

WOKING AGE CONCERN – APPLICATION FOR FINANCIAL ASSISTANCE

Executive Summary

Formed in 2005, Age Concern Woking provides a friendship service and an information and support line. The Group has applied for a grant of £20,000 as urgent funding is required for the charity to continue its work with supporting older, isolated and/or vulnerable residents within the borough of Woking

The Group has indicated that the increasing demand, following the impacts of Covid, for its services demonstrates that it is valued by the community. The flexibility of its operation means that it can often visit people at short notice and is prepared to take on cases which others may not be equipped to handle. It is the only formally organised Friendship Service in the Borough and there is a waiting list for the service. The Group is in touch with many organisations working with older people in the Woking area, in particular referrals to and from Homelink and Careline.

Woking Age Concern sold a flat which had been bequeathed to it and has been using the funds to cover its annual deficit of around £45-50,000 over recent years. The funds are close to running out and, if no grant award was made by the Council for the 2021/22 financial year, the Charity would have a negative balance of £17,500 at the end of the year, and so it would not be able to operate for the full year. It is noted that the Group provides a service greatly valued by its users, moreso during the current Covid-19 pandemic, and supported in the consultee comments from the Health and Wellbeing Manager, Diana Chan, and also by the Home Independence Manager, Julie Meme. Historically, the Council has awarded the Group an annual grant of circa £5,000 towards its core costs, however the Charity requires a higher annual amount of £20,000 to survive.

Community Services are currently working with the Group to help it become more sustainable and self-funding in the future. The Group has also met with the Council’s Funding Officer, Liz Macintyre, to discuss possible alternative sources of funding in the future. Given the discussions taking place, and the strong community benefit, it is proposed that the Group be awarded a revenue grant of £20,000 for next year.

It should be noted that one of the standard conditions of grant relates to Joint Working, and the Group is required to work with the Home Independence Manager and the Funding Officer to become more financially sustainable. It is not anticipated currently that the Council would be able to make a similar award next year, noting that in past years the level of revenue funding awarded has been up to a maximum of £5,000.

Recommendations

The Executive is requested to:

RESOLVE That, subject to the outcome of the Council’s budgetary process, a grant of £20,000 be awarded from the Community Grants Budget towards the operating costs of Woking Age Concern.

Reason for Decision

To enable the Group to survive the next financial year and become more financially sustainable.

Legal Authority

S142 Local Government Act 1972

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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>In addition, the Group is to work with the Council's Home Independence Manager and the Council's Funding Officer to become more sustainable and self-funding.</p> <p>Invoices / Receipts. In order to claim an element of the funding, the Organisation must submit paid invoices or receipts relating to equipment purchased or services provided.</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>

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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>Enquiries. The Organisation to provide a breakdown of the enquiries received.</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.

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1.0 Summary of Application	
1.1 Status and Aims	<p>Age Concern Woking formed in 2004 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	4, comprising of a Senior Client Liaison Officer (15 hours per week), Client Liaison Officer (6 hours per week) and two Support Officers (28 hours each per week).
1.3 Volunteers	50. The volunteers visit lonely older people in their own homes for at least an hour, on a weekly basis. They offer friendship and support and report back any concerns. Some volunteers will also assist in emergency situations, such as early discharge from hospital with no help.
1.4 Clients/Users	<p>100, comprising:</p> <p>17 male</p> <p>83 female</p> <p>100 disabled</p> <p>1 ethnic minority</p> <p>100 resident in Woking</p> <p>3 aged 19-65</p> <p>97 aged 65+</p> <p>All services are free of charge to the users.</p>
1.5 Members	None.
1.6 Sum Requested	£20,000 (Revenue)
1.7 Project	Previously Age Concern Woking received rental income from a flat that was previously donated however since the flat was sold, the amount of income has decreased resulting in continuous deficit of recent years. Urgent funding is required to allow the charity to survive and continue its work with supporting older, isolated and/or vulnerable residents within the borough of Woking.
1.8 Cost breakdown:	Funding would assist with covering staffing and overhead costs.
1.9 Community Benefit	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 received 920 calls in 2018/19 requesting information or support. Many calls are from people who do not have access to internet based

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	<p>helplines.</p> <p>The main queries of client calls during 2019/20 were about the following; general (45%), friendship service (7%), concerns for someone (8%), help at home (7%), handyperson (5), financial (4%) and Covid-19 shopping (2%). Over 12% of the calls to the Group's information and support line are referred directly to the Council, for example Homelink, Careline and Community Meals.</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 level of phone calls received demonstrate the need for its services. The Group works with Moorcroft and local agencies including Careline, CAB, Homelink, Home Support, Community Meals and GPs. The Charity believes their services help relieve some of the strain off other, more specialised agencies.</p> <p>Through the application, Age Concern Woking is seeking funding to be able to continue supporting clients, old and new, following the impacts of Covid. In excess of 750 older people would benefit from the information and support service.</p>
1.10 Covid-19 Impact	<p>The knock-on effect from Covid resulted in all face-to-face fundraising to be put on hold and with the Charity having to heavily rely on social media, something the older generation may not often use. There were also concerns that consumers spending habits may change which would have a negative impact, as the Group relies on donations from members of the public.</p> <p>Following the impacts of Covid, the Charity aims to increase the length and frequency of visits to clients when it is safe to do so. This will help those who feel even more isolated than normal due to lockdown guidelines. It is also anticipated that there may be new clients (including referrals from Woking Borough Council) who up until Covid-19 did not need the services however after months of assistance from others, will now likely require help and support.</p>

<h3>2.0 Financial Background</h3>	
2.1 Budget	<p>At the time of the application, the Group held £69,262 in the bank. The sum of £35,000 is reserved for salaries, £5,309 reserved for the Co-op Community Fund Special Projects and £2,500 from Coronavirus Response Funding to support the essential running costs during Covid-19.</p> <p>The Group has submitted a budget for 2021/22 which shows an anticipated income of £24,000 against an anticipated expenditure of £74,880, resulting in an anticipated deficit of £50,880.</p> <p>Anticipated income includes donations (£24,000). Items of expenditure include salaries (£61,000), staff/volunteer travel (£3,400), rent and bills (£3,600), telephone/internet (£2,800) and stationery supplies (£1,400).</p>
2.2 Accounts	<p>The Group has submitted accounts for 2019/20 which show an income of £22,000 (£14,361 in 2018/19) against expenditure of</p>

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	£65,900 (£62,947 in 2018/19), resulting in a deficit of £43,900 (a deficit of £48,586 in 2018/19). The sum of £81,375 was carried forward at the end of the 2019/20 year.
2.3 Support over the past five years	2020/21 – £5,000 2019/20 – £5,000 2018/19 – £2,000 2017/18 – No grant awarded 2016/17 – £5,000

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 <p>*Discretionary rate relief & Concessionary rent – Age Concern Woking are a commercial tenant of a property owned by Woking Borough Council.</p>	<p>Yes</p> <p>Yes</p> <p>No</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>No</p> <p>No</p> <p>Yes</p> <p>Yes</p> <p>N/A</p> <p>N/A</p>
3.2 Consultee Comments	<p><u>Diana Chan, Health and Wellbeing Manager</u></p> <p>Woking Age Concern is our most supportive voluntary sector group in Woking. As it is based in Moorcroft and we help with training and contacts we have a very close relationship that has definitely paid off dividends for our residents. The Group is a great source of referrals to our services and likewise we regularly refer to them when appropriate. The teams within Home Independence to include: Social Prescribing, Careline and Independent Support regularly refer to Age Concern, mainly for befriending services, but also for assistance in finding a cleaner or a gardener for a client.</p>	
3.3 Assessment	<p>Formed in 2005, the main activities of Age Concern Woking are a friendship service and an information and support line. The Group is applying for a grant of £2,000 capital for two laptops and office equipment and £3,016 revenue to increase staff hours by 4 hours per week, which would assist the Group with improving its service. 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</p>	

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supported throughout the Borough by approximately 140 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.

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 a lack of joint working across the wellbeing network along with some incorrect or outdated information being provided. However, in 2018/19 it was felt that these issues had been rectified and a grant of £2,000 was awarded.

The main queries of client calls during 2018/19 were about the following; general (26.5%), friendship service (12.7%), concerns for someone (10.1%), help at home (7.6%), handyperson (6.7%), gardener (6.4%) and shopping/transport (5.1%). Over 12% of the calls to the Group's information and support line are referred directly to the Council, for example Homelink, Careline and Community Meals.

Community Services are currently working with the Group to help it become more sustainable and self-funding in the future. The Group has also met with the Council's Funding Officer, Liz Macintyre, to discuss possible alternative sources of funding in the future. Given the discussions taking place, and the strong community benefit, it is proposed that the Group be awarded a revenue grant of £20,000 for next year. It should be noted that one of the standard conditions of grant relates to Joint Working, and the Group is required to work with the Health and Wellbeing Manager and the Home Independence Manager to become more financially sustainable.

It is not anticipated that the Council would be able to make a similar award next year, noting that in past years the level of revenue funding awarded has been up to a maximum of £5,000.

REPORT ENDS