

# The City Bridge Trust

## Investing In Londoners: Application for a grant



### About your organisation

Name of your organisation: <b>Age UK Merton</b>	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? <b>Merton</b>	
Contact person: <b>Mrs Charmaine Bennett</b>	Position: <b>Chief Executive</b>
Website: <a href="http://www.ageukmerton.org.uk">http://www.ageukmerton.org.uk</a>	
Legal status of organisation: <b>Registered Charity</b>	Charity, Charitable Incorporated Company or company number: <b>1105384</b>
When was your organisation established? <b>01/01/1961</b>	

### Grant Request

Under which of City Bridge Trust's programmes are you applying? <b>Older Londoners</b>
Which of the programme outcome(s) does your application aim to achieve? <b>Older Londoners aged 75 years and over living more active and healthier lives Fewer older Londoners aged over 75 years with depression and more reporting improved well-being</b>
Please describe the purpose of your funding request in one sentence. <b>Specialist help for older people with long-term health conditions to lead healthier and more active lives and remain connected with their community.</b>
When will the funding be required? <b>01/07/2014</b>
How much funding are you requesting? Year 1: <b>£51,527</b> Year 2: <b>£52,583</b> Year 3: <b>£54,039</b>  <b>Total: £158,149</b>

**Aims of your organisation:**

Age UK Merton is an independent local charity supporting older people and their carers in and around the London Borough of Merton. We exist to improve the quality of life of older people.

**Main activities of your organisation:**

Our services include-

- An Activity and Social Centre offering a wide variety of groups e.g. exercise, craft and art classes, complementary therapy and special interest groups (e.g. gardening, sewing, scrabble).
- A Handyperson for those who need help with small DIY tasks.
- Gardening to maintain and improve gardens.
- Help at home including cleaning
- Podiatry for those not entitled to limited NHS provision
- Information and advice about concerns including social care, local information, welfare benefits and well-being.
- Coordination of an annual "Celebrating Age" festival, working with a wide range of other organisations across the borough to put on a month-long range of hundreds of activities for older people, attended by 6,000 older people a year. Events include fun social activities alongside learning, health and cultural events.
- Advocacy and campaigning on behalf of older people at all levels
- A specialist support service for those who have had a stroke and those who have continence problems.

**Number of staff**

Full-time:	Part-time:	Management committee members:	Active volunteers:
<b>3</b>	<b>11</b>	<b>8</b>	<b>60</b>

**Property occupied by your organisation**

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
<b>Leased</b>	<b>No end date (council building)</b>

## Summary of grant request

### Need

Our experience shows many older people with long-term health conditions are isolated and feel disengaged. Loneliness is recognised as significantly contributing to further health deterioration.

Local health data shows stark inequalities- e.g. life expectancy in East Merton is considerably less than West -- (9 years-men /13 years- women.)

Our 2013 consultation with older people using other AUKM services (average age 85) highlighted many no longer went anywhere other than home or a Day Centre. 70% reported loneliness, 75% live alone and 66% had mobility problems presenting a further barrier. Income deprivation affecting older people data shows 8 areas in East Merton in the 20% most deprived in the country with none in the west. Older people in the east are significantly more likely to be in poorer health.

### Delivery

A specialist Health and Wellbeing Officer will assess each person's individual needs (usually in their own home) and offer information, advice and emotional and practical support to overcome barriers and help people lead more active and healthier lives in the community. The staff member, supported by Occupational Therapy students, will then connect older people who need ongoing support with local community activities that interest them and continue to support them to work through the actions agreed and help build their confidence.

### Aims

The project aims to achieve improved wellbeing, quality of life and community engagement for older people with long term health conditions. We aim to address barriers that have prevented older people from accessing activities and services in the community, so enabling them to lead healthier and more active lives.

### Why AUKM?

This project strategically extends our service development, building an empowering and preventative approach to health and wellbeing and helping people in a way that meets their individual needs and aspirations. In 2013 we developed health programmes for those who have had a stroke and those with continence problems. This funding request extends the work to any older person with long term illness and increases capacity through enlarging the team of staff and capacity to support Occupational Therapy students.

This project is available for those who need it across Merton but our location in the most deprived area enables targeting for those most likely to suffer ill health. AUKM is prominent locally and has existing excellent links across the voluntary and statutory sector to support development of this programme.

### Meeting programme outcomes

The individualised approach is designed to maximise success and achieve positive outcomes to enable people aged over 75 to lead more active and healthier lives. Solution-focussed action plans will identify ways to overcome physical, emotional, financial and psychological barriers to activity and healthier living that face people experiencing long term health conditions. The specialist worker and students provide one-to-one help to work through and achieve the individual's aims so they can become more active and healthier. Older people will report improved wellbeing as they become less isolated and more active with the resultant improvement in mood, physical and emotional health.

### Meeting 'Principles of Good Practice'

The majority of our Board and volunteers are older people. Volunteers are involved in all aspects of AUKM, including running services. Those involved in AUKM come from a wide variety of backgrounds and we work to ensure our activities reflect different interests and backgrounds. We have 82 active volunteers and an extremely high retention rate. We offer volunteers support and training, listen to and act on their suggestions and value their individual skills -- e.g. starting a sewing group recently. We take steps to reduce our carbon footprint e.g. recycling, reusable crockery rather than disposable and use of electronic communication.

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

**Not applicable**

Do you have a Vulnerable Adults policy? **No**

What Quality Marks does your organisation currently hold?

### Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

**215 Personal Health and Wellbeing Action Plans for older people with long term health conditions produced and implemented.**

**860 One to One interventions for information, advice and support (face to face & telephone) .**

**20 talks to community groups to promote the service and raise awareness of support available with staff, volunteers and service users.**

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

**129 older people with long term health problems, who we have supported with a personal Health and Wellbeing Action Plan, report increased happiness.**

**172 older people with long term health problems, who we have supported with a personal Health and Wellbeing Action Plan, report increased levels of activities / community participation.**

**172 older people with long term health problems, who we have supported with a personal Health and Wellbeing Action Plan, report improved health and wellbeing and 22 report maintained health and wellbeing.**

**40 staff/volunteers in other organisations in the community and 120 service users of other community organisations will be more aware of services available to support the health and wellbeing of older people in Merton.**

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

**Health programmes are part of our long-term planning. We have funding from the Local Authority for a part of the programme and hope that this will not only continue but expand when the next round of funding is available in 2016. We aim to demonstrate positive health outcomes and attract interest from local health services.**

## Who will benefit?

### About your beneficiaries

How many people will benefit directly from the grant per year?

**230**

In which Greater London borough(s) or areas of London will your beneficiaries live?

**Merton (100%)**

What age group(s) will benefit?

**75 and over**

What gender will beneficiaries be?

**All**

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

**A range of ethnic groups**

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

**21-30%**

## Funding required for the project

**What is the total cost of the proposed activity/project?**

Expenditure heading	Year 1	Year 2	Year 3	Total
Health Programmes Manager - 5 hrs pw - salary, pension, ENI	4,228	4,355	4,485	13,068
Health Programmes Officer- 37.5 hpw- salary, pension, ENI	29,916	30,813	31,738	92,467
Recruitment and HR support	1,110	115	120	1,345
Student Expenses	520	535	550	1,605
FCR-management/ finance/ admin overhead staff costs	8,840	9,105	9,378	27,323
FCR - organisational overheads- eg premises costs, insurance, audit	5,533	5,699	5,870	17,102
DBS costs	50	0	0	50
Promotional printing / website, resources	400	300	200	900
Staff training, travel, mobile phones, computer, IT support and desk/chair	3,125	1,661	1,698	6,484
<b>TOTAL:</b>	<b>53,722</b>	<b>52,583</b>	<b>54,039</b>	<b>160,344</b>

**What income has already been raised?**

Source	Year 1	Year 2	Year 3	Total
Donation of desk and chair	500	0	0	500
	0	0	0	0
	0	0	0	0
	0	0	0	0
<b>TOTAL:</b>	<b>500</b>	<b>0</b>	<b>0</b>	<b>500</b>

**What other funders are currently considering the proposal?**

Source	Year 1	Year 2	Year 3	Total
none	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**How much is requested from the Trust?**

Expenditure heading	Year 1	Year 2	Year 3	Total
Health Programmes Manager -5 hrs pw - salary, pension, ENI	3,753	4,355	4,485	12,593
Health Programmes Officer- 37.5 hpw- salary, pension, ENI	29,916	30,813	31,738	92,467
Recruitment and HR support	1,110	115	120	1,345

Student Expenses	0	535	550	1,085
FCR - management/ finance/ admin overhead staff	8,540	9,105	9,378	27,023
FCR - organisational overheads- eg premises costs, insurance, audit	5,333	5,699	5,870	16,902
DBS costs	50	0	0	50
Promotional printing / website, resources	200	300	200	700
Staff training, travel, mobile phones, computer, IT support and desk/chair	2,625	1,661	1,698	5,984
<b>TOTAL:</b>	<b>51,527</b>	<b>52,583</b>	<b>54,039</b>	<b>158,149</b>



## Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month: <b>March</b>	Year: <b>2013</b>
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Income received from:	£
Voluntary income	61,642
Activities for generating funds	0
Investment income	1,697
Income from charitable activities	396,035
Other sources	0
<b>Total Income:</b>	<b>459,374</b>

Expenditure:	£
Charitable activities	438,762
Governance costs	36,044
Cost of generating funds	0
Other	0
<b>Total Expenditure:</b>	<b>474,806</b>
<b>Net (deficit)/surplus:</b>	<b>-15,432</b>
<b>Other Recognised Gains/(Losses):</b>	<b>1,852</b>
<b>Net Movement in Funds:</b>	<b>-13,580</b>

Asset position at year end	£
Fixed assets	6,897
Investments	27,984
Net current assets	316,157
Long-term liabilities	-65,622
<b>*Total Assets (A):</b>	<b>285,416</b>

Reserves at year end	£
Restricted funds	36,809
Endowment Funds	0
Unrestricted funds	248,607
<b>*Total Reserves (B):</b>	<b>285,416</b>

\* Please note that total Assets (A) and Total Reserves (B) should be the same.

### Statutory funding

For your most recent financial year, what % of your income was from statutory sources? 51-60%
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### Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:  During 2013-14 a new CEO and new Chair of Trustees came into post. Our funding from the local authority in 2013-14 remains at a similar level but is targeted at a more preventative approach to services and no longer at funding a Day Centre, which closed in September 2013. We have integrated former day centre users into other services.
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### Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.

	2012 £	2013 £	2014 £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	281,227	193,271	237,454
London Councils	0	0	0
Health Authorities	5,000	5,000	5,000
Central Government departments	0	0	0
Other statutory bodies	0	0	0

### Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	2012 £	2013 £	2014 £
Lloyds TSB Foundation	0	12,000	0
Age UK	7,286	63,876	27,312
Wilkinsons Charity Funds	0	4,000	0
	0	0	0
	0	0	0

### Declaration

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

Please confirm: Yes      Full Name: **Charmaine Bennett**

Role within                      **Chief Executive**  
Organisation: