

MEETING: 28/11/2013

Ref: 12005

ASSESSMENT CATEGORY - Older Londoners

Vitalise

Adv: Julia Mirkin

Amount requested: £51,000

Base: Islington

Benefit: London-wide

Amount recommended: £51,000

Purpose of grant request: To provide breaks with care for older Londoners with Alzheimer's disease and their Carers, to help improve the quality of their lives.

Background

Jubilee Lodge is in Chigwell, Essex, and is one of three fully accessible care centres managed by Vitalise, the charity originally known as Winged Fellowship Trust. For twelve weeks per year, Vitalise reserves use of its centres for people with Alzheimer's and their Carers, three weeks of which are offered at Jubilee Lodge. All Vitalise centres are registered with the Care Quality Commission to offer personal and nursing care. Friendly and practical support is offered by fully trained volunteers.

In 2012/13, Vitalise froze the price of a week-long break to increase affordability for beneficiaries, many of whom are experiencing financial pressure as a result of social care spending cuts. At the same time, it undertook refurbishments at all its centres, to better equip guests and ensure visitors are getting good value for money.

Funding History

Vitalise has received two grants from CBT, in 2002 and in 2007. The most recent grant was for £93K over three years and funded volunteering opportunities for older people. Monitoring of this grant was rated as good.

Current Application

This application is to help provide breaks with care for older Londoners with Alzheimer's disease and their Carers. While their loved ones are offered 24-hour care, Carers are free to participate in excursions and centre-based activities. This allows Carers to have a complete break and to rekindle family relationships. 93% of Alzheimer's week guests report that Vitalise breaks allow them to 'improve or maintain their quality of life'. 67% of guests report that they 'feel closer to their Carer'; 75% of Alzheimer's week guests are repeat visitors.

20 beneficiaries per year (approximately seven per week) will be supported during three dedicated Alzheimer's weeks at Jubilee Lodge, of which it is estimated 50% will also have disabilities. Each guest is assigned a named nurse, care worker and volunteer and will receive 24-hour care on call during their stay.

Due to the proximity of Jubilee Lodge to London, it is estimated that one third of guests during Alzheimer's week will be Londoners and these would be the beneficiaries of this application. The total cost of offering three dedicated Alzheimer's weeks at Jubilee Lodge for three years is £360,395. Vitalise anticipates raising income of £207,082 from fees, leaving a fundraising target of £153,313 of which one third is now sought from your Committee.

Financial Observations

Audited accounts for the year ended 31 January 2013 show an overall deficit of £3,199,000 (44% of turnover), comprising £3,062,000 on unrestricted funds and £137,000 on restricted activity. The overall deficit comprised 3 main elements:

1. During the year the charity decided to state the value of its interests in freehold and leasehold property at current market valuations, a change from the previous carrying values which were based on cost less depreciation. This revaluation resulted in a total impairment of £2.8m;
2. Operating activities incurred a deficit of £209k (2.8% of turnover) and the charity advises that this was due to renovation costs and because Vitalise did not increase its fees, as a charitable gesture in response to the current economic climate; and
3. The charity has explained that the remaining deficit for the year was due to restructuring costs amounting to £180k.

Vitalise's reserves policy requires a total free unrestricted reserves holding of £2,926,000, which equates to 4.4 months' worth of 2013/14 budgeted expenditure. At 31 January 2013 free unrestricted reserves were below this target at £1,894,000 equating to 2.9 months' worth of current year expenditure.

The latest forecast for 2013/14 shows total income of £7,959,000, of which £5,398,490 (68%) has been confirmed as at 31 October 2013. After budgeted expenditure of £7,908,000, a small surplus of £51,000 (0.6% of turnover) on unrestricted funds is forecast.

Officer's Appraisal

Vitalise is offering high quality residential care for Alzheimer's sufferers and their Carers, which aims to reconnect family relationships. The organisation is unique in its accommodation of Carers' needs. As well as subsidising each Alzheimer's guest's visit, Vitalise has introduced measures to try and make its care affordable and good value for its guests, which, hopefully, enables both Alzheimer's sufferers and their Carers to attend.

Recommendation

£51,000 over three years (£17,000; £17,000; £17,000) towards running costs for Jubilee Lodge and related core costs for Vitalise.



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)

12005

Date Received:

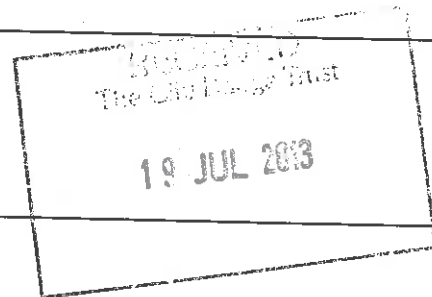
19/07/13

Programme
Area:

5

1. About your organisation

Name of organisation applying for grant: Vitalise	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence 212 Business Design Centre 52 Upper Street London	
Postcode: N1 0QH Is this your home address? No	
Contact person: Select Title Miss Andrea Mills	Position: Trust Fundraiser
Phone: 020 7288 6877	Fax: 0207 288 6899
E-mail: amills@vitalise.org.uk	
Website: www.vitalise.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 295072	
Year and month organisation established: April 1963	



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 breaks with care for older Londoners with Alzheimer's Disease and their carers, to help improve the quality of their lives.
How much funding is requested? Year 1: £17,000 Year 2: £17,000 Year 3: £17,000 Total: £51,000

3. Aims of your organisation

Everybody deserves a break. Living with a disability – or caring for someone who does – means facing enormous challenges on a daily basis. Our primary aim is to provide essential and unique breaks with care for people with physical disabilities and/or dementia, and their carers. Volunteers are essential to the delivery and sustainability of our services and we also aim to consistently provide inspiring opportunities for volunteers.

4. Main activities of your organisation

Vitalise has welcomed many thousands of guests to its fully accessible Centres, offering invaluable breaks to carers and adults with an enormous range of disabilities including cerebral palsy, multiple sclerosis, strokes, spina bifida and Alzheimer's.

Our Centres – Jubilee Lodge in Chigwell Essex, Netley Waterside House in Southampton, and Sandpipers in Southport – are all registered with the Care Quality Commission to provide personal and nursing care. It is this capability to combine social and nursing care which is the foundation for all the important holiday-style 'extras' that further differentiate the charity from more conventional forms of respite care. This service is the core of our charitable work and at the very root of our beginnings in 1963. Vitalise exists because we believe that everyone deserves a break. We offer imaginative trips and excursions, great entertainment and constant opportunities for friendship, companionship and interaction.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
141	75	12	2000

6. How do you support your volunteers?

Volunteers are provided with induction/training, covering the emotional and practical elements of their role. Residential volunteers are offered lodgings, UK travel expenses and all meals. We present Volunteer Awards and thank you packs.

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?
Jubilee Lodge is owned.	N/A

8. Finance

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

Financial year ended -

Month: **January**

Year: **2012**

Income received from:	£
Voluntary income	1,210,000
Activities for generating funds	832,000
Investment income	20,000
Income from charitable activities	5,764,000
Other sources	6,000
Total Income	7,832,000

Expenditure:	£
Charitable activities	6,807,000
Governance costs	21,000
Cost of generating funds	890,000
Other	
Total Expenditure	7,718,000
(Deficit)/surplus for the year:	114,000

Asset position at year end	£
Fixed assets	6,880,000
Investments	42,000
Net current assets	2,542,000
Long-term liabilities	(250,000)
*Total A	9,214,000

Reserves at year end	£
Endowment funds	
Restricted funds	994,000
Unrestricted funds	8,220,000
*Total B	9,214,000

* 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?
4%

10. Material changes

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

We recently decided to cease our Vitalise Holiday services for visually impaired people in order to invest more resources in our core centre break provision. We continue to investigate other forms of non centre breaks that could be of benefit to adults with disabilities.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: Aug	/ 2007	Ref: 8045	Grant received: £93000	OR application rejected	<input type="checkbox"/>
Month/Year: Oct	/ 2002	Ref: 3133	Grant received: £75000	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) n/a	0	0	0
(ii) n/a	0	0	0
(iii) n/a	0	0	0
(iv) Essex County Council	£137,000	£137,000	£137,000
(v) n/a	0	0	0
(vi) n/a	0	0	0

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
Newlands Fund	£125,000	£125,000
The Roger De Haan Trust	£100,000	£100,000
The Goldmark Trust	£0	£100,000
John Ellerman Foundation	£40,000	£40,000
The Royal Air Force Benevolent Fund	£30,000	£10,000
Grants £20,000 and under	£326,397	£320,648

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

12
Vitalise wishes to lead by example in the adoption and implementation of practices that contribute to improving, sustaining and minimising damage to the environment. Our charity has an up to date Environmental Policy, which prioritises:

- Minimising waste
- Sustainable Transport
- Water Consumption
- Energy Consumption

Vitalise continually seeks to improve its environmental performance at all sites and to ensure compliance with environmental legislation and approved Code of Practice. Vitalise will continually raise awareness and encourage participation of its entire staff through effective communication and training.

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 for the project

There are an estimated 820,000 people in the UK with Alzheimer's and dementia, a figure that is expected to rise to over one million by 2025. The impact of dementia is truly devastating for all concerned – most poignantly for the partner of the sufferer. For twelve weeks each year, Vitalise reserves all three of its centres for this very special group of people, addressing the need to provide a safe, harmonious environment for people with Alzheimer's and dementia and their carers - allowing the carer a crucial break from the strain of intense day to day physical and emotional support. Our ground-breaking Alzheimer's Weeks are fully booked in advance and demand for this unique Vitalise service has never been greater.

How the work will be delivered

Our application is focused on support for older Londoners with Alzheimer's and dementia, at our nearby Jubilee Lodge Centre in Chigwell, Essex. Currently, older Londoners represent at least a third of Alzheimer's Week guests at Jubilee Lodge and support from the Trust will help us continue to provide 3 dedicated Alzheimer's Weeks each year for this very special group of people and their carers. Each week will begin with a carer's meeting - a valuable opportunity for new visitors to be reassured about the support they will receive and to share experiences with returning carers. Each guest and carer will be allocated a named nurse, care worker and volunteer to provide all levels of support throughout their stay. Our fully trained Alzheimer's nursing staff will take over the usual caring responsibilities – washing, dressing, cooking, lifting, cleaning, going to the bathroom – allowing people with Alzheimer's and their carers the opportunity to reconnect as husband and wife, or parent and child, brothers and sisters, without the demands of care getting in the way: "Knowing Dad is safe and happy really makes a difference. At Vitalise I get to be his daughter again, instead of his carer – it's a wonderful feeling" (a recent beneficiary of a Vitalise Alzheimer's Week).

Each beneficiary will receive 24-hour care on call, Alzheimer's trained staff, seven nights' accommodation, stimulating events and activities, evening entertainment, three meals a day, use of all facilities and amenities in the centre and in some cases return transport. Please see the enclosed, fuller proposal for more detailed information.

Why Vitalise is the right organisation to deliver this work

Vitalise has been supporting families coping with disability for five decades and a grant from City Bridge Trust will help us continue to improve the lives of older Londoners with Alzheimer's and dementia and their carers. Vitalise has a wealth of experience and best practice to share with other organisations working in this area: in 2012, Vitalise became a member of the Dementia Action Alliance (DAA). This alliance is made up of organisations from across the charity, public and private sector committed to radically improving the quality of life of people living with dementia in the UK and the millions of people who care for them.

Our organisation also meets the Trust's Principles of Good Practice by involving older people in the delivery of our services. In 2007-2010, the Trust generously provided funding towards our work with older volunteers and we are pleased to report they continue to play a key role at Vitalise. Last year 59 volunteers aged over 60 provided 299 weeks of support across our three centres.

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

Vitalise measures guest satisfaction assiduously and has taken enormous strides in building user feedback into the development of services we offer. Over the past twelve months we have gathered information from our guests in several ways. These include a questionnaire which is completed at the end of each break, a website forum enabling guests to comment on all our ideas, and guest focus groups researching difficulties faced by people with specific disabilities including Alzheimer's and dementia. This ensures that we can evaluate our Alzheimer's breaks and continue to improve the service that we offer to guests and carers to ensure that their needs are fully catered for

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? **20**

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

In which local authority is your organisation based?
Islington

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
The service is open to older people from all London Boroughs.

At what address will the activity be located? **Jubilee Lodge, Grange Farm, High Road, Chigwell, Essex, IG7 6DP**

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

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			100

What proportion of the beneficiaries will be disabled people?
50%

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 £
Centre costs	81,499	89,622	98,720	269,841
Central Admin	14,491	15,215	15,976	45,682
Reservations	4,544	4,764	5,002	14,310
Volunteers	2,905	3,207	3,367	9,479
IT	882	926	972	2,780
Marketing	5,529	6,082	6,691	18,302
TOTAL	109,850	119,816	130,729	360,395

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Guest Fees	68,292	68,292	68,292	204,876
Other restricted income	235	235	235	706
Other Income	500	500	500	1,500
TOTAL	69,027	69,027	69,027	207,082

What other funders are currently considering the proposal?

Funders	£
No other funders at present are considering our appeal for older Londoners with Alzheimer's and dementia	
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 £
Centre costs	12,750	12,750	12,750	38,250
Central Admin	2,040	2,040	2,040	6,120
Reservations	680	680	680	2,040
Volunteers	510	510	510	1,530
IT	170	170	170	510
Marketing	850	850	850	2,550
TOTAL	17,000	17,000	17,000	51,000

20. Funding requested from the Trust (continued)

When will the funding be required? December 2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Vitalise is committed to the continued support of older Londoners with Alzheimer's and dementia and their carers. We will continue to make applications to relevant grant makers and use unrestricted funding to cover any shortfall.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? N/A

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee
Name: Mr Matthew Dear
Organisation: Merchant Taylors Company
Address: Merchant Taylors Hall 30 Threadneedle Street London EC2R 8JB
Tel: 020 7 450 4440
E-mail: mdear@merchant-taylors.co.uk

Declaration on behalf of applicant organisation

I, **Andrea Mills** (your name)

am an authorised representative of

Vitalise (your organisation)

within which I am **Trusts Fundraiser** (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 **5 July 2013**

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

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