

AGE UK SURREY – APPLICATION FOR FINANCIAL ASSISTANCE

Executive Summary

Established over 50 years ago, the Charity now known as Age UK Surrey was created to provide support to older people aged 50+ across Surrey, helping them to maximise their wellbeing and independence during later life. It aims to create a person-centred seamless service and group activities which meet individual needs and help people maintain independence and improve their emotional and physical wellbeing and resilience, thereby reducing loneliness and isolation. The services of the Charity include Information and Advice; Befriending; Digital Support; Help at Home; and social activities.

Age UK Surrey is applying for a revenue grant of £10,000 towards its newly set up regular social contact telephone service called 'Check-in and Chat' and, once possible, a home visiting service to enable befriending to take place between the Group's volunteers and the service users, with a third being over the age of 85 years old and often with existing medical conditions. The service is currently assisting 50 isolated people in the Borough.

The telephone befriending service was introduced following a 300% uplift in calls from people who were anxious and worried due to shielding or staying at home during the pandemic, which has affected their confidence in undertaking activities such as going outside or to the local shops. Many older people have been virtually housebound for several months as they have remained at home to stay safe. Those that previously have been able to enjoy and benefit from social contact of groups' activities and visiting places such as shops have not felt able to do so. The users of the 'Check in and Chat' service are stated to be very appreciative of the regular contact. The Charity's other services have been continued through telephone support; for example, the Information and Advice service assists users with the completion of benefit entitlement forms.

The Group has suspended its monthly fee subscription for Help at Home clients for 3 months and did not furlough its staff as they were telephoning clients and liaising with the volunteers, many of whom were shielding. When restrictions eased many clients were still cautious about allowing someone into their home and so there was a substantial decline in the Group's income from its Help at Home service. Reserves are being used to support the Charity during this time, although it has been successful in applying for some Covid-19 emergency grants to support the purchase of equipment required for remote working.

For residents of Woking, 19.5% of households have only people aged over 65 years old. The Charity noted that the fastest growing cohort of people are the post war baby boomers who are now reaching their 70s. Around 37% of clients are over the age of 85.

Taking into account the consultee comments which note the benefit which would be received by vulnerable and isolated residents, it is recommended that a one-off contribution of £5,000 be made towards the total cost of the 'Check in and Chat' befriending telephone service, stated to be circa £28,600. The quarterly monitoring submitted by the organisation should set out the number of people living within the Borough in receipt of the befriending calls.

Recommendations

The Executive is requested to:

RESOLVE That, subject to the outcome of the Council's budgetary process, a one-off grant of £5,000 be awarded from the Community

Age UK Surrey – Application For Financial Assistance

	Fund towards the costs of the telephone befriending service.
Reason for Decision	To enable isolated and vulnerable residents of the Borough to be supported by the befriending calls during the pandemic.
Legal Authority	S142 Local Government Act 1972
Confirmation of funding	<p>This award is provisionally made on the expectation that the Council's budgets for revenue and capital projects remain at the same level allocated for the current financial year. The Council's overall budget, including the sums allocated for community grants, will be determined by Council at its meeting on 11 February 2021. In the event the grant budgets are set at the anticipated levels, confirmation of the Council's support will be sent to successful applicants. Groups should not plan for the 2021/22 funding until this confirmation has been received.</p> <p>Should the budgets be reduced as part of the Council's efforts to achieve savings to offset the impact of Covid on the Council's financial position, a special meeting of the Executive will be held to review the provisional awards and allocate the funds available on a priority basis</p>
Conditions	<p>Accounts. The Organisation must submit 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.</p> <p>Monitoring Information. The Organisation must submit quarterly 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>Publicity. Where possible, the Organisation is required to publicise the support received from Woking Borough Council, including on websites and literature / leaflets produced.</p> <p>Payments. Unless exceptional circumstances exist all invoices must be received quarterly with monitoring information for the previous quarter.</p> <p>Payment Period. Final quarter claims must be made by the second week in April. 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>Joint Working. 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>Homelessness Reduction Act 2017. Following the introduction of new legislation from April 2018, the Council expects 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 are 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>

Age UK Surrey – Application For Financial Assistance

Performance Indicators	<p>Users. The Organisation to provide a breakdown of the users.</p> <p>Activities. The Organisation to provide details of activities and events held.</p> <p>Publicity. The Organisation to advise how the Council's support has been publicised.</p> <p>Statement of Use. The Organisation to provide a statement stating the use to which the grant money has been put.</p>
Future Support	<p>Due to the impact of Covid-19, the financial pressure on the Council's budgets is higher than ever and is expected to continue in the coming years. 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 2021/22 does not imply that a similar application in 2022/23 would be supported. In particular, it is emphasised that the Council is extremely unlikely to be in a position to award any sums above the 2021/22 levels.</p> <p>In view of this, the applicant is to be advised to ensure that contingency plans for the Group's operations for 2022/23 have been drawn up in the event that the Council is unable to continue its support beyond April 2022. All applicants are strongly recommended to pursue alternative sources of funding and are encouraged to approach Woking Borough Council's Community Support Team for advice and support.</p>

The Executive has authority to determine the above recommendations.

Background Papers:

2021/22 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 Simon Ashall
Email: Cllrsimon.ashall@woking.gov.uk

Shadow Portfolio Holder:

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

Date Published:

2 December 2020

Age UK Surrey – Application For Financial Assistance

Age UK Surrey – Application For Financial Assistance

Age UK Surrey – Application For Financial Assistance

1.0 Summary of Application	
1.1 Status and Aims	<p>Originally set up over 50 years ago as the Old Peoples Welfare Association, the Charity has undergone a number of name changes. In 2010 Age Concern Surrey became a brand partner of the Age UK network, changing its name to Age UK Surrey. The organisation was created to provide support to older people aged 50+ across Surrey.</p> <p>Its vision is for people to improve their wellbeing and independence to get the most from later life. Its strategic aim is to provide services, support and activities across Surrey to enable people to be resilient throughout the changes and challenges of later life.</p> <p>The Service Objectives are:</p> <ul style="list-style-type: none"> • To develop a system where individual needs are assessed at a single point of contact, to create a person-centred seamless service. This will result in increased individual choice and control, and access to the services people need from Age UK Surrey and/ or other organisations where appropriate. • To provide 1:1 person-centred services and group activities that meet individual needs, that maintain independence and result in improvements to emotional and physical health, wellbeing, resilience and reduce loneliness and isolation. <p>Age UK Surrey's services include:</p> <ul style="list-style-type: none"> • Information and Advice – provided by expert Advisors on older people's issues (including Benefit Entitlement Checks). • Befriending – home visiting and telephone support through its new Check in and Chat service that evolved from the needs of older people during and since the Covid-19 crisis. • Digital support – now delivered over the telephone by volunteers. • Help at Home – domestic and gardening support delivered by self-employed Home Helps and Gardeners. • Social Activities – including Tea and Chat, Men in Sheds, Lunch Club, Falls Prevention Class - currently suspended due to Covid-19. • Virtual support – virtual 'chat' and information and advice sessions offered through the Surrey Virtual Wellbeing Hub.
1.2 Employees	<p>41 staff equating to 28.14 FTE. Reporting to the Chief Executive are five Managers: Help at Home Manager, Wellbeing Manager, Information and Advice Manager, Finance and Support Services Manager and Marketing, Fundraising and Business Development Manager.</p>
1.3 Volunteers	<p>404, whose activities include befriending work, administrative support, leading social activities (Café Culture, Digital Support, GO50 Walks), and supporting the Advice team regarding benefit entitlements and Attendance Allowance applications.</p>

Age UK Surrey – Application For Financial Assistance

1.4 Clients/Users	<p>7,750, comprising: 2,403 male 5,347 female 527 resident in Woking 2,583 aged 19-65 5,167 aged 65+</p> <p>The following services provided by the Group have a fee attached: Help at Home (£25 annual fee), Gardening (£50 annually) and Men in Sheds (carpentry and social session held in Ash - £5 a session).</p>
1.5 Members	N/A
1.6 Sum Requested	£10,000 (Revenue)
1.7 Project	<p>The funding would help provide a regular social contact 'telephone lifeline' and, once possible, a home visiting when both the client and volunteer can do so safely, if they choose to.</p> <p>A friendly volunteer will be matched by an experienced Co-ordinator to a client. The client will receive a regular call (arranged at a mutually convenient time) and, if required, signposted to highly experienced Age UK Surrey Advisors on a range of issues that may be causing concern (e.g. money / care).</p> <p>Clients that are referred to the Group will first be called by an experienced Wellbeing Co-ordinator to make an initial assessment to establish if they would benefit from the service / signpost them to other agencies if required, for example if they are experiencing mental health issues that the volunteers would not be trained to deal with.</p> <p>As lockdown eases, depending on the client's needs and government guidelines the Group would explore home visiting befriending.</p> <p>The staff member would explain the service and find out a bit of background about the person in order to be able to make the best match possible for the client and volunteer.</p> <p>The Co-ordinator would contact the volunteer and confirm back to the client with information about the volunteer who would then get in touch with the client. The client and volunteer arrange convenient call times and frequency.</p> <p>The Co-ordinator is on hand to provide advice and guidance to the volunteer and ensure that the service is running smoothly for both the client and the volunteer and request 'stories' to share as long as both parties consent.</p>
1.8 Cost breakdown:	<p>Contribution towards costs - £14,312 Salary of Co-ordinator (21 hours) - £12,655 Salary of Volunteer Lead - £1,657 Total Cost - £28,624</p>
1.9 Community Benefit	<p>With the funding, the Group would expect to be able to make a difference to approximately 50 isolated people's lives and also their supporting volunteers.</p> <p>People would benefit by feeling less lonely and isolated and more</p>

Age UK Surrey – Application For Financial Assistance

	<p>connected socially. It would help improve a person's health, wellbeing and resilience knowing that they are supported in a person centred way and result in them feeling that they:</p> <ul style="list-style-type: none"> • Are valued and listened to. • Have increased peace of mind to deal with daily life. • Have increased sense of purpose in life and feel it is worth getting up in the morning. • Are more happy and content with life. • Feel of value to people. • More able to share how they feel and express their needs. • Feel more able to deal with things when they go wrong. • Are more connected to others. • Have access to the support they want and need (practical, emotional or physical). • Have reduced stress and anxiety overall, improved mood or relating to a specific issue.
1.10 Covid-19 Impact	<p>The Charity states that it is receiving calls from older people who say that they are feeling more isolated than ever before and are experiencing anxiety, which has affected their confidence with going outside in the current environment.</p> <p>Many older people have been virtually housebound for many months as they have remained at home to stay safe. Those that previously have been able to enjoy and benefit from social contact of groups' activities and visiting places such as shops have not felt able to do so.</p>

<h3>2.0 Financial Background</h3>	
2.1 Budget	<p>At the time of the application, the Group held £473,000 in the bank. Reserves have been designated to invest in services and activities to generate income for the longer term sustainability of the Charity.</p> <p>The Group has submitted a budget for 2021/22 which shows an anticipated income of £828,000 against an anticipated expenditure of £1,000,000, resulting in an anticipated deficit of £172,000.</p> <p>Anticipated income includes services (£489,000), statutory (£182,000) and voluntary (£57,000). Items of expenditure include salaries (£725,000), operations (£218,000) and premises (£57,000).</p>
2.2 Accounts	<p>The Group has submitted accounts for 2019/20 which show an income of £1,357,797 (£1,063,098 in 2018/19) against expenditure of £1,210,731 (£1,285,305 in 2018/19), resulting in surplus of £147,066 (a deficit of £222,207 in 2018/19). The sum of £1,592,441 was carried forward at the end of the 2019/20 year.</p>
2.3 Support over the past five years	<p>New application.</p>

Age UK Surrey – Application For Financial Assistance

3.0 Assessment of Application		
3.1 Key Information	<ul style="list-style-type: none"> ○ Constitution ○ Registered Charity ○ VAT Registered ○ Equal Opportunities Policy ○ Safeguarding Policy ○ Reserves Policy ○ Quality Mark ○ Other funding sources pursued ○ Other support by the Council ○ Fundraising ○ Two quotes ○ Regular monitoring provided previously 	<ul style="list-style-type: none"> Yes Yes No Yes Yes Yes Yes No No Yes N/A N/A
3.2 Consultee Comments	<p><u>Diana Chan, Health and Wellbeing Manager</u></p> <p>The aim of Age UK is for older people to improve their health and wellbeing to get most from their later life and enable them to become resilient to manage the challenges they may face.</p> <p>It is not clear from this application exactly how many people in Woking will be supported with this £10,000. I am also conscious, that many other charities and organisations are implementing similar befriending services and telephone helplines. Some of what is being described here is quite similar to some of what our social prescribing team do. They refer to an experienced Wellbeing Co-ordinator to make an initial assessment and then signpost them which is really similar to social prescribing. The home visiting element of this proposal would no doubt make a difference to vulnerable and isolated residents – but this is dependent on covid restrictions. I would recommend a smaller amount of £5,000 is granted.</p>	
3.3 Assessment	<p>Age UK Surrey states in its application that it is well placed to deliver a holistic service to Woking residents. Its services are delivered according to need: Befriending / Digital / Advice / Help at Home, with signposting also taking place to other specialist organisations as required, particularly regarding mental health.</p> <p>For residents of Woking, 19.5% of households have only people aged over 65 years old residing within them. The Charity notes that the fastest growing cohort of people are the post war baby boomers who are now reaching their 70s. Around 37% of clients are over the age of 85.</p> <p>Older people are feeling more vulnerable due to Covid-19. Although those shielding can now leave home, many are still anxious and worried to do so and their confidence has been reduced. There has been a threefold increase in calls to the Group's helpline over the past five months from people living across the County.</p> <p>Many clients are experiencing issues such as bereavement, loss of family or connections with friends. Sometimes health matters are</p>	

Age UK Surrey – Application For Financial Assistance

being dealt with in tandem such as loss of mobility; dementia; sensory impairment; Parkinson's; heart and lung conditions, mental ill-health; and diabetes.

The majority of clients which benefit from the work of the Charity do not have access to technology (for example, internet and apps) which would help them to keep connected 'virtually' to friends, family and online learning or entertainment. Most users rely mostly on their televisions for connection to the outside world, thereby creating very limited opportunities to talk and chat with family and friends.

Liaison takes place with agencies such as Surrey County Council, NHS Surrey and voluntary sector organisations. In addition, the Charity sits on the Dementia Strategy Committee for Surrey.

Monitoring takes place to establish the number of people accessing the service and the number of volunteers supporting. It will contact both the client and volunteer to obtain feedback within 12 weeks to obtain initial feedback and conduct further follow-ups as required.

The impact on the wider community includes:

- Reduced pressures on GPs and the NHS
- Increased community cohesion through volunteer support
- Purposeful role and new learning opportunities for the volunteer
- Provides additional peace of mind to family members and carers.

The work of the Charity also gives purpose to and experience of working with older people for volunteers.

The opportunities for the Charity to fundraise have reduced significantly since March 2020. Over the past year, a fundraising lunch was held for Older People's Day; donations were raised from a Carol Concert at Guildford Cathedral; a new fundraising campaign was launched under the banner of 'Alone Together'.

Age UK Surrey has applied for a revenue grant of £10,000 towards a regular social contact 'telephone lifeline' and, once possible, a home visiting service to enable befriending to take place between the Group's volunteers and the service users, with a third being over the age of 85 years old and often with existing medical conditions.

Taking into account the consultee comments which note the benefit which would be received by vulnerable and isolated residents, it is recommended that a one-off contribution of £5,000 be made towards the costs of the telephone helpline and that the quarterly monitoring submitted by the organisation should set out clearly the number of people living within the Borough who have received the befriending calls.

REPORT ENDS