p>To ensure maximum effectiveness, we successfully secured the buy-in of all staff and trustees. Existing staff have been trained on these principles, new staff receive environmental awareness training as part of their induction. We expect all staff to adhere to the Association's Environmental Policies.</p> <p>The strategic aims and objectives of the DSA were rewritten to include strategic aim 8: Become an ecologically aware charity.</p> <p>Objectives:</p> <ul style="list-style-type: none"> • Reduce our overall environmental impact • Implement an Environmental Management System • Reduce emissions and save costs

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.

113
Transition from child services to adult services is typically problematic and notoriously fragile; particularly when approaching Further Education (FE) and employment. Young people with DS require greater support in understanding and developing their identity, sexuality and relationships; age appropriate behaviour; independence; employment; money skills; using public transport. Our client group tell us that they are overwhelmed and receive limited professional guidance to help them make an informed choice. Poor support and provision can have disastrous effects on the individual's self esteem and mental well-being. Comprehensive support reflecting up to date legislation in education, health, welfare services and social care is required to ensure people with DS realise their potential and live meaningful, semi-independent lives.

This project targets those who receive the least support from mainstream services. We expect to reach approximately 700 people per year, aged 14 -25 years with DS, living in Greater London. DS can happen to anyone, regardless of age, ethnic background, social class or country. Our culturally sensitive approach will ensure we reach those not already part of our established network.

This project will; improve the transition experience from school to college and assist college leavers to access employment; provide individual advice to young people with DS and their families who are undergoing transition from the parental home to supported living; provide a forum for young people with DS and their families to share experiences, explore emotions and identify best practice in the route to successful transition, and produce a health check book for adults.

No other organisation provides such high level, condition-specific support; addressing every aspect of the transition from childhood to adulthood.

Via our helpline, we will provide a wide range of information, advice and support to those who are about to, or are involved in, change from one environment to another. We will address every aspect of accessing and maintaining independent living and planning for the future; entitlement to educational assessments; legally-based FE advice; welfare benefits advice; transport; disability discrimination; housing and health issues. WorkFit will provide a direct link between people with DS and employers. Down2Earth will provide an essential platform for people with DS to discuss issues of importance to them and encourage meaningful participation in the local community.

We will host an annual, full day learning and networking opportunity for parents of young people with DS aged 14-25 years and the professionals involved in their care and future planning, and an Information Exchange Day for local support groups.

This exciting, multifaceted project will assist young disabled people with the transition to adulthood - specialist work that will result in more disabled people reporting increased choice and control in their lives; successfully living independently; taking up educational or employment opportunities and making positive choices about their lives. We appeal to your interest in sustaining young people through some of the hardest transitions and challenges they will face; managing the move from school or college into employment and from parental care to supporting living.

Our accessible planning and evaluation models will ensure people with DS are involved in the project's direction and execution. We are a user-driven organisation promoting and facilitating information exchange between our members via 115 regional, affiliated, parent-led, volunteer groups who, with our guidance, contribute to government policy at all levels. Our Trustees are service users, or have DS themselves. We harness the valuable commitment of volunteers to further our aims. We successfully applied to take part in a City Bridge Trust supported environmental audit; which led to us to implementing various policies; revising our strategic aims to include 'become an ecologically aware charity' and undertaking environmental awareness training.

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

We will conduct comprehensive regular reviews of our achievements set against our aims. Helpline monitoring software will trace the volume, complexity and length of calls received; we will also trace website traffic similarly. Our individual advice sessions will be recorded and evaluated. Our WorkFit placements will be regularly reviewed. Our health passport will undergo a pilot that will be thoroughly evaluated to finalise the product; once disseminated, we will actively request feedback from passport users. We always have real case studies that we can draw upon.

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?			
700			
What age group will benefit? Adult, over 16 years, over 11 years			
In which local authority is your organisation based?			
Richmond			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each)			
We will benefit young people with DS from across all London boroughs; City of London and postcodes KT, SM,CR,IG,EN,WD,HA,BR,DA,TW and UB.			
At what address will the activity be located?			
We will base the project's activity from our national office in Teddington.			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	93	Black - Caribbean	
White - Irish	2	Black - African	1
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian	1	Black - British	2
Asian - Pakistani	1	Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			100
What proportion of the beneficiaries will be disabled people?			
100%			

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 £
Education Information Officer (time spent 10%)	3,244	3,325	3,425	9,994
Information Officer (time spent 7.5%)	2,442	2,503	2,578	7,523
Employment Development Officer (time spent 15%)	4,438	4,549	4,685	13,672
Welfare Benefits Officer (7.5%)	2,566	2,630	2,709	7,905
Telephone and email	1,500	1,500	1,500	4,500
Postage	1,000	1,030	1,061	3,091
Stationery	500	510	515	1,525
Down2Earth	4,000	4,200	4,410	12,610
Resources	3,000	3,150	3,308	9,458
Conference	640	656	672	1,968
Information Exchange Day	640	656	672	1,968
Management and administration	2,397	2,471	2,553	7,421
TOTAL	26,367	27,180	28,088	81,635

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
This is our first application, tailored to City Bridge Trust.				
TOTAL				

What other funders are currently considering the proposal?

Funder	£
This is our first application, tailored to City Bridge Trust.	
TOTAL	

19. Funding requested from the Trust

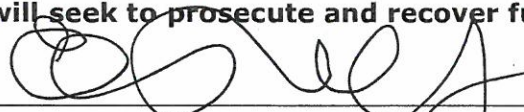
How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Education Information Officer (time spent 10%)	3,244	3,325	3,425	9,994
Information Officer (time spent 7.5%)	2,442	2,503	2,578	7,523
Employment Development Officer (time spent 15%)	4,438	4,549	4,685	13,672
Welfare Benefits Officer (7.5%)	2,566	2,630	2,709	7,905
Telephone and email	1,500	1,500	1,500	4,500
Postage	1,000	1,030	1,061	3,091
Stationery	500	510	515	1,525
Down2Earth	4,000	4,200	4,410	12,610
Resources	3,000	3,150	3,308	9,458
Conference	640	656	672	1,968
Information Exchange Day	640	656	672	1,968
Management and administration	2,397	2,471	2,553	7,421
TOTAL	26,367	27,180	28,088	81,635

20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;">01/09/2013</p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Support at this stage has a significant impact on delivery at the required level. Your generous support will inspire others, and together with our continued active approach in seeking funding, we will be able to continue to deliver an accessible service that will exist for as long as there is a continuing need.
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, <u>EVANNE HART</u> (your name)
am an authorised representative of <u>DOWNS SYNDROME ASSOCIATION</u> (your organisation)
within which I am <u>TRUST FUNDRAISER</u> (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  Date <u>2604 2013</u>

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