

FRIENDS OF THE ELDERLY – APPLICATION FOR FINANCIAL ASSISTANCE

Executive Summary

The Council has received a grant application from Friends of the Elderly for funding to achieve an ambitious development programme to bring its services to a wider community. The programme involves working with partner organisations, encouraging volunteering and increasing the service offer to elderly members of the Community and their families.

The Charity has submitted three funding scenarios, based on differing levels of support by the Council. These options are:

Option 1 – The total annual cost of delivering the Woking hub (£169,762).

Option 2 – Volunteering 100% funded and 50% of the running costs but not the community engagement work (£100,899).

Option 3 – Only the Volunteer Co-ordinator salary would be 100% funded together with all of the volunteer costs along with 30% of the running costs (£58,935)

Under the proposals, the Charity plans to deliver a wide range of events and activities that support older people, staff, volunteers, and the wider community to come together to prevent and overcome loneliness and foster a sense of community spirit in Woking.

In considering the application, Members are reminded that the Executive awarded a grant of £10,000 through the Community Fund in December 2017 to support the development of the Community Connector Service (CCS). The service supports lonely and isolated older people living in Woking, who wish to gain access to and be part of, their local community and is one element of the application now before the Council.

Officer comments received in respect of the application reflect the fact that the services referred to within the funding application encompass services that are already provided in-house, through the Home Independent Living Team, the Family Support Team and the Community Development and Engagement Team. In view of the comments received, it is recommended that no grant should be awarded and that Officers should continue to work with the Charity to explore opportunities to enhance the services already provided by the Council.

Recommendations

The Executive is requested to:

RESOLVE That no grant be awarded.

Reason for Decision

The services for which funding is being sought encompass those which are already provided by the Council.

The Executive has authority to determine the above recommendations.

Background Papers:

2019/20 Application Form.

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1.0 Summary of Application	
1.1 Status and Aims	<p>Friends of the Elderly is a registered national charity founded in 1905 and is one of the UK's oldest charities supporting older people. The Charity provides support for all older people, particularly those in need due to mental or physical frailty, isolation or poverty. The range of personalised care and support services includes care homes, befriending and volunteering schemes and welfare grants.</p> <p>The Charity runs a dementia day centre in Woking for up to 26 people per day where people can come to maintain an active social life, a home care service which currently supports 60 people to live independently at home, and a residential, dementia and nursing home for up to 60 older people. These services are complemented by free outreach services including one-to-one befriending for 27 older people, social activities hosted in 8 sheltered housing schemes for 80 older people, regular monthly outings (average 12 people per outing) and the Charity's new Community Connector support service that currently reaches 15 lonely or isolated older people.</p>
1.2 Employees	<p>There are four paid members of staff: the Director of Community Integration (35 hours per week), the Community Engagement Manager (35 hours per week), the Visiting Friends Manager (35 hours per week) and the Volunteer Co-ordinator (35 hours per week).</p> <p>Friends of the Elderly has 10 trustees who meet at least four times per year, and scrutinise and oversee matters relating to audit and risk, resources and investments, and service delivery. The day to day management of the charity is delegated to the Chief Executive and the Senior Management Team.</p>
1.3 Volunteers	<p>34. The aim of the Charity is to create a community hub by increasing the befriending and volunteering offer, supporting not only those people accessing the services today, but also to encourage new individuals and groups to use the facilities and engage with their peers and members of the wider community.</p> <p>To achieve its aim, the Charity proposes to build up a team of volunteers and deliver a wide range of events and activities that support older people, staff, volunteers, and the wider community to come together to prevent and overcome loneliness and foster a sense of community spirit in Woking. As such, a range of volunteering opportunities has been developed to enable existing and prospective volunteers to be able to identify roles they enjoy or wish to participate in.</p> <p>These include:</p> <ul style="list-style-type: none"> ○ One-to-one befriending of lonely or isolated older people, in the local community and on site within the Woking hub; ○ Organising and delivering group activities for lonely or isolated older people in sheltered housing schemes and within the Woking hub; and ○ Organising and attending monthly outings for older people in the local community and occasionally further afield. <p>An independent evaluation of the befriending service conducted in February 2018 found that the events and outings were delivering</p>

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	<p>demonstrable health and well being outcomes. People reported feeling more mobile and less lonely and isolated, with 66% of people feeling healthier in themselves, whilst 66% said they visited the doctor less and felt 80% more confident.</p> <p>The Charity will be looking at recruiting volunteers who have a talent or skill that they can share; playing a musical instrument, painting drawing or crafting, baking, gardening, etc. An induction programme linked to the service or services they are supporting will be provided to the volunteers, together with on-going support in the form of training, regular supervision and organisation.</p> <p>The Charity works closely with the Woking Volunteering Bureau, Age UK, Young People’s Voluntary Work Organisation and Surrey Choices to recruit new volunteers, as well as local companies.</p>
1.4 Clients/Users	<p>285, comprising:</p> <p>88 male</p> <p>197 female</p> <p>121 disabled</p> <p>29 ethnic minority</p> <p>225 resident in Woking</p> <p>14 aged 19-65</p> <p>271 aged 65+</p>
1.5 Members	None.
1.6 Sum Requested	£169,762 (Revenue)
1.7 Project	<p>The Charity has ambitions to make the Woking site an integrated Community hub, looking to open its doors to new individuals and groups.</p> <p>In 2017, as part of our strategic review, we commissioned the Social Institute for Excellence (SCIE) to undertake an evaluation of how Friends of the Elderly could reach out and engage with the wider community. The report identified core areas for development in Woking:</p> <ul style="list-style-type: none"> ○ Commissioning – Tackling the loneliness and isolation people in care homes often experience. ○ Reaching out to the community – Proactive engagement with the community. ○ Working in partnership – Develop relationships with other voluntary, community and care providers to share facilities (including transport) and widen access to different activities for service users. ○ Facilitating short term support, connecting people affected by loneliness to local services. ○ Joining up existing services. ○ Volunteering, including embedding volunteering in residential

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care.

- Making use of the Friends of the Elderly's physical assets including the Bernard Sunley home and the Bradbury Centre and offer services to the wider community, though it is not a central location. The development of a hub might be able to offer an alternative venue to churches, and offer activities and groups on a wider range of dates.
- Addressing specific gaps in services
- Services for people with dementia and their carers
- Lack of safe spaces in the evening
- Lack of services for men
- Black and Minority Ethnic (BME) community

The research has informed the work of the Charity over the last year and over that time the Charity has:

- Pooled activity resources to develop a site wide activity programme.
- Launched the new Community Connector volunteer role with some financial support from Woking Borough Council. There are currently 15 clients being supported by 15 volunteers.
- Hosted tea parties and themed events.
- Welcomed a local child minders group to the care home to use the café as a meeting point. They now attend once a month and regularly engage with residents.
- Worked with a local music school on a research project with residents.
- Recruited a Community Engagement Manager whose role is to support the development of community partnerships.

The Woking hub of services is now at a stage where the Charity is ready to expand its offer. The objective is to deliver more opportunities for existing service users to engage with their community, grow the Community Connector service and broaden the Charity's support for lonely or isolated older people. This application is seeking funding to support this growth in the Charity's services.

Those who would benefit from the project include residents in the Charity's care homes, clients in the Charity's community services, and service users receiving befriending and grant support. Included in the proposals include:

- a varied and inclusive activity programme utilising the Charity's assets, hosted in the care home and day centre;
- continuing to reach out to those living in local sheltered housing schemes, adding 2 new schemes per year;
- a stakeholder engagement communications programme;
- the promotion of volunteering opportunities;
- increasing the number of Community Connector volunteers to 18, thereby reaching a further 72 older people;
- a transport offer to support people to access the Charity's

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	<p>activities;</p> <ul style="list-style-type: none"> ○ the building of partnerships with the wider community; ○ the development of the inter-generational activities; ○ increasing the creative art activities in our care home and day centre; ○ developing partnerships with local places of interest to offer discounted rates for trips and outings; ○ raising awareness of the Charity’s activities and promoting the available facilities; and ○ hosting informal carers groups and activities. 																																
1.8 Cost breakdown:	<p>Option 1 – Community Engagement and volunteering</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Salaries</td> <td style="text-align: right;">£97,169</td> </tr> <tr> <td>Volunteer costs</td> <td style="text-align: right;">£14,726</td> </tr> <tr> <td>Outing costs</td> <td style="text-align: right;">£2,400</td> </tr> <tr> <td>All events and activities</td> <td style="text-align: right;">£15,514</td> </tr> <tr> <td>Running costs:</td> <td style="text-align: right;">£39,952 (100%)</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">£169,762</td> </tr> </table> <p>Option 1 – The total annual cost of delivering the Woking hub is £169,762. This figure includes 100% of staff salaries, volunteer costs, outings, events and activities along with additional running costs (monitoring and evaluation, central office charges, staff training etc.).</p> <p>The Applicant has indicated, however, that if this level of funding is not possible, the Council is invited to consider two further funding options.</p> <p>Option 2 – Volunteering 100% funded</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Salaries</td> <td style="text-align: right;">£63,797</td> </tr> <tr> <td>Volunteer costs</td> <td style="text-align: right;">£14,726</td> </tr> <tr> <td>Outing costs</td> <td style="text-align: right;">£2,400</td> </tr> <tr> <td>Running costs:</td> <td style="text-align: right;">£19,976 (50%)</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">£100,899</td> </tr> </table> <p>Option 2 – With a total annual cost of £100,899 this would allow for only the volunteering element of the project to be 100% funded, which encompasses all volunteer befriending but not the community engagement work. Within this option the salaries of Visiting Friends Manager and the Volunteer Co-ordinator would be funded together with all of the volunteer costs along with 50% of the running costs (monitoring and evaluation, central office charges, staff training etc.).</p> <p>Option 3. Volunteer coordinator & volunteering costs</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Salaries</td> <td style="text-align: right;">£28,493</td> </tr> <tr> <td>Volunteer costs</td> <td style="text-align: right;">£14,726</td> </tr> <tr> <td>Outing costs</td> <td style="text-align: right;">£2,400</td> </tr> <tr> <td>Running costs:</td> <td style="text-align: right;">£13,316 (30%)</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">£58,935</td> </tr> </table> <p>Option 3 – With a total annual cost of £58,935, this option would allow for only the Volunteer Co-ordinator salary to be 100% funded together with all of the volunteer costs along with 30% of the running costs (monitoring and evaluation, central office charges, staff training etc.).</p>	Salaries	£97,169	Volunteer costs	£14,726	Outing costs	£2,400	All events and activities	£15,514	Running costs:	£39,952 (100%)	Total	£169,762	Salaries	£63,797	Volunteer costs	£14,726	Outing costs	£2,400	Running costs:	£19,976 (50%)	Total	£100,899	Salaries	£28,493	Volunteer costs	£14,726	Outing costs	£2,400	Running costs:	£13,316 (30%)	Total	£58,935
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1.9 Community Benefit	By providing individuals and groups in the local area with a																																

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Community hub where they can access regular events and services, the Charity aims to improve the mental health and wellbeing of local older people, increase social connections and nurture a 'sense of community' in every individual through feelings of membership, influence, integration and fulfilment of needs, and shared emotional connection. Volunteers from the local community will support individuals, and the individuals that they support will in turn be supported to become volunteers themselves.

The care home and day centre will become seen as 'community assets', being used by groups as friendly, safe, secure places to meet, work and enjoy. The older people supported will be encouraged to share their skills and be encouraged to explore their interests. Users will feed in to the development of the community partnerships and events programmes, to ensure they are involved in the direction of the project and it meets their needs.

People benefiting from this project include the residents in the Charity's care homes, clients in the community services, and service users receiving befriending and grant support.

The applicant has indicated that the following numbers of people will benefit in the period April 2019 – March 2020 as a result of the project.

- 90 volunteers will have benefited from supporting the charity through its support on mentoring, training, confidence building and encouragement to seek, if desired, to apply for paid work within their local community.
- 20 corporate volunteers supporting the hub activities.
- 102 individuals by hosting events and activities on site.
- 84 individuals at sheltered schemes – 5 events per month covering 8 sheltered schemes namely, Nightingale, Moyne, Nottingham Court, Shires, Stream Close, Bridge Court, Vale House and Wesco.
- 40 individuals receiving one-to-one befriending.
- 72 additional individuals supported through 864 support sessions by the Community Connector Service. This figure may vary slightly if any service user takes longer than the 3 months to gain confidence to access their local community.
- Friends and family of service users.
- Partnerships with at least 11 community groups, which includes groups of school children, childminder groups and faith based groups

Older people in Woking will benefit from reduced loneliness and social isolation, improved physical, mental health and overall wellbeing, community engagement and participation in the services of the Charity.

2.0 Financial Background

2.1 Budget

At the time of the application, the Group held £1.4m in the bank. The sum of £1.1m is reserved as restricted cash arising from donations or

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	<p>legacies received for specific services or projects that are not yet spent.</p> <p>The Group has submitted a budget for 2019/20 which shows an anticipated income of £23,067,759 against an anticipated expenditure of £23,395,618, resulting in an anticipated deficit of £327,859.</p> <p>Anticipated income includes care homes (£18,930,722), Triangle (£3,032,885), fundraising (£473,720), investment income (£401,823), and rental accommodation (£191,814). Items of expenditure include care homes (£12,137,512), Triangle (£2,629,829), engagement (£491,570), Central Office (£2,410,050), and fundraising (£120,003).</p> <p>Friends of the Elderly Group comprises Friends of the Elderly, Triangle Community Services and the Retired Nurses National Home. The Group is forecast to record a deficit for 2019-2020 as part of a period of reorganisation and reinvestment.</p>
2.2 Accounts	<p>The Group has submitted accounts for 2017/18 which show an income of £26,289,996 (£28,801,050 in 2016/17) against expenditure of £26,941,126 (£26,247,247 in 2016/17), resulting in a deficit of £651,130 (a surplus of £2,553,803 in 2016/17). An additional loss of £312,681 was realised through investments in 2017/18. The sum of £39,361,400 was carried forward at the end of the 2017/18 year.</p> <p>The Charity holds four different types of reserves – general, designated, restricted and endowment. The level of reserves at March 2018 stood at £36,757,069.</p>
2.3 Support over the past five years	2018/19 – £10,000 (Community Fund)

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>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>No</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>N/A</p> <p>Yes</p>
3.2 Consultee Comments	<p><u>Sylvie Marshall, Community Development Manager</u></p> <p>Whilst the services that Friends of the Elderly are offering are very valuable and we work closely with them in a number of areas, the</p>	

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	<p>grant application will encompass services that are already provided in-house primarily by the Home Independent Living Team with activity support provided by the Family Support Team and the Community Development and Engagement Team. It should be explored how Friends of the Elderly could enhance the services already provided by the Council going forwards.</p> <p>Therefore it is recommended that no grant be awarded at this time in order to avoid duplication of service provision.</p>
3.3 Assessment	<p>Friends of the Elderly have applied to Woking Borough Council for funding to achieve an ambitious development programme to bring its services to a wider community. The programme involves working with partner organisations, encouraging volunteering and increasing the service offer to elderly members of the Community and their families.</p> <p>Individual revenue elements of the proposed Woking Hub have been previously individually funded by:</p> <ul style="list-style-type: none">○ Woking Borough Council - Befriending Volunteer Co-Ordinator and Community Connector Service (£10,000)○ Local corporate partners including ADP, JTI and Affinity Water○ Charitable trusts and foundations grants○ Direct Mail Appeals. <p>The Charity has submitted three funding scenarios, based on differing levels of support by the Council. These options are:</p> <p>Option 1 – The total annual cost of delivering the Woking hub (£169,762).</p> <p>Option 2 – Volunteering 100% funded and 50% of the running costs but not the community engagement work (£100,899).</p> <p>Option 3 – Only the Volunteer Co-ordinator salary would be 100% funded together with all of the volunteer costs along with 30% of the running costs (£58,935)</p> <p>Under the proposals, the Charity plans to deliver a wide range of events and activities that support older people, staff, volunteers, and the wider community to come together to prevent and overcome loneliness and foster a sense of community spirit in Woking. The Charity has demonstrated close working with Woking Borough Council, helping to deliver events during the Living Well Week, provide dementia awareness training and understanding event with Dementia Friends and working with Borough Council sheltered housing scheme managers to organise Christmas events at the sheltered schemes every year.</p> <p>The Charity continues to seek funds elsewhere and has recently applied to the Big Lottery Fund's Building Communities Fund for a total of £99,832 over a 27 months period (beginning 01/01/2019) towards the costs of the Woking hub service delivery. A further application will be made to JTI (local corporate partner) in December 2018 for funding support towards the Woking hub. The Applicant has also indicated that the Charity would consider using its 'paid for' services to deliver a proportion of their surplus funds to support the community engagement work.</p> <p>The Friends of the Elderly Group fundraising activities in 2017- 2018</p>

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raised an income of £673,977 through charitable trusts and foundations, corporate support, individual donors, legacies and other funding streams. These activities will continue throughout 2018 - 2019 onwards.

In considering the application, Members are reminded that the Executive awarded a grant of £10,000 in December 2017 to support the development of the Community Connector Service (CCS). The service supports lonely and isolated older people living in Woking, who wish to gain access to and be part of, their local community and is one element of the application now before the Council.

Officers continue to work closely with Friends of the Elderly. Officer comments reflect the fact that the services referred to within the funding application encompass services that are already provided in-house, primarily by the Home Independent Living Team with activity support provided by the Family Support Team and the Community Development and Engagement Team. In view of the comments received, it is recommended that no grant should be awarded and that Officers should continue to work with the Charity to explore opportunities to enhance the services already provided by the Council.

REPORT ENDS