

**FRIENDS OF THE ELDERLY – APPLICATION FOR FINANCIAL ASSISTANCE**

**Executive Summary**

Established in 1905, Friends of the Elderly supports older people to live life well through residential care, homecare, day centres, community projects, community engagement and grant giving.

Prior to Covid-19, the existing ‘Community Connector’ service operated by Friends of the Elderly helped re-connect older people to their communities through group events, local partnerships and one-to-one befriending. Despite face-to-face activities currently being on hold, it has adapted the service and increased volunteering hours by 43% compared with last year.

This year, the organisation is applying for funding of £9,807 towards the salary of its full-time Volunteer Coordinator, who makes around 30-40 phone calls to service users and volunteers each week. The postholder also liaises with the local Council and around 15 partner organisations, receiving and making referrals where necessary and signposting to community assets.

The service offers vital practical and emotional support to older people in Woking. Many older people have already experienced loneliness and social isolation, and now face further challenges due to the ongoing Covid-19 pandemic. Included are shopping assistance, monthly postal newsletter, and telephone befriending services provided since March 2020, all of which have been specially designed to meet the demands of the present situation with regards to Covid-19. As and when it becomes safe to do so, it is intended to re-introduce face-to-face befriending and other in-person activities based on a phased approach via one-to-one accompanying for solo or small group trips in the community.

Within Woking, the Group is currently providing a regular telephone befriending service to 56 older people, of whom 25 benefit from the shopping assistance scheme (food, medications and other essentials). Over the course of the 2021/22 financial year, it is intended to take on several new referrals, increasing the overall number of service users to 60.

Noting the vital work undertaken by the Group, and in particular during the Covid-19 pandemic, it is recommended that a grant of £5,000 be awarded to the organisation, set at the same level as the previous year.

**Recommendations**

The Executive is requested to:	<b>RESOLVE That</b> , subject to the outcome of the Council’s budgetary process, funding of £5,000 be awarded from the Community Grants Budget towards the salary of the Volunteer Co-ordinator.
Reason for Decision	The Befriending Service will support the Council’s Health and Well Being priority areas as well as complementing the Council’s Social Prescribing service.
Legal Authority	S142 Local Government Act 1972
Confirmation of funding	This award is provisionally made on the expectation that the Council’s budgets for revenue and capital projects remain at the same level

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	<p>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>
<p>Conditions</p>	<p><b>Accounts.</b> 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><b>Monitoring Information.</b> 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><b>Publicity.</b> Where possible, the Organisation is required to publicise the support received from Woking Borough Council, including on websites and literature / leaflets produced.</p> <p><b>Payments.</b> Unless exceptional circumstances exist all invoices must be received quarterly with monitoring information for the previous quarter.</p> <p><b>Payment Period.</b> 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><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> 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>
<p>Performance Indicators</p>	<p><b>Users.</b> The Organisation to provide a breakdown of the users.</p> <p><b>Activities.</b> The Organisation to provide details of activities and events held.</p> <p><b>Publicity.</b> The Organisation to advise how the Council's support has been publicised.</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>

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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>
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**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

## **Friends of the Elderly – Application For Financial Assistance**

## Friends of the Elderly – Application For Financial Assistance

<b>1.0 Summary of Application</b>	
1.1 Status and Aims	<p>Friends of the Elderly is a registered charity founded in 1905 and is one of the UK's oldest charities supporting older people.</p> <p>The Charity supports older people to live life well through residential care, homecare, day centres, community projects, community engagement and grant giving.</p> <p>Its community services support people to remain living independently in their own homes whilst its care homes provide residential, nursing and specialist dementia care for those who need more support. It also aims to reduce loneliness across communities with a range of volunteer led activities and services. For those on a low income, the Charity's grants service assist older people with the unexpected costs of daily living and staying connected with their communities.</p> <p>The Charity's aims are:</p> <ul style="list-style-type: none"> <li>○ To ensure older people have access to safe, high quality care and support services.</li> <li>○ To ensure older people in the community have access to social support, activity and opportunities to combat loneliness.</li> <li>○ To operate services sustainably and ethically to safeguard the charity's legacy, and its future.</li> </ul>
1.2 Employees	<p>Two members of staff are employed to carry out community services in Woking: a Volunteer Co-ordinator and a Befriending Development Manager. The Volunteer Co-ordinator has direct and daily contact with volunteers and service users. The Befriending Development Manager has direct contact with service users and oversees the project. Both are employed on a full-time basis (35 hours per week) and work closely together.</p>
1.3 Volunteers	<p>53, whose activities include one to one befriending, shopping assistance, letter writing and penpal scheme, community connector service, activities with users such as singing or nail painting, and events such as outings to local places of interest.</p>
1.4 Clients/Users	<p>57, comprising:</p> <ul style="list-style-type: none"> <li>11 male</li> <li>46 female</li> <li>51 disabled</li> <li>1 ethnic minority</li> <li>56 resident in Woking</li> <li>2 aged 19-65</li> <li>55 aged 65+</li> </ul> <p>The befriending service, including the community connector role, shopping assistance, regular telephone calls and home visiting is</p>

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	<p>offered at no cost to the service user.</p> <p>There is no fixed rate for outings but a contribution of £5 per monthly outing is suggested to help cover transport and entry costs. For special quarterly events a contribution of £10 is suggested towards the cost of meals and entertainment. The events are currently on hold due to the pandemic.</p>																																	
1.5 Members	N/A																																	
1.6 Sum Requested	£9,807 (Revenue)																																	
1.7 Project	<p>The project will offer vital practical and emotional support to older people in Woking. Many older people have already experienced loneliness and social isolation, and now face further challenges due to the ongoing Covid-19 pandemic. The Group is applying for funding to cover 35% of the Volunteer Coordinator's salary and associated costs.</p> <p>The project has two aspects which link together:</p> <ol style="list-style-type: none"> <li>1) The Group will maintain and develop the shopping assistance, postal newsletter, and telephone befriending services provided since March 2020, all of which have been specially designed to meet the demands of the present situation with regards to Covid-19.</li> <li>2) As and when it becomes safe to do so, it is intended to re-introduce face-to-face befriending and other in-person activities based on a phased approach via one-to-one accompanying for solo or small group trips in the community.</li> </ol> <p>These two combined aspects will not only offer support during a period of increased isolation and anxiety, but will help foster a sense of continuity and hope, with something to look forward to as the current situation begins to ease. The provision of one-to-one support would build older people's confidence to venture out into local places of enjoyment, such as shops, cafés and parks. To achieve this, an accompanying service will be available.</p>																																	
1.8 Cost breakdown:	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Item applied for</th> <th style="text-align: right;">Cost</th> <th style="text-align: right;">WBC Sum</th> </tr> </thead> <tbody> <tr> <td>Volunteer Coordinator</td> <td style="text-align: right;">£25,844</td> <td style="text-align: right;">35% = £9,045</td> </tr> <tr> <td>Befriending Development Manager</td> <td style="text-align: right;">£31,976</td> <td style="text-align: right;">£0</td> </tr> <tr> <td>Recruitment of 1 volunteer</td> <td style="text-align: right;">£250</td> <td style="text-align: right;">35% = £88</td> </tr> <tr> <td>Postage of monthly newsletter</td> <td style="text-align: right;">£772.8</td> <td style="text-align: right;">35% = £270</td> </tr> <tr> <td>Printing and stationery costs</td> <td style="text-align: right;">£1,154</td> <td style="text-align: right;">35% = £404</td> </tr> <tr> <td>Wireless card readers</td> <td style="text-align: right;">£378</td> <td style="text-align: right;">£0</td> </tr> <tr> <td>Float for shopping assistance</td> <td style="text-align: right;">£1000</td> <td style="text-align: right;">£0</td> </tr> <tr> <td>Central overheads at 20%</td> <td style="text-align: right;">£12,275</td> <td style="text-align: right;">£0</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">£73,650</td> <td style="text-align: right;">-</td> </tr> <tr> <td><b>Total applied for</b></td> <td style="text-align: right;"><b>-</b></td> <td style="text-align: right;"><b>£9,807</b></td> </tr> </tbody> </table>	Item applied for	Cost	WBC Sum	Volunteer Coordinator	£25,844	35% = £9,045	Befriending Development Manager	£31,976	£0	Recruitment of 1 volunteer	£250	35% = £88	Postage of monthly newsletter	£772.8	35% = £270	Printing and stationery costs	£1,154	35% = £404	Wireless card readers	£378	£0	Float for shopping assistance	£1000	£0	Central overheads at 20%	£12,275	£0	Total	£73,650	-	<b>Total applied for</b>	<b>-</b>	<b>£9,807</b>
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1.9 Community Benefit	<p>A total of 56 older people in Woking currently benefit from the remote befriending service, which has had to be adapted for Covid-19. This includes weekly telephone calls and a monthly postal newsletter. Of these, 25 people benefit from the shopping assistance scheme.</p> <p>Going forward, the Group anticipates taking on approximately four</p>																																	

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	<p>new referrals for these services during the first nine months of the 2021/22 financial year. This would take the total number of service users benefiting from our remote services to 60.</p> <p>When face-to-face activities start to be phased back, it is anticipated that 65% of the 60 service users would benefit from individual accompanying (trips to local shops, cafes and other places of enjoyment), equating to 39 older people living in the Borough.</p> <p>In terms of small group activities, which the Charity hopes to re-introduce as and when it becomes safe to do so, it is expected that around 60% of service users would benefit, equating to approximately 36 older people in Woking.</p>
<p>1.10 Covid-19 Impact</p>	<p>It should be noted that the Charity's main source of income is running care homes for older people, and so its day-to-day operations have been severely impacted by COVID-19. The effects have included lower rates of admission and enquiries, increased expenditure associated with enhanced PPE protocols (an extra £40,000 per month), and additional staff costs due to sick leave, overtime and other incentives.</p> <p>In terms of the community services delivered in Woking, the Group has had to suspend face-to-face activities. In adapting its work to the present situation, new ways of working have been established whilst successfully increasing the level of volunteering hours compared with normal periods.</p> <p>The Covid-19 pandemic has heightened the challenges of loneliness. Many of the older people supported have no one else to turn to during this uncertain time. 30% of service users (17 individuals) have little or no family support. Due to continued shielding for health reasons, some older people are finding themselves cut off from the types of activity that bring meaning to their lives, whether communal activities, recreation, exercise, or just day-to-day interactions.</p> <p>Initial conversations with service users have suggested that many have lost confidence to venture out into the community and are still feeling considerable anxiety about the situation.</p>

<h3>2.0 Financial Background</h3>	
<p>2.1 Budget</p>	<p>At the time of the application, the Group held £2.8m in the bank. The sum of £1.1m is reserved as care home deposits with £1.2m classed as restricted funds.</p> <p>The Group has submitted a budget for 2021/22 which shows an anticipated income of £20,927,599 against an anticipated expenditure of £21,917,469, resulting in an anticipated deficit of £989,870. The vast majority of income and expenditure relates to operation of the care homes.</p>
<p>2.2 Accounts</p>	<p>The Group has submitted accounts for 2019/20 which show an income of £23,159,000 (£22,933,000 in 2018/19) against expenditure of £22,306,000 (£23,819,000 in 2018/19), resulting in a surplus of £853,000 (a deficit of £886,000 in 2018/19). The sum of £38,711,000</p>

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	was carried forward at the end of the 2019/20 year.
2.3 Support over the past five years	2020/21 – £5,000 towards the Community Connector Service 2019/20 – no grant awarded (the application was for a much wider programme than the previous year) 2018/19 – £10,000 towards the Community Connector Service

<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>	<ul style="list-style-type: none"> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>No</li> <li>Yes</li> <li>No</li> <li>Yes</li> <li>N/A</li> <li>Yes</li> </ul>
3.2 Consultee Comments	<p><u>Diana Chan, Health and Wellbeing Manager</u></p> <p>Friends of the Elderly is one of the UK's longest standing charities supporting older people to live well.</p> <p>Their community services help people to live independently in their own homes, while our care homes provide residential, nursing and specialist dementia care for those who need more support. We aim to reduce loneliness across our communities through a range of volunteer-led activities and services. For older people on low incomes, our grants service helps meet the costs of essential household items, including laptops, phones and tablets to stay digitally connected.</p> <p>In Woking, clients utilise the day care services of the Bradbury Centre, which provide a range of activities to suit people's needs and interests. Their compassionate team are trained to support people with dementia.</p> <p>Woking Borough Council Social Prescribers, will often refer and signpost clients to the services of Friends of the Elderly, particularly for their befriending services. Before Covid, this was a service that was much needed, and a referral would mean at least a three month wait before an individual could access this type of support due to the demand upon the service. During the pandemic and beyond, social isolation and loneliness is predicted to be an important issue for our elderly population, particularly, if they live alone or do not have relatives nearby to carry out the daily tasks of shopping and attending</p>	



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	<p>activities that are essential to maintain health and wellbeing.</p> <p>I am fully supportive of the £5,000 being awarded to support the community connector service that will enable Friends of the Elderly to conduct this important work for our vulnerable residents in the Borough.</p>
3.3 Assessment	<p>Prior to Covid-19, the existing 'Community Connector' service operated by Friends of the Elderly helped re-connect older people to their communities through group events, local partnerships and one-to-one befriending. Despite face-to-face activities currently being on hold, it has adapted the service and increased volunteering hours by 43% compared with last year.</p> <p>Within Woking, the Group is currently providing a regular telephone befriending service to 56 older people, of whom 25 benefit from the shopping assistance scheme (food, medications and other essentials). Over the course of the financial year 2021-22, it is intended to take on several new referrals, increasing the overall number of service users to 60.</p> <p>At the centre of the service are the 53 volunteers who deliver a total of 117 hours of support each week, an increase from 82 hours last year. Around 80% of volunteering time is spent on phone calls, with the remaining allocated to shopping assistance. The monthly postal newsletter provides another means of staying connected, with quizzes, poems, historical facts etc, as well as greetings cards with surprises such as seeds to plant and special treats on birthdays.</p> <p>To alleviate the worries of getting by during this difficult period, a limited non-recoverable float has been established, so that no-one benefiting from the services has to worry about not being able to pay back daily expenses. This is further bolstered by a referral system to the Group's low-income grants programme. An investment in several digital card readers, as well as enhanced PPE protocols, allows the service to be delivered safely and securely.</p> <p>As face-to-face activities come back after Covid-19, the Group will aim to bolster older people's connections to the local community through one-to-one accompanying trips (e.g. shops, cafés and parks) and, in time, to host smaller group activities. There are a handful of volunteers who are already accompanying service users on trips within the local community. These volunteers and service users having formally opted into each other's 'bubbles', providing a valuable example for how face-to-face activities might be implemented going forward.</p> <p>Friends of the Elderly is applying for funding of £9,807 towards the salary of the full-time Volunteer Coordinator, who makes around 30-40 phone calls to service users and volunteers each week. The postholder also liaises with the local Council and around 15 partner organisations, receiving and making referrals where necessary and signposting to community assets.</p> <p>Noting the vital work undertaken by the Group, and in particular during the Covid-19 pandemic, it is recommended that a grant of £5,000 be awarded to the organisation, set at the same level as the previous year.</p>

REPORT ENDS