

ASSESSMENT CATEGORY - Older Londoners**Age UK Richmond Upon Thames****Adv: Sandra Davidson****Amount requested: £112,238****Base: Richmond****Benefit: Richmond****Amount recommended: £102,000****The Charity**

Age UK Richmond upon Thames (AUKRuT) is a well-established voluntary sector organisation supporting the interest of older people through a range of information and support services. It provides a free helpline, giving advice on money and benefits; it runs three social centres, allowing older people to take part in a range of social activities and exercise classes; and a handy person service, offering assistance with practical jobs around the home and garden. It supported over 9,800 older people during 2015-16 on a one-to-one basis, an increase of 28% on the previous year.

The Application

AUKRuT is requesting three-year funding to continue and develop its Community Services activities for people 75 years and above. The project will provide a suite of opportunities in a variety of locations across the borough for people 75+ with a strong focus on those who are in times of transition e.g. have suffered bereavement, retirement, divorcees, or have poor health.

The Recommendation

AUKRuT is the largest independent provider of specialised services for older people in the London Borough of Richmond upon Thames and has an excellent track record of delivering quality services. Your funding, if awarded, will allow AUKRuT to build on the success of the Community Services Team, meeting the needs of an ageing population. The amount recommended is less than the amount requested as the activity costs appear to be on the high side. The intended outcomes remain the same. A grant is recommended:

£102,000 over three years (£33,000; £34,000; £35,000) towards the salary of a part-time Community Services Co-ordinator (1dpw) and related activity and support costs for a project working with isolated older people aged 75 plus.

Funding History

Meeting Date	Decision
30/06/2011	£106,000 over three years (£35,000; £35,000; and £36,000) towards the salary, activity and support costs of an Outreach Coordinator (2.5 days per week) and a Volunteer Coordinator (1 day per week).

Background and detail of proposal

Richmond upon Thames is a mixed borough, principally urban, with a mix of population centres, some with in areas of significant poverty and deprivation and other areas being populated by a high proportion of single older people (often asset

rich, cash poor). The borough's Public Health department recently estimated by 2020, the number of people living alone will increase by 23% for older people, of which 18% will be over 75 years. AUKRuT has shown there is a clear need for services for those over 75+ for whom loneliness and isolation is one of the biggest cause of poor health and depression. Building on the success of an outreach service called "The Wellderly Project" (previously funded by the Trust) the charity has developed its programme of activities to engage and identify older people 75+. Activities include 'Man with a Pan' cookery classes, golf, health walks, nutrition workshops, and social activities. With 1.8FTE staff and 30 volunteers on this project, the charity plans to reach over 500 older people 75 plus annually.

Financial Information

Forecast income for 2016/17 is £1,263,758 of which £1,001,800 (79%) was confirmed as at 16 August 2016. The cost of generating funds relates to the trading subsidiaries' expenditure and does not include any costs incurred directly by the charity. The charity have identified that they are incurring costs of generating funds in the charity itself of approximately £12,000 per annum and will adapt their future financial statements accordingly. Trading costs are likely to vary year on year depending on the need for the assistance offered through Handyperson services (including Help at Home).

The charity's Business Plan proposes a target of holding free unrestricted reserves equivalent to 6 months' worth of operating expenditure.

Year-end at 31 March 2015	2014/15 Audited	2015/16 Draft Accounts	2016/17 Current Year Forecast
	£	£	£
Income and Expenditure			
Income	1,279,005	1,352,412	1,263,758
Expenditure	1,279,156	1,300,911	1,284,700
Unrestricted Funds Surplus / (Deficit)	(151)	51,501	(20,942)
Restricted Funds Surplus / (Deficit)	0	0	0
Total Surplus / (Deficit)	(151)	51,501	(20,942)
Surplus / (Deficit) as a % of turnover	(0%)	3.8%	(1.7%)
Cost of Generating funds (% of income)	131,211 (10.2%)	199,677 (14.8%)	137,665 (10.9%)
Free unrestricted reserves			
Unrestricted free reserves held at Year End	354,897	406,398	385,456
~ how many months' worth of expenditure	3.33	3.75	3.6
Reserves Policy target	639,578	650,455	642,350
~ how many months' worth of expenditure	6	6	6
Free reserves over target / (under target)	(284,681)	(244,057)	(256,894)