

Main Grants 2017-18 report

Name of organisation	Age Exchange (AE)
Date of meeting	5th September 2016
Names and positions of attendees	Kumar Jacobs - Chair AE Rebecca Packwood - CEO AE Lucy Formolli – Development Officer Cultural Development, LBL James Lee - Head Culture and Community Development, LBL

Group Name:	Total	Q1	Q2	Q3	Q4					
Total funding received 2015-16	£24,375	N/A	£8,125	£8,125	£8,125					
Total funding to be received 2016-17	£32,500	£8,125	£8,125	£8,125						
Outcomes	Support									
	1. Older people participate in inclusive artistic, creative and social activities to improve communication and to enjoy social contact. Have a laugh!M13									
	2. Older carers participate in activities to build self-esteem and resilience									
	Older people participate in a series of 1:1 sessions including Reiki, Indian Head massage, Mindfulness etc., to help to learn relaxation and Have some 'me time'									
	3. Carers participate in 1:1 sessions to learn more about benefits, coping strategies and to increase learning about the illness affecting their family member.									
	4. Older isolated/vulnerable people (carers and cared for) feel more involved in the local community.									
Outputs:	2015-16 Target	2015-16 Q2	2015-16 Q3	2015-16 Q4	2015-16 Total	% Achieved	2016-17 Target	2016-17 Q1	2016-17 Q2	% Achieved TD
3x weekly carers groups providing stimulating and creative activities for older people with caring responsibilities for family members together with the	1080 360 sessions PQ	330	352	422	1104	102%	1140 – participant target	857 participants	N/A	75% - Output on track

person that they care for (60 participants x 48 weeks = 2880 hours of intervention - each session 2 hours)										
Weekly alternative therapy sessions (576 hours of activity - each session 2 hours)	216.54 Sessions PQ	30	108	92	230	106%	288	166	N/A	57% - Output on Track
Health and wellbeing advice from a health and wellbeing coordinator to enable older people to keep them well and engaged with the community that they live in. (1680 hours of advice and advocacy)	1260 hours AA 420 PQ	368	432	366	1166	93% - although this output is below target, this is due to over achievement in other Outputs. please see report for clarification	1680	294	N/A	17.5% - although this target is behind, this is due to over achievement in other Outputs. please see report for clarification
Wide variety of weekly activities for older people (48x 10 hours of meaningful activity = 480 hours)	360 120 PQ	184	211	144	539	149%	480	164	N/A	34% - Output on Track

1. Remove funding from under-performing groups/those performing least well

Have you achieved at least 90% of the agreed reporting outputs and outcomes in all quarters since the start of the programme?

All areas are over 90% and 3 of 4 outputs have been exceeded.

Output 3 - **Health and wellbeing advice from a health and wellbeing coordinator to enable older people to keep them well and engaged with the community that they live in.(1680 hours of advice and advocacy)** is at 93% achieved, due to more emphasis put into output 4 **Provide Wide variety of weekly activities for older people.**

This reallocation of resource has been made based on feedback of client group. Capacity means Age Exchange are not able to fully deliver on both outputs, but Age Exchange reacted to views within their user group and cleared this with monitoring officer and senior manager at the time, with the assurance that they would still endeavour to meet their output 3 target where possible.

Age Exchange presented detailed evidence of their work at the monitoring meeting and were happy to provide more anecdotal evidence in their quarterly monitoring.

Have you achieved all of the wider outcomes outlined in the initial grant application?

AE continually assess their contribution to the wider outcomes in their application and how best to serve the older people of the borough.

AE is very focused in keeping older people active and healthy in their own homes which has a significant impact on carers, supporting carers is a large part of their work over and above delivering sessions.

AE is founding members of the Lewisham Dementia Action Alliance and the Purple Alliance of Dementia Friendly Centres. They Are UK leaders in the field of Reminiscence and Dementia work.

The organisation are very concerned with ensuring that the goals of the charity do not get compromised by the additional requirements on the community hub in Blackheath Village that includes a community café, a library, archives, and the Bakehouse and office space.

The Board of Trustees and CEO are currently strategizing to ensure that the hub is self-funding leaving the charity to focus on its reminiscence arts dementia work as detailed in their original Main Grant Application.

AE are Looking into developing these elements as a community interest company and have clarified their mission and aims for the charity recently.

This clarification of aims and values, focusing on the Reminiscence arts work of the organisation ensures that AE are delivering on the wider outcomes of their original applications and adding value to their application

If no to either of the above:

- what are the mitigating factors?
- what plans are in place for improving performance?
- what progress has been made against actions agreed with your Development Officer?

What are the mitigating factors?

Mitigating factor for lower output on target 3 as above are as follows.

Due to feedback from users and carers, that Age Exchange should focus more on providing a greater number of meaningful sessions and concentrate less on advice.

They have done this, but have still achieved over 90% of output 3 target in spite of this. In order to exceed outputs 1, 2 and 4, output 3 has less resource available.

This was done in discussion with LBL officers during the year, however the output was not changed and although the reasons for not meeting the target were agreed both the officer and organisation, both agreed that the output should be maintained as originally detailed in the application for consistency of approach.

What plans are in place for improving performance?

Age Exchange has worked very hard to improve their offer and outcomes for older people. They have done this through working to strategize and fine tune their mission, aims and objective, they have diversified funding streams and are looking to actively sell their services as leads in the field of Dementia care through reminiscence, working with both Guys and St Thomas's on the Radiql programme, which went through quantitative evaluation from Royal Holloway University.

New Philanthropy Capital is working with Age Exchange to develop a theory of change and measurement framework for their work, which will strengthen their service and charities sustainability primarily through the selling of their services.

Overarching this work is the separation of the Blackheath hub from the main work of the charity which should give more focus to both endeavours.

What progress has been made against actions agreed with your Development Officer?

Age Exchange was asked to diversify their funding streams and have done this to excellent effect – see section below

They were also tasked with becoming more widely connected with the borough as a whole and to be seen less as a hub for Blackheath. They have delivered on this and have made recent partnerships in other areas of the borough including the north and particularly in Catford South.

It should be noted that users come from all over the borough, most notably the highest number of users come from the SE6 postcode. While borough wide delivery has always been core to the organisation, perception has been that Age Exchange serve only their local area community. This is now changing and LBL and other organisations are recognising Age Exchange as delivering a borough wide service.

What local support/evidence of need can you identify for the work you are undertaking?

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The national and local need for Dementia care is overwhelming.

AE has a strong network and are key members of the Lewisham Dementia Action Alliance and work closely with the Lewisham CCG as commissioners of some project work. They are key partners of Bromley and Lewisham Mind and carers Lewisham and Lewisham Mindcare.

Work delivered through Guys and St Thomas's on the Radiql programme has given AE more understanding of the need in Lewisham and beyond and academic research around their project has highlighted that the need is increasing.

2. Negotiate reductions and seek alternative funding streams

Are there any proposals that you can put forward that will deliver significant saving against current expenditure? This can include capital investment to change your delivery/business model.

There are currently no additional plans to change the AE delivery model through capital investment as 11 Blackheath Village, went through a large capital redevelopment in 2011. All core funding comes from fundraising. Age Exchange has employed a part time fundraiser to bring more focus to this.

They are working to ensure that the library and café and centre hire business can be sustainable in its own right and are currently strategizing around making the Blackheath hub a community interest company, with Age Exchange charity being its parent. AE is working with New Philanthropy Capital around developing their services for sale (predominantly training services) which could have a large impact on core funding. They are also looking into accessing personal budgets.

They have maximised their local rental opportunities and are at capacity with office hire space, they rent offices to the Blackheath Society among others.

What alternative funding streams are you already pursuing?

Age Exchange have done excellent work in the last few years accesses a number of large funding streams for example these include: The City Bridge Trust, Lewisham CCG 2015/16, Merchant Taylors- Boones Charity, The Rank Foundation, Merchant Taylors, The Childwick Trust, The Big Lottery Fund – Reaching Communities, Local Sustainability Fund – Office for Civil Society Guy's and St Thomas's Charity, among others. However these tend to be restricted funds.

Age Exchange has a growing 'Friend's' organisation that also take a lead in local fundraising and have their own board and an element of independence from the charity.

Are there any other funding streams that you can identify that the council can support you to access?

Age Exchange are keen to be kept abreast of commissioning opportunities, particularly those for Carers as they are predominantly supporting carers, teaching carers the

techniques of using reminiscence in the home, provide 1-2-1 support. Keeping the carer wellbeing one of the core fundamentals for the charity.

3. Work with groups to consider mergers or asset sharing

Are there any organisations doing similar work to you in the borough who you may consider sharing resources or merging with? Who have you considered/approached?

Age Exchange are currently not looking to be a part of a merger as they have been spending the last year solidifying the base of the charity and will continue to do this over the next 12-18 months as part of the NPC funding.

They would only consider merging with a partner with a stronger balance sheet that could build on their work. They have little capacity for asset sharing with regard space and time. Buildings are being used to best effect. They are happy to offer advice and support to other organisations on service delivery or the effective use of assets.

Are there other groups in the local area that you could share resources with even if they are delivering a different type of service? Again, who have you considered/approached?

As Above. Age Exchange have excellent and very beneficial partnerships, but none that lead to sharing services.

It was put to the group that their expertise in governance, fundraising, managing a complex building, going through a large capital redevelopment would be things that might be a resource for smaller charity to learn from, Age Exchange were happy to discuss skill sharing and advise for other organisations.

What support might you need to move these suggestions forward?

LBL will work with other organisations to facilitate some information sessions meetings with Age Exchange around information sharing and best practice.

4. Pro-rata reductions across all groups

What would a 25% cut in your grants look like in service delivery terms? What are the wider impacts?

As the LBL funding goes directly to support groups the likelihood will be that Age Exchange would either cut or reduce their inspired caring programme.

However they would do whatever it took to avoid this by looking into accessing personal budgets and would hope to limit the impact on users by exploring the possibility 're house' some of the attendees at that session into other groups, delivered under other restricted funding streams by other funders.

Have you modelled this cut and developed an action plan for its implementation?

They are modelling reducing the inspired caring programme to every other week but hopefully offsetting by encouraging the participants to come to the Sunday group which is funded by the Chadwick trust.

They could also consider charging users for some services but this is difficult within established groups.

They also believe that management time leaks into managing the volunteers of the library and café and this could be offset by the move to a community interest company.

Conclusion

Any other comments / areas discussed

There was some discussion regarding the Library provision within the Age Exchange building. The organisation said that it can sometimes be a strain when dealing with the volunteers, however it did not remove any focus from the core work of the charity and Age Exchange are very grateful to the library service for their excellent support.

Conclusion and recommendation

Age Exchange are a professional and focused charity with an experienced Chair, board of Trustees, CEO, staff and over 70 well trained volunteers and are recognised nationally as leaders in the field of reminiscence art in helping people live better with dementia.

AE have exceeded all outputs by over 90% and delivered on all outcomes.

AE have strong partnerships, including with academic institutions, which have provided qualitative and quantitative evidence of the success of their work on the outcomes for older people and the benefits of reminiscence arts on people with dementia and their carers

AE are not prepared to consider a merger at this current time unless this is with a significantly larger, probably regional or national charity, with a strong balance sheet and the ability to nurture AE. The organisation is prepared to share their best practice skills with other organisations.

AE have been very successful in attracting funding for project based work and are looking into creating a community interest company to sure up and separate the Blackheath hub, to be able to put primary focus back into the charity

A 25% cut will impact directly on one or more of the groups delivered, most likely the 'Inspired Caring' group but the organisation are modelling ways to offset this and look for alternatives. There is now a part time fundraiser in post and AE are aiming for all core costs to be covered by these means.

Age Exchange have delivered and exceeded targets and outputs by over 90%, the majority by over 100%. There is a strong need for more dementia services in Lewisham.

It is recommended that Age Exchange receive a pro-rata cut.

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Equalities groups disproportionately impacted by recommendations
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Ethnicity:		Pregnancy / Maternity:	
Gender:		Marriage & Civil Partnerships:	
Age:	x	Sexual orientation:	
Disability:		Gender reassignment:	
Religion / Belief:			

Commentary and potential mitigations:

Age Exchange provide services primarily for older people but also provide significant resources for their families and carers.

The mitigations outlined above will hopeful keep the direct impact of a pro-rate cut to a minimum.