

**AGE CONCERN WOKING – APPLICATION FOR FINANCIAL ASSISTANCE**

<b>Executive Summary</b>	
<p>Age Concern Woking is a local independent charity whose aim is to give support to older people in the Borough. The Charity provides free support in the form of friendship, 'home from hospital' support, emergency help and home fire safety checks.</p> <p>Age Concern Woking has this year applied for a grant of £20,000 to enable it to widen its services by increasing the number of paid hours worked by the employees. The Applicant has indicated that the staff members provide a number of hours each week on a voluntary basis. By increasing the hours, the Group aims to increase the number of older people supported throughout the Borough by approximately 50 individuals. The Group would also seek to increase the number of volunteers, improve awareness of the services available and encourage people living in sheltered accommodation to socialise more with each other.</p> <p>It is not felt that the application has provided sufficient evidence to justify a grant of £20,000 to increase staff hours and to pay for hours that are currently provided on a voluntary basis. The Council must also take into account that it is likely that ongoing funding would be required in future years for the proposals. In view of this, and the pressures on the Council's Community Grants Scheme, it is not proposed that the Council provides funding for the extension of the service. Accordingly it is recommended that the application is not supported.</p>	

<b>Recommendations</b>	
Reasons for Decision	The application has not demonstrated sufficient justification for the Council to enter into a funding arrangement for the extension of existing services.
The Executive is requested to:	<b>RESOLVE That</b> no grant be awarded.

**The Executive has authority to determine the above recommendation.**

**Background Papers:**

2018/19 Application Form.

**Reporting Person:**

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## **Age Concern Woking – Application For Financial Assistance**

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### **Date Published:**

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<b>1.0 Summary of Application</b>	
1.1 Status and Aims	<p>Age Concern Woking formed in 2003 and became operational in 2005. The aim of the Group is to promote the wellbeing of older people in the Woking Borough and to make later life as pleasant and worry free as possible. The Group's main activities are a 'friendship' service and an information and support line. Age Concern Woking also offers emergency help for those who have no one else to turn to.</p> <p>The Group is based at offices in the Moorcroft Centre.</p>
1.2 Employees	5 consisting of the Manager (20 hours per week), the Client Liaison Officer (15 hours per week) and three Support Officers (18, 15 and 5 hours per week).
1.3 Volunteers	87. Volunteers visit lonely older people in their own homes for at least an hour every week. They offer friendship and support and report back any concerns. Some volunteers will also assist in emergency situations.
1.4 Clients/Users	<p>123. The 'users' are clients visited on a regular basis. In addition, the Group supports 80 callers a month accessing the information and support service.</p> <p>Aged over 90 - 44%</p> <p>Aged 85-89 - 31%</p> <p>Aged 80-84 - 15%</p> <p>Under 80 - 10%</p> <p>Live alone 40%, 29%, 17%, 14% respectively.</p>
1.5 Members	No.
1.6 Sum Requested	£20,000 (Revenue)
1.7 Project	<p>The funding requested is intended primarily to expand the friendship services into Sheltered Housing where there is a recognised issue of loneliness. Working in close coordination with existing Council services, Age Concern Woking would substantially increase the number of clients visited on a regular basis and incorporate new social opportunities and events targeted at this group. The applicant has indicated that this can be achieved by expanding the amount of paid staff hours together with a comparable increase in volunteers.</p> <p>To help achieve this, Age Concern Woking plans to expand awareness of its services and volunteering opportunities by advertising more widely, putting articles in more publications, giving talks to more groups, visiting sheltered housing and day centres on a regular basis and spending days at various local supermarkets giving out leaflets and generating awareness. The extra staff hours will help ensure that staff/volunteers are available to cover emergency situations at all times, currently undertaken by paid staff acting in a volunteer capacity. These are normally situations that are too minor to involve the emergency services but too major for the client to cope</p>

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	<p>with alone.</p> <p>The Applicant has advised that the Group anticipates working closely with existing Woking Borough Council centres, such as Moorcroft, to develop special events for older persons who may not be as active as their current clientele.</p>
<p>1.8 Cost breakdown:</p>	<p>The application is based on the following assumptions:</p> <ul style="list-style-type: none"> <li>○ £10,000 – Increasing staff hours by 15 hours per week including NIC and pension costs.</li> <li>○ £5,000 – Share general administration costs including office rent etc.</li> <li>○ £2,000 – Advertising material</li> <li>○ £1,000 – Staff travel and training</li> <li>○ £2,000 – Support event costs including client refreshments and activities.</li> </ul> <p>Previous funding has been a combination of a grant from WBC (withdrawn this year), rental income from a small property donated by a satisfied client (sold last year, and recently been replaced by a more economically to maintain property), sponsorship by local businesses, local churches, legacies and donations.</p>
<p>1.9 Community Benefit</p>	<p>The applicant has advised that the issues of loneliness, especially in older men, is well documented as are the positive effects achieved even by simple processes such as regular visiting (befriending). The Group receives, on average, two referrals a week for the friendship service, often directly from the clients themselves, or from relatives or local social and health workers and other local charities. The Service receives on average of 80 calls per month requesting information or support. Many calls are from people who do not have access to internet based helplines.</p> <p>Older people who have hitherto been self-supporting and have never had the need to ask for help suddenly find that, due to increasing age or infirmity, they now need support. The Group advises that the phone calls received demonstrate the need for the services. The Group works with Moorcroft and local agencies including Careline, CAB, Homelink, Home Support, Community Meals and GPs.</p> <p>Through the application, Age Concern Woking is seeking to extend its friendship services to another 50 people (making a total of c150) and double the bank of active volunteers to give friendship and support to these extra clients. In excess of 750 older people would benefit from the information and support service.</p>

<p><b>2.0 Financial Background</b></p>	
<p>2.1 Budget</p>	<p>At the time of the application, the Group held £38,000 in the bank.</p> <p>The Group has submitted a budget for 2017/18 (rather than 2018/19) which shows an anticipated income of £34,000 against an anticipated expenditure of £49,820, resulting in an anticipated deficit of £15,820.</p> <p>Anticipated income includes fundraising (£30,000) and rent (£400).</p>

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	Items of expenditure include salaries (£37,000), national insurance (£4,000), staff travel (£1,200) and services (£2,000).
2.2 Accounts	<p>The Group has submitted accounts for 2016/17 which show an income of £9,278 (£112,750 in 2015/16) against expenditure of £48,349 (£37,402 in 2015/16), resulting in a deficit of £39,070 (a surplus of £75,348 in 2015/16).</p> <p>The sum of £236,957 was carried forward at the end of the 2016/17 year, an element of which has now been used to purchase a property to generate an annual income in the region of £8,000.</p> <p>The sale of the charity's primary endowment in 2015 created a surplus of £76,280 held in General Funds. Following Charity Commission advice, the Trustees restricted fund raising efforts in 2016/17 to bring reserves down to acceptable levels. The applicant has advised that the current reserves are now below projected annual expenditure and the Trustees have reinstated fund raising activities.</p>
2.3 Support over the past five years	<p>2016/17 – Grant Application for £5,000 not supported by the Executive. A number of concerns over the application and the services of the Group had been raised by the Council's Strategic Director, including the provision of factually incorrect and outdated information about service offers. In view of the feedback received and the financial position of the Group, it was resolved that the application should not be supported.</p> <p>2015/16 – £5,000</p> <p>2014/15 – £5,000</p> <p>2013/14 – £5,000</p> <p>2012/13 – £5,000</p>

<b>3.0 Assessment of Application</b>		
3.1 Key Information	<ul style="list-style-type: none"> <li>○ Constitution</li> <li>○ Registered Charity</li> <li>○ VAT Registered</li> <li>○ Equal Opportunities Policy</li> <li>○ Safeguarding Policy</li> <li>○ Reserves Policy</li> <li>○ Quality Mark</li> <li>○ Other funding sources pursued</li> <li>○ Other support by the Council</li> <li>○ Fundraising</li> <li>○ Two quotes</li> <li>○ Regular monitoring provided previously</li> </ul> <p>*Mandatory and Discretionary rate relief</p>	<ul style="list-style-type: none"> <li>Yes</li> <li>Yes</li> <li>No</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>No</li> <li>No</li> <li>Yes*</li> <li>No</li> <li>N/A</li> <li>N/A</li> </ul>

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<p>3.2 Consultee Comments</p>	<p><u>Officer Comment</u></p> <p>There is no doubt that the work of Age Concern Woking is well received by those who use the service. Isolation and loneliness at any age is a significant wellbeing issue for those who experience such and has been identified as a key area of concern in Woking's Health and Wellbeing Plan. Work is therefore being undertaken with a variety of local partners across the local Woking health and wellbeing network to identify and support individuals to access local opportunities.</p> <p>I am pleased to note that Age Concern Woking have taken on board comments made on previous grant applications about engaging more proactively with the wider network, and up-skilling their knowledge of what's available locally in terms of services and information and advice and would encourage them to continue to do so.</p> <p>In light of such, I wouldn't be opposed to making a small contribution to their running costs based on similar levels as previous grants (£5,000), although I would not be supportive of this request at £20,000 as I do not consider that they have sufficiently substantiated the case for such or how the post would be sustainable going forward without the council's continued support.</p>
<p>3.3 Assessment</p>	<p>Age Concern Woking has this year applied for a grant of £20,000 to enable it to increase its services by increasing the number of paid hours worked by the employees. The Applicant has indicated that at present the staff members provide a number of hours each week on a voluntary basis. By increasing the hours, the Group aims to increase the number of older people supported throughout the Borough by approximately 50 individuals. The Group would also seek to increase the number of volunteers, improve awareness of the services available and encourage people living in sheltered accommodation to socialise more with each other.</p> <p>Between 2008 and 2017, the Council had supported Age Concern Woking with an annual payment of £5,000 towards general running costs. In December 2016 the Executive took the decision not to provide any funding support in 2017/18. The decision followed concern by the Council's Strategic Director over the Group's lack of joint working across the wellbeing network in Woking despite having been a condition of the grant. In addition, it was reported that engagement with Age Concern Woking had highlighted that the information and advice given out about service offers and support within Woking was factually incorrect and outdated.</p> <p>It is not felt that the application has provided sufficient evidence to justify a grant of £20,000 to increase staff hours and to pay for hours that are currently provided on a voluntary basis. The Council must also take into account that it is likely that ongoing funding would be required in future years for the proposals.</p> <p>In view of this, and the pressures on the Council's Community Grants Scheme, it is not proposed that the Council provides funding for the extension of the service. Accordingly it is recommended that the application is not supported.</p>

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