

**THE BRIGITTE TRUST – APPLICATION FOR FINANCIAL ASSISTANCE**

**Executive Summary**

The Brigitte Trust is an independent registered charity offering free emotional support and practical help at home to people and their families facing cancer, Motor Neurone Disease, MS, heart and lung failure and other life-threatening illness. The service, established over thirty years ago, is based in Dorking and provides its services across Surrey free of charge.

The Trust has approached Woking Borough Council to continue its funding for 2020/21 by way of a reduced grant of £2,500 to enable the Charity to continue its training programme for volunteers in the Borough. Last year the Group applied for and was awarded the sum of £3,000. Through the training, the Trust will be able to support more individuals, their carers and their families across Woking, working with organisations such as the Woking and Sam Beare Hospice.

It is considered that the Trust provides an invaluable service, providing emotional support and practical help to individuals with a life threatening illness. The Trust works closely with organisations such as Woking and Sam Beare Hospice. Across the County, over the past 12 months a total of 39 referrals have been received for the Trust’s Home Visiting service from the Hospice.

Between April and September 2019 support has been provided to 12 people in Woking, with 42 visits and 85 hours of practical and emotional support provided. By April 2021, the Trust aims to have supported 40 people from Woking and provided training to 10 new volunteers. Two training courses for volunteers were undertaken in April and September, with 17 new volunteers dedicated to Woking receiving training.

In view of the benefits the Charity would bring through the grant funding, it is proposed that the application should be supported, enabling it to further increase the number volunteers in the Borough. In accordance with the Council’s approach to funding community organisations, monitoring information on the work of the Trust will required throughout the year, following the progress of the training programme, particularly in the Borough of Woking. It is recommended that funding of £2,500 is awarded for 2020/21.

**Recommendations**

The Executive is requested to:	<b>RESOLVE That</b> a grant of £2,500 be awarded to cover the costs of a volunteer training programme in Woking.
Reason for Decision	To enable the Trust to offer its services to more residents of the Borough through the recruitment of additional volunteers.
Legal Authority	S137 Local Government Act 1972
Conditions	<b>Accounts.</b> The Organisation must submit audited accounts for the year in which the grant is awarded, including an income and expenditure account and balance sheet. Please note that accounts for other years may also be required. <b>Monitoring Information.</b> The Organisation must submit quarterly

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	<p>monitoring information as a measure of its achievements. Failure to provide details will jeopardise the award. E-mail requests will be sent to the applicant on a quarterly basis.</p> <p><b>Publicity.</b> Where possible, the Organisation is required to publicise the support received from Woking Borough Council, including on all literature and leaflets produced.</p> <p><b>Payments.</b> Unless exceptional circumstances exist all invoices must be received quarterly with details of the costs incurred and monitoring information for the previous quarter.</p> <p><b>Payment Period.</b> Final quarter claims must be made by the second week in March. Unclaimed awards will not be available at a later date unless exceptional circumstances can be demonstrated to the Council before the end of the award year.</p> <p><b>Joint Working.</b> WBC expects the Organisation to engage positively on health and wellbeing multi-agency joint work affecting Woking. Groups which refuse may place their Council support at risk, e.g. grant, concessionary rent and other assistance.</p> <p><b>Homelessness Reduction Act 2017.</b> With the introduction of new legislation from April 2018, the Council will expect the support of partner agencies in identifying people at risk of homelessness as early as possible to maximise the opportunities to prevent such. Partner agencies / organisations will be expected to be engaged in joint working arrangements to assist in finding suitable housing and support solutions, and where appropriate to undertake and respond to the new 'duty to refer'. Groups which do not support this new legislation and way of working positively, may put their Council support at risk.</p>
Performance Indicators	<p><b>Users.</b> The Organisation to provide a breakdown of the users in the past quarter.</p> <p><b>Activities.</b> The Organisation to provide details of activities and events held during the last quarter.</p> <p><b>Training.</b> The Organisation to provide a quarterly update on its training programme, including the number of Woking residents trained as volunteers.</p> <p><b>Publicity.</b> The Organisation to advise how the Council's support has been publicised over the last quarter.</p> <p><b>Statement of Use.</b> The Organisation to provide a statement stating the use to which the grant money has been put.</p>
Future Support	<p>The financial pressure on the Council's budgets is expected to continue in the coming years and accordingly the overall level of support available in future years may be reduced. The applicant is therefore to be advised that the award of funding for 2020/21 does not imply that a similar application in 2021/22 would be supported. In particular, it is emphasised that the Council is unlikely to be in a position to award any sums above the 2020/21 levels.</p> <p>In view of this, the applicant is to be advised to ensure that contingency plans for the Group's operations for 2021/22 have been drawn up in the event that the Council is unable to continue its support beyond April 2021. All applicants are strongly recommended to</p>

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pursue alternative sources of funding and are encouraged to approach Woking Borough Council's Community Support Team for advice and support.

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

### **Background Papers:**

2020/21 Application Form.

### **Reporting Person:**

Ray Morgan, Chief Executive  
Extn: 3333, Email: ray.morgan@woking.gov.uk

### **Contact Person:**

Frank Jeffrey, Democratic Services Manager  
Extn: 3012, Email: frank.jeffrey@woking.gov.uk

Doug Davern, Democratic Services Officer  
Extn: 3018, Email: doug.davern@woking.gov.uk

### **Portfolio Holder:**

Cllr Ayesha Azad  
Email: Cllrayesha.azad@woking.gov.uk

### **Shadow Portfolio Holder:**

Cllr Will Forster  
Email: cllrwill.forster@woking.gov.uk

### **Date Published:**

18 February 2020

# **The Brigitte Trust – Application For Financial Assistance**

## The Brigitte Trust – Application For Financial Assistance

<b>1.0 Summary of Application</b>	
1.1 Status and Aims	<p>The Brigitte Trust is a Queens Award winning charity which has provided free emotional support and practical help across Surrey to those with life threatening conditions, their carers and family members since 1984. The free service, normally three hours per week, is flexible according to the needs of the client and may be provided in the home, supporting the client (and carer) to access matters of interest to them, for as long as they are able.</p> <p>Emotional support, by providing a confidential listening ear and respecting individual and cultural needs is the cornerstone of the service, supporting the client, carer and family members through difficult times. Practical support may include transport to medical appointments, food shopping, home tasks or social visits.</p> <p>At referral, the service co-ordinators will match a volunteer with the family, ensuring the volunteer will provide continuity of support. The service co-ordinator remains the liaison point with the client family, the volunteer, health professionals and hospitals for the period of support. Bereavement support for up to three months is also available to the family.</p>
1.2 Employees	<p>Five comprising Charity Manager (21 hours per week), Promotions manager (16 hours per week), Administrator (21 hours per week), Services co-ordinator (30 hours per week), and Training and support officer (24 hours per week).</p>
1.3 Volunteers	<p>106.</p> <p>Volunteers provide a range of support at the request of the client with a life threatening diagnosis. A volunteer will sit with the client, provide respite for the carer and assist with activities such as hospital appointments and shopping. Volunteers also provide bereavement support to the family after someone has died, providing emotional support.</p> <p>Volunteers undergo a rigorous initial training programme comprising nine consecutive week days, a weekend and on-going training and development each year.</p>
1.4 Clients/Users	<p>204, comprising:</p> <ul style="list-style-type: none"> <li>87 male</li> <li>117 female</li> <li>25 ethnic minority</li> <li>18 resident in Woking</li> <li>40 aged 19-65</li> <li>164 aged 65+</li> </ul> <ul style="list-style-type: none"> <li>○ Over 80% have cancer.</li> <li>○ 5% have had a Stroke or neurological problem.</li> <li>○ 57% live alone and who in addition to their poor health condition</li> </ul>

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	<p>often suffer isolation.</p> <p>The services are provided free of charge.</p>
1.5 Members	<p>120, comprising:</p> <p>20 male</p> <p>100 female</p> <p>5 disabled</p> <p>12 ethnic minority</p> <p>12 resident in Woking</p> <p>45 aged 19-65</p> <p>75 aged 65+</p> <p>An annual charge of £15 is made.</p>
1.6 Sum Requested	£2,500 (Revenue)
1.7 Project	<p>The grant awarded in 2019/20 has enabled the Trust to slowly increase the number of Woking residents it supports, through the expansion of its training programme to volunteers from the Borough.</p> <p>During the past 12 months, a total of 18 people with a life-threatening diagnosis in Woking have been supported, with increasing demand not enough volunteers in place to fulfil these referrals.</p> <p>The Trust has applied for funding towards the further expansion of volunteer recruitment in the Borough to help ensure that the resources are in place to help those facing a life-threatening diagnosis, who would strongly benefit from the listening ear of a non-judgmental person at a time of uncertainty and change.</p>
1.8 Cost breakdown:	<p><u>Costs of Volunteer Training Programme</u></p> <p>Advertising for volunteers - £500</p> <p>Taster course - £120</p> <p>Training sessions – comprising of nine intensive sessions - £540</p> <p>Weekend sessions - £240</p> <p>Room hire £50 per session x 9 - £480</p> <p>Room hire weekend - £150</p> <p>Contribution towards the administration and management - £470</p> <p>Total for one course - £2,500</p>
1.9 Community Benefit	<p>During the past 12 months the Group has provided specialist support and practical help to 18 individuals and their families facing a life threatening diagnosis within Woking. Direct training has also been undertaken by nine volunteers in Woking, providing them with important life skills they can use within their own professional and personal lives.</p>

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<b>2.0 Financial Background</b>	
2.1 Budget	<p>At the time of the application, the Group held £128,883 in the bank. The Trust is 8 months into a five year lease so have an obligation of nearly £50,000 over the next 4.25 years. The Reserves Policy of the Group states that a minimum of six months' running costs should be held.</p> <p>The Group has submitted a budget for 2020/21 which shows an anticipated income of £203,485 against an anticipated expenditure of £174,196, resulting in an anticipated surplus of £29,289.</p> <p>Anticipated income includes Surrey Downs CCG (£51,804), charitable trust income (£67,500), general grants (£10,000), fundraising (£37,800), legacies (£3,000), and donations (£17,760). Items of expenditure include charity manager (£23,808), operational costs (£67,558), promotions and fundraising costs (£34,428), premises cost (£12,780) and administration (£35,322).</p>
2.2 Accounts	<p>The Group has submitted accounts for 2018/19 which show an income of £158,455 (£154,207 in 2017/18) against expenditure of £175,914 (£204,043 in 2017/18), resulting in a deficit of £17,459 (a deficit of £49,836 in 2017/18). The sum of £123,884 was carried forward at the end of the 2018/19 year.</p>
2.3 Support over the past five years	2019/20 – £3,000

<b>3.0 Assessment of Application</b>																																					
3.1 Key Information	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;"><input type="radio"/></td> <td style="width: 70%;">Constitution</td> <td style="width: 25%;">Yes</td> </tr> <tr> <td><input type="radio"/></td> <td>Registered Charity</td> <td>Yes</td> </tr> <tr> <td><input type="radio"/></td> <td>VAT Registered</td> <td>No</td> </tr> <tr> <td><input type="radio"/></td> <td>Equal Opportunities Policy</td> <td>Yes</td> </tr> <tr> <td><input type="radio"/></td> <td>Safeguarding Policy</td> <td>Yes</td> </tr> <tr> <td><input type="radio"/></td> <td>Reserves Policy</td> <td>Yes</td> </tr> <tr> <td><input type="radio"/></td> <td>Quality Mark</td> <td>No</td> </tr> <tr> <td><input type="radio"/></td> <td>Other funding sources pursued</td> <td>Yes</td> </tr> <tr> <td><input type="radio"/></td> <td>Other support by the Council</td> <td>No</td> </tr> <tr> <td><input type="radio"/></td> <td>Fundraising</td> <td>Yes</td> </tr> <tr> <td><input type="radio"/></td> <td>Two quotes</td> <td>N/A</td> </tr> <tr> <td><input type="radio"/></td> <td>Regular monitoring provided previously</td> <td>Yes</td> </tr> </table>	<input type="radio"/>	Constitution	Yes	<input type="radio"/>	Registered Charity	Yes	<input type="radio"/>	VAT Registered	No	<input type="radio"/>	Equal Opportunities Policy	Yes	<input type="radio"/>	Safeguarding Policy	Yes	<input type="radio"/>	Reserves Policy	Yes	<input type="radio"/>	Quality Mark	No	<input type="radio"/>	Other funding sources pursued	Yes	<input type="radio"/>	Other support by the Council	No	<input type="radio"/>	Fundraising	Yes	<input type="radio"/>	Two quotes	N/A	<input type="radio"/>	Regular monitoring provided previously	Yes
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3.2 Consultee Comments	<p><u>Jade Buckingham, Health and Wellbeing Manager</u></p> <p>As part of our ongoing Health and Wellbeing commitment and aims to support carers across the borough, I support this application and would recommend the full grant amount of £2,500.</p>																																				

## The Brigitte Trust – Application For Financial Assistance

### 3.3 Assessment

The Brigitte Trust is an independent registered charity offering free emotional support and practical help at home to people and their families facing cancer, Motor Neurone Disease, MS, heart and lung failure and other life-threatening illness. The service, established over thirty years ago, is based in Dorking and provides its services across Surrey free of charge.

The Brigitte Trust was set up by Dorking resident Brigitte Watkin to support people at the end of life in their own homes, offering support and respite to their carers and emotional support to the wider family together with bereavement support. In 2015 the Trust received the Queen's Award for Voluntary Service, the highest award given to local volunteer groups across the UK to recognise outstanding work done in their own communities.

The service relies on volunteers and the purpose of the application before the Executive is to seek funding to continue its volunteer training programme for Woking, with a view to expanding the service in the Borough.

The volunteers normally provide the service for three hours per week, though this is flexible according to the needs of the client. In providing emotional support, volunteers are sensitive to the individual and cultural needs of each person supported, with confidentiality maintained and respected. All volunteers are required to attend an intensive initial training course as well as monthly supervision and ongoing training.

Over the past year the Trust has undertaken a number of fundraising events, including quizzes, marathons, bike rides, raffles, craft fairs, fetes and fayres. The Trust is part funded by Surrey Downs CCG plus local and national funders. During 2020/21, circa £52,000 will be received from the CCG, with funding applications made so far to the Pink Ribbon Foundation, the Henry Smith Charity, The Ranmore Trust and the Leathersellers' Company.

The Trust provides an invaluable service, working with organisations such as Woking and Sam Beare Hospice. Across the County, over the past 12 months a total of 39 referrals have been received for the Trust's Home Visiting service from the Hospice. During the first six months of the financial year the Trust has undertaken the following activities:

- Undertaken two training courses in April and September for volunteers, with 17 volunteers trained who are dedicated to Woking
- Held two taster sessions for volunteers in July and November
- Held two additional training sessions for existing volunteers on Advanced Care Planning and First Aid, with a further session planned on the effects of trauma
- Facilitated bi-monthly support groups for volunteers
- Networked with Woking and Sam Beare Hospice, Macmillan Cancer Care, North West Surrey Clinical Lead for Cancer and End of Life Care, Ashford and St. Peter's Hospital and GP practices to raise awareness of its work.

Between April and September 2019 support has been provided to 12 people in Woking, with 42 visits and 85 hours of practical and emotional support provided. By April 2021, the Trust aims to have

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supported 40 people from Woking and provided training to 10 new volunteers.

The request before the Executive is seeking a contribution of £2,500 to enable the Charity to continue its volunteer training programme in Woking, with a view to expanding the service in the Borough. Last year the Group applied for and was awarded the sum of £3,000.

It is considered that the work of this Charity, a holder of the Queen's Award for Voluntary Service, should be supported in the coming year, enabling it to increase the number volunteers in the Borough and thereby support more individuals and their families. In accordance with the Council's approach to funding community organisations, monitoring information on the work of the Trust will be required throughout the year, following the progress of the training programme, particularly in the Borough of Woking. It is recommended that funding of £2,500 is awarded for 2020/21.

REPORT ENDS