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The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Age UK Lewisham & Southwark	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Southwark	
Contact person: Ms Jacky Bourke-White	Position: Director of Operations
Website: http://www.ageuk.org.uk/lewishamandsouthwark	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 296862
When was your organisation established? 06/12/1987	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Older Londoners
Which of the programme outcome(s) does your application aim to achieve? Older Londoners having increased awareness of benefits, finance, housing and other rights
Please describe the purpose of your funding request in one sentence. To ensure vulnerable older Londoners have access to entitlements and services to live a dignified life through the provision of a sustainable I&A service.
When will the funding be required? 01/01/2015
How much funding are you requesting? Year 1: £45,090 Year 2: £45,991 Year 3: £46,910 Total: £137,991

Aims of your organisation:

At AUKLS our ethos is to empower older people to make choices and take control of their lives and support, with our overall aim being to improving life for older people, especially those who are vulnerable.

Through service delivery, our specific aims are to:

1. Improve older people's health and emotional wellbeing
2. Enable older people to make a positive contribution
3. Reduce isolation
4. Ensure older people can exercise choice and control
5. Ensure freedom from discrimination or harassment
6. Maximise economic wellbeing
7. Ensure personal dignity and respect
8. Make best use of resources available and achieve best value

Main activities of your organisation:

We are passionate about delivering services that match our ethos and currently provide a wide variety of services ranging from complex care services to smaller projects, to enhance independence and wellbeing:

1. Day Care, for mentally and physically vulnerable older people
2. Healthy Living Initiatives, providing open access activities and social opportunities to re-able and empower
3. Independent Living Services including Help at Home, Happy Feet, Handy Persons and Safe and Independent Living, to enable older people to remain safe and independent within their home.
4. Information and Advice, maximising incomes and providing advise on housing, debt, continuity of care and consumer issues.
5. Outreach, to regain confidence, rebuild social networks and reintegrate into the community.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
22	46	8	150

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?
Rented	0

Summary of grant request

AUKLS deals with 9,500 information and advice (I&A) enquiries every year. The need for the service outstrips our capacity to deliver, with a five week waiting list for home visits and 1,040 older people turned away from our drop-in annually. The need for I&A is acute amongst older people, reflecting the levels of poverty, social isolation, and ill health in our boroughs.

Our delivery has evolved from conversations with older people struggling to use generic services, and tailored to meet their needs. We want to create a sustainable service that delivers advice to the most vulnerable, whatever the economic climate and plan to increase our use of volunteers to accomplish this. We will achieve this through the continued employment of our I&A manager who is experienced in advice delivery and training and supporting advice volunteers.

This enables us to increase capacity if funding is maintained or, in the expected scenario of funding reducing, maintain our ability to provide targeted advice to the most vulnerable, ensuring that older people aged over 75 years receive accurate and accessible I&A on benefit entitlements, housing, social care and services necessary for a dignified life. The delivery of the service from our trained volunteers, by telephone and face-to-face, will ensure older people have the knowledge and awareness of their rights, reducing the numbers of older people experiencing poverty and improving their mental and physical wellbeing.

Through the provision of our I&A service and our knowledge of local services older Londoners will be able to find out information on, and access with our support, through referrals and signposting, a wide range of services that holistically meet their needs. This will result in an improved wellbeing and healthier lifestyles.

We will provide information sessions and support for community organisations that work with older people to increase the number of older Londoners aware of services and entitlements available to them.

Advice volunteers are trained and skilled by the I&A Manager in community care, housing options, consumer issues, debt issues, benefits, including form filling and interviewing/communicating with older people. Regular supervision and involvement in team meetings are also provided. All volunteers are provided with a comprehensive induction and volunteer handbook, and volunteer days are held in recognition of their hard work and awards are given. We have a good track record of skilling volunteers for work.

We understand the need for personal contact, involvement and utilisation of a range of channels in providing good I&A to older people. AUKLS is governed by a board of trustees, 90% of which are older people. We will run an older persons steering group alongside the project and recruit older volunteers so that our service continues to reflect older people's needs. We are a trusted local organisation, with over 30 years experience, and the first point of call for older people seeking advice in the boroughs, with the majority being aged over 75 years.

AUKLS are quality marked through Age UK and ASA accredited. Over the years, we have built strong links and relationships within the voluntary and community sector and work in partnership with organisations in both boroughs and are members of three consortiums. We are part of a well-established referral network of agencies. Our advice service exceeds its contracted specification targets.

Lewisham and Southwark have a greater proportion of older residents from ethnic minorities than England as a whole. AUKLS work with people of all backgrounds. This is reflected by the diversity of our staff and volunteers, as well as our BAME projects.

AUKLS is currently reviewing its environmental policy, but our recent Age UK Quality Mark accreditation included environmental standards.

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? **Yes**

What Quality Marks does your organisation currently hold?

ASA accreditation and Age UK Organisational Quality Standards

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.

Through volunteer input to provide face-to-face advice and information through home visits, appointments and drop-ins on topics of need dealing with 5000 face-to-face enquiries in year 1 and increasing to 8000 in year 3.

Through volunteer input to provide telephone advice and information on social care, housing, benefits, and access to local services via our direct advice and information line, dealing with 4000 telephone enquiries in year 1 and increasing to 5000 in years 2 and 3.

Through volunteer input to support older people with benefit check, form filling and representation at benefit tribunals where required, bringing in £750,000 per year in benefits for local older people.

To recruit and train 5 volunteers in information and advice every year, increasing to 15 volunteers by year three.

To provide a total of 14 local organisations, who support older people, in each borough with workshops/information sessions and training on benefits.

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.

Older people will live a dignified life through receiving information and advice they need.

Older people aged over 75 years will have an increased knowledge and awareness of their rights

An increased number of older people aged over will receive their full benefit and other entitlements in the borough and will have additional income.

An economically sustainable information and advice service will be created based on the increased use and coordination of volunteers.

Increased skills and knowledge for volunteers increasing their job prospects.

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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?

AUKLS will be seeking to continue our I&A service through regular review of our yearly income generation plan. This plan allows us to have a broad funding base, including earned income, Trusts and grants, donations and statutory income. We will continue to prioritise maintaining this service through redesign, fundraising and income generation.

Who will benefit?

About your beneficiaries

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

1,000

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

Lewisham (50%)

Southwark (50%)

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?

81-90%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Advice Managers Salary	30,000	30,600	31,212	91,812
National Insurance Contributions at 10%	3,000	3,060	3,121	9,181
Pension at 5%	1,500	1,530	1,561	4,591
Project costs inc Volunteer expenses	3,450	3,519	3,589	10,558
Management and Overheads	4,140	4,222	4,306	12,668
Contribution to premises and rent	3,000	3,060	3,121	9,181
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	45,090	45,991	46,910	137,991
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
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	0	0	0	0
	0	0	0	0

TOTAL:	45,090	45,991	46,910	137,991
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Finance details

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

Financial year ended:	Month: March	Year: 2014
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Income received from:	£
Voluntary income	216,908
Activities for generating funds	262,161
Investment income	1,164
Income from charitable activities	1,297,667
Other sources	43,018
Total Income:	1,820,918

Expenditure:	£
Charitable activities	1,724,407
Governance costs	30,048
Cost of generating funds	92,038
Other	
Total Expenditure:	1,846,493
Net (deficit)/surplus:	(25,575)
Other Recognised Gains/(Losses):	
Net Movement in Funds:	25,575

Asset position at year end	£
Fixed assets	75,509
Investments	
Net current assets	349,915
Long-term liabilities	
*Total Assets (A):	425,424

Reserves at year end	£
Endowment funds	
Restricted funds	16,695
Unrestricted funds	408,729
*Total Reserves (B):	425,424

* 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?

63%

Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

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	808,357	193,477	698,464
London Councils	6,170	0	0
Health Authorities	110,000	110,000	110,000
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 £
Big Lottery Fund	492,667	119,195	110,608
Henry Smith Foundation	0	0	38,700
Terra Firma	20,000	0	0
Esmee Fairbairn	0	0	17,545
Clothworker foundation	0	0	20,000

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: **Jacky Bourke-White**

Role within **Chief Executive Officer**
Organisation: