

Main Grants 2017-18 report

Name of organisation	Age UK Lewisham and Southwark
Date of meeting	2 nd September 2016
Names and positions of attendees	John Veness, Treasurer Jacky Bourke-White, Chief Executive Susan Underhill, Deputy Chief Executive Winston Castello, Community Enterprise Manager, LB Lewisham

Group Name:	Total	Q1	Q2	Q3	Q4					
Total funding received 2015-16	£72,000	N/A	£24,000	£24,000	£24,000					
Total funding to be received 2016-17	£96,000	£24,000	£24,000	£24,000	£24,000					
Outcomes	<p>To increase economic wellbeing through benefit maximisation raising £700, 000 in benefits for local older people</p> <p>To support 200 older people to remain in their own homes</p> <p>To empower 300 older people to advocate on their own behalf</p> <p>150 older people better informed of care options within the borough</p> <p>To increase the skills of 18 local people through providing volunteering opportunities with training and support to become low-level advice/form filling volunteers</p>									
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
We will deliver 5 talks to BAME groups, providing information on benefits and services for older people.	5	1	2	3	6	120%	5	1		20%

We will see 150 older people at drop-in sessions in the most deprived parts of the borough.	150	42	34	61	137	91%	150	36		24%
We will provide 700 office appointments and 300 home visit appointments.	1000	329	356	342	1,027	103%	1000	269		108%
We will carry out over 200 benefits checks for older people. We will negotiate 100 successful repair issues.	300	210	176	168	554	184%	400	80		20 %
We will provide information, leaflets and assistance to service users to enable them to deal with issues themselves	Information provide for service users									
Provide 26 online access sessions to older people and support with online form applications	26	7	19	12	38	146%	34	11		32%
Provide 52 self-advocacy and support telephone sessions	52	13	18	23	54	104%	69	21		30%
We will advise 150 older people on options around care services within the borough	150	66	77	63	203	137%	200	52		26%

<p>We will to recruit a further 6 volunteers a year to train as low-level advice workers/form fillers. -Volunteers will be placed within different services to increase the capacity for our advisors and other advisors in the borough to deal with more complex issues.</p>	6	3	2	3	8	133%	8	2		25%

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 except one of the Advice services targets were achieved, with 137 drop-in sessions for older people taking place in the first nine months of the contract and a further 36 in Quarter 1 of 2016/17. The 700 office appointments forecast and 300 home visits were achieved – a total of 1027 were achieved in the first three quarters and a further 269 in Quarter 1 of 2016/17. 38 online access sessions were achieved in the first three quarters and a further 11 in Quarter 1 of 2016/17.

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

The wider outcomes were achieved, with the Advice Service raising £700,000 through benefit maximisations. The organisation's volunteering opportunities were also achieved, increasing the skills of local people.

The organisation has a number of initiatives for older residents and aims to address particular identified needs. One of the initiatives that Age UK participates in is the Winter Angels initiative which aims to identify vulnerable older residents and mobilise support to address identified needs.

A key aspect of the advice work provided by Age UK is their national telephone support line and their home visits services which address the particular needs of the target group.

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?

The one area where targets were not achieved relates to advice drop in sessions for older people. The organisation is looking to improve the co-ordination of its advice work and Community Connections activities. This is necessary because a number of Community Connections referrals have welfare advice needs.

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

As the older population increases, the demand for services offered by Age UK is likely to increase, particularly in relation to vulnerable adults. Age UK Lewisham and Southwark is increasingly focusing its work on this group. A key aspect of their service involves maximising the income of residents through advice on pensions credit eligibility, housing benefit and Attendance Allowance and care costs.

Referrals from statutory agencies, including health professionals, demonstrate this increase in demand.

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.

In common with other advice service delivery in Lewisham, Age UK will be working to redesign current access to advice provision. This better integration of services is aimed at leading to more effective working and a more streamlined service for residents. In addition to this, Age UK is also considering integrating its advice provision with its Community Connections work.

Age UK is further seeking to relocate from its current premises which could result in savings.

What alternative funding streams are you already pursuing?

Age UK Lewisham and Southwark has a well-developed strategy for business development, including the identification of alternative sources of funding. The organisation currently receives grants income from the two boroughs of Lewisham and Southwark.

As part of its work with other organisations, Age UK supports the capacity building of a number of local groups.

With regard to additional funds, the organisation is currently pursuing an application to City Bridge Trust.

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

In order to mitigate against any reduction in funding, Council officers will work with Age UK to identify alternative funding for parts of its provision. The organisation is taking part in the Lewisham Advice Review.

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 UK is exploring better co-ordinating their advice service with the work of Community Connections. They believe this is the advantage of developing the advice and information skills of their Community Connections team and enabling the advice team to better target their service to the needs of individuals referred by community organisations.

The organisation is open to working in partnership and collaborating with other groups in the borough. However, given its relative size and complexity, a merger is unlikely to be an option.

The organisation is currently looking at its premises requirements and this could involve working more closely with other Lewisham-based groups.

Through Community Connections, the organisation has very strong links with key local partners, including VSL, Rushey Green Timebank, LDC and Carers Lewisham.

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?

Age UK has expressed an interest in working with groups supporting older residents in the borough and is willing to share its expertise in working with this demographic.

What support might you need to move these suggestions forward?

Age UK will continue to work closely with LB Lewisham officers in planning its future provision for its advice services, particularly in respect of future neighbourhood-based delivery.

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?

The reduction is likely to result in a reduced number of advice sessions from ten to seven and a proportionate impact on service delivery.

The modelling of any reduction will need to be done as part of the Advice Lewisham partnership as this will be the single delivery vehicle for advice provision in Lewisham via a range of delivery mechanisms including a Free phone line as the main service entry and triage point.

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

The organisation has not as yet fully modelled the potential impact of a 25% reduction. However, its initial analysis would suggest that a 25% reduction would result in a commensurate reduction in services.

Conclusion

Any other comments / areas discussed

N/A

Conclusion and recommendation

It is recommended that the organisation receives a pro rata cut in funding.

The organisation will be working as part of the advice review and will be contributing to the common gateway for clients. The pro rata cut recommendation is conditional on the full involvement of Age UK in the advice review and the organisation's commitment to jointly plan and deliver advice provision across the borough.

Equalities groups disproportionately impacted by recommendations

Ethnicity:		Pregnancy / Maternity:	
Gender:		Marriage & Civil Partnerships:	
Age:	X	Sexual orientation:	
Disability:		Gender reassignment:	
Religion / Belief:			

Commentary and potential mitigations:

The organisation works with older residents and a reduction in services would disproportionately affect this group. The impact of this will be mitigated by the planned advice service changes which will provide better planning for service users and improved referral arrangements between the existing advice providers.