

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 2021/22 by way of a reduced grant of £1,950 to enable the Charity to continue its training programme for volunteers in the Borough, which is currently being undertaken remotely via Zoom. Last year the Group applied for and was awarded the sum of £2,500. 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.

Prior to the pandemic the Charity’s work was focused on providing a supportive ear and practical help to people living in Surrey facing a life-threatening diagnosis. Its users have found lockdown, and shielding, especially tough. Those who were midway through cancer treatments have invariably found their therapies being halted, and support groups in settings such as community halls have been forced to stop, meaning social interaction being cut.

The pandemic has incurred significant hardship costs for The Brigitte Trust. It has seen a huge fall in income from one-off donations (which usually equates to around £30,000 per annum), funeral donations (usually around £5,000) and fundraising events and activities (usually around £12,000). Last year the income from these sources amounted to just £47,000, with significantly more being budgeted for. One-off donations and fundraising income are expected, albeit drastically reduced.

It is considered that the Trust provides an invaluable service, providing emotional support and practical help to individuals with a life threatening illness. During the past 12 months, the Charity has provided specialist support and practical help to 18 individuals and their families within the Borough of Woking. The Trust works closely with organisations such as Woking and Sam Beare Hospice. Over the past 12 months a total of 57 referrals have been received from the Borough of Woking, 20 of which were in the most recent quarter.

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 £2,000 is awarded for 2021/22.

Recommendations

The Executive is requested to:

RESOLVE That, subject to the outcome of the Council’s budgetary process, a grant of £2,000 be awarded from the Community Grants Budget 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

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	Borough through the recruitment of additional volunteers.
Legal Authority	S137 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 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.</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 all literature and leaflets produced.</p> <p>Payments. 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>Payment Period. 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>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. 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	Users. The Organisation to provide a breakdown of the users in the past quarter.

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	<p>Activities. The Organisation to provide details of activities and events held during the last quarter.</p> <p>Training. The Organisation to provide a quarterly update on its training programme, including the number of Woking residents trained as volunteers.</p> <p>Publicity. The Organisation to advise how the Council's support has been publicised over the last quarter.</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.

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1.0 Summary of Application	
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	Five comprising: Charity Manager (21 hours per week), Promotions manager (16 hours per week), Charity Administrator (21 hours per week), Service Co-ordinator (30 hours per week), and Training and Volunteer Support Officer (24 hours per week).
1.3 Volunteers	<p>136.</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>171, comprising:</p> <p>41 male</p> <p>130 female</p> <p>27 ethnic minority</p> <p>18 resident in Woking:</p> <p>6 aged 19-65</p> <p>12 aged 65+</p> <p>The services are provided free of charge.</p>
1.5 Members	<p>120, comprising:</p> <p>20 male</p>

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	<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	£1,950 (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. The training sessions are currently taking place by Zoom.</p>
1.8 Cost breakdown:	<p><u>Costs of Volunteer Training Programme</u></p> <p>Advertising for volunteers - £520</p> <p>Taster course - £120</p> <p>Training sessions – comprising of ten intensive sessions - £640</p> <p>Contribution towards the administration and management - £670</p> <p>Total for one course - £1,950</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 seven volunteers in Woking, providing them with important life skills they can use within their own professional and personal lives.</p>
1.10 Covid-19 Impact	<p>Prior to the pandemic the Charity’s work was focused on providing a supportive ear and practical help to people living in Surrey facing a life-threatening diagnosis.</p> <p>When lockdown began, telephone calls were received from people in the County who were not physically unwell, but who were struggling to cope with the emotional factors of lockdown, for example those anxious about Covid-19, exacerbated by an inability to meet friends and family; those whose previous mental health issues had been brought to the surface by the lockdown; older people who now had no-one to talk to as they were unable to leave their homes; and those stuck at home with abusive partners.</p>

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	<p>This led the Charity to speak to its referring partners, volunteers and Board to see whether the scope of its work could be expanded to help those truly in need during the pandemic.</p> <p>The people traditionally supported have found lockdown, and shielding, especially tough. Those who were midway through cancer treatments have invariably found their therapies being halted, and support groups in settings such as community halls have been forced to stop, meaning social interaction being cut.</p> <p>The pandemic has incurred significant hardship costs for The Brigitte Trust. It has seen a huge fall in income from one-off donations (which usually equates to around £30,000 per annum), funeral donations (usually around £5,000) and fundraising events and activities (usually around £12,000). Last year the income from these sources amounted to just £47,000, with significantly more being budgeted for. One-off donations and fundraising income are expected, albeit drastically reduced.</p>
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2.0 Financial Background	
2.1 Budget	<p>At the time of the application, the Group held £104,365 in the bank. The Trust is 20 months into a five year lease and has an obligation of around £50,000 over the five year period. 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 2021/22 which shows an anticipated income of £192,885 against an anticipated expenditure of £174,196, resulting in an anticipated surplus of £18,689.</p> <p>Anticipated income includes grant income (£137,304) and fundraising (£25,200). Items of expenditure include operational costs (£67,558), promotions and fundraising (£34,428), administration costs (£35,322) and premises costs (£12,780).</p>
2.2 Accounts	<p>The Group has submitted draft accounts for 2019/20 which show an income of £249,048 against expenditure of £144,683, resulting in a surplus of £104,365. The sum of £228,249 was carried forward at the end of the 2019/20 year.</p> <p>The Group notes that fundraising has been significantly affected as a result of Covid with a huge fall in income from one-off donations, usually equating to around £30,000 per annum; funeral donations, usually around £5,000 per annum; and fundraising events and activities, usually around £12,000 per annum.</p> <p>Last year the income from these sources therefore totalled £47,000 and a similar level had originally been budgeted for in the current year.</p>
2.3 Support over the past five years	<p>2020/21 – £2,500 2019/20 – £3,000</p>

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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 No Yes No Yes N/A Yes
3.2 Consultee Comments	<p><u>Diana Chan, Health and Wellbeing Manager</u></p> <p>The trust provides emotional and practical support to individuals and their families who are facing a life threatening diagnosis, across Surrey. They have 114 trained volunteers supporting approximately 75 people at any one time. On an annual basis, 200 individuals and their families receive help from the trust.</p> <p>Since the pandemic, the Trust have now extended their support to those who are socially isolated, some of these clients may have a terminal diagnosis. These individuals were: struggling with the emotional factors of lockdown, may have had previous mental health issues which had resurfaced, those struggling as they could not get out to see friends and family, isolated older people and people who may be stuck at home with an abusive partner.</p> <p>The Trust therefore expanded their remit so they now support anyone who is significantly affected by the pandemic and at risk of becoming socially isolated including: those with a life-threatening diagnosis; the lonely and isolated; victims of domestic abuse; new mothers; the bereaved and carers. They do this via their new telephone befriending service.</p> <p>I am supportive of the recommendation to provide £1,950 of the £2,500 requested funding to enable volunteer recruitment. This is particularly important as the pandemic continues, and there will be more of our borough residents who find themselves isolated and in need of practical and emotional support.</p>	
3.3 Assessment	<p>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.</p> <p>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</p>	

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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 Charity reports that 97% of its clients would recommend its service to others.

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 training is currently undertaken by Zoom.

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.

Between August 2019 and March 2020, 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 Shanley Foundation Trust and the Leathersellers' Company.

The Trust provides an invaluable service, working with organisations such as Woking and Sam Beare Hospice.

The request before the Executive is seeking a contribution of £1,950 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 £2,500.

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 £2,000 is awarded for 2021/22.

REPORT ENDS