

Main Grants 2017-18 report

Name of organisation	Seniors – Elder Persons Resource Centre
Date of meeting	Wednesday 14 September 2016
Names and positions of attendees	James Dobson - Chair and Temporary Treasurer, Seniors David Warren – Seniors Trustee Lucy Formolli - Development Officer Cultural Development, LBL James Lee – Head of Culture and Community Development, LBL

Group Name:	Total	Q1	Q2	Q3	Q4
Total funding received 2015-16	£34,224	N/A	£11,408	£11,408	£11,408
Total funding to be received 2016-17	£45,632	£11,408	£11,408	£11,408	

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Total funding to be received 2016-17	£45,632	£11,408	£11,408	£11,408						
Outcomes	Support									
	1. Males aged over 60 to experience reduced levels of isolation and loneliness. Participants to confirm that they have benefitted from the 'Men's Shed' project and have increased positive social interaction as a result									
	2. People aged 60 or over increase their fitness levels and reduced need for medical intervention									
	3. People aged over 60 feel reduced levels of loneliness and isolation. Attendees confirmed that they have benefitted from the outings and have increased positive social interaction as a result									
	4. People over 60 to benefit from increased mental stimulation and improved feelings of wellbeing									
	5. Older people become more creative and confident, also increasing their level of sociability									
	6. People over 60 to improve their health and sociability									
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
Taster' programme of practical 2 hour sessions such as woodworking, repairing electrical equipment, games	14 sessions	2 (tasters) ?	12 (4 attendees	12 (4 attendees	26 - 96 participants	185% sessions	240 participants PA	30	N/A	13%

such as pool, darts etc. for older men. Ideas to be tested through open days and monthly events with a view to being rolled into a 'Men's Shed' project in 2016.			per week 48)	per week) 48			(changed to Participants PQ)			
Weekly programme of physical activity sessions (e.g. line dancing, zumba and tai chi) plus wellness sessions of 60 minutes duration delivered to 30 participants per week over 36 weeks	36 Sessions to 1080 participants	12 Sessions / 38 PW	12 sessions / 37 PW	12 Sessions 47 pw	36 + Sessions 1476 Participants	100% Sessions delivered 136% of participants	2000 participants PA	581	N/A	29%
6 theatre events, day trips, tea dances etc. organised during the 9 months (20 participants each).	6	2	2	0	4	66%	8 Outings PA 20 participants on each	4	N/A	50%
Weekly Whist Drive, French conversation, bereavement counselling etc. plus quarterly quizzes, film shows delivered to 25 people per week over 36 weeks	36 Sessions 900 participants	12 Sessions 31 PW	12 Sessions 48 PW	12 Sessions 36 PW	36 + sessions 1387 participants	100% Sessions Delivered 154% participants	1800 Participants PA	701	N/A	40% - on target
26 1-2-1 IT sessions led by Digital Champions with one-off Pop up Techy tea in second quarter	28	10	10	10	30 Sessions	107%	88 participants	40	N/A	45.00%
Weekly Grow, Cook and Eat project with 5 Seniors volunteers and 5 volunteers from the Youth Offending Service over 36 weeks	36	12	12	12	36 sessions (20 regulars PW	100% Delivered	288 - 72 participants PQ	60 - official project ended but 5 garden vols ongoing PW	N/A	20%

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?

1 out of 6 target outputs was not met by Seniors in 2015-16. This is the following output **6 theatre events, day trips, tea dances etc. organised during the 9 months (20 participants each).**

However Seniors has subsequently made this up, by arranging an additional 2 trips in Q1 of 2016-17. Seniors has met or exceed all other target outputs

By not achieving the output above suggests Seniors have not delivered on the outcome of 3. **'People aged over 60 feel reduced levels of loneliness and isolation. Attendees confirmed that they have benefitted from the outings and have increased positive social interaction as a result'** as trips are fundamental to this outcome being achieved – as stated this has been made up in Q1.

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

Although the agreed outputs and outcomes above are as indicated, there are wider plans in the application form that have not been fully achieved.

For example there is no evidence to suggest that Seniors have delivered on the below: *'We have agreed that we will work with transport providers (e.g. Access Lewisham (Volunteer Services Lewisham) and Lewisham Community Transport Services) to ensure that those housebound older people are not prevented from accessing the programme of activities and services available at Seniors'.*

In addition the application stated: *In 2013 Seniors entered into a partnership with Eco Communities in order to benefit from that organisation's expertise in bid writing, fundraising, governance support and setting up financial systems. This partnership was guided by a partnership agreement which clearly set out the obligations on both parties.*

This agreement came to an end without significant changes having been achieved at Seniors. Therefore the need to strengthen the organisation's financial management and governance remains unmet. However Seniors still contract an hourly paid fundraiser and monitoring worker to work on bids and main grant monitoring.

Furthermore the application stated: *Seniors is proposing to recruit a Centre Administrator/Operations Manager who will be responsible for promoting new activities across the Borough.* Although they originally expressed the need for and recruited a centre manager as the primary use of the Main Grant Funding, that relationship was terminated and the grant now funds the administrator. However some of the grant is used to subsidise the other internal management of the centre itself.

This is not in the spirit of the original agreement. Seniors understand that this grant is not to be used for basic core running of the organisation and will adapt accordingly, continuing to fund, train and develop the administrator or provide a coordinator through the grant payment and seek the employment of a centre manager/coordinator.

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 factors for the following output not achieved:

6 theatre events, day trips, tea dances etc. organised during the 9 months (20 participants each).

Seniors have stated that although the organisation did not deliver on this output, they are in a partnership with The Ackroyd Centre and their members often go on Ackroyd trips – which Seniors suggested as they have a joint membership scheme, these trips should be counted.

It was questioned whether this was effectively reporting on an Ackroyd output who are also main grant funded. Therefore it is felt that this output has not been achieved with no mitigating factors for 2016-17.

What plans are in place for improving performance?

There are no performance issues with Seniors service delivery, they are meeting most and exceeding many targets, and adding new sessions for their service users all the time - most recently the successful Disco Dancing sessions. However with regard the organisations sustainability, there are no detailed plans in place to address a number of issues, which are fundamentally weakening the organisations future sustainability and ultimate viability.

The main issues for the organisation is that it struggles to remain financially solvent.

Seniors no longer employ a dedicated and experienced Centre Manager and this is an issue as the current administrator is over stretched and possibly in need of more training and support. This post does not include any fundraising or revenue generating role. Seniors sessions are good and well attended, however the burden of the building and the associated costs are causing Seniors major issues at an operational and financial level – the majority of funds attracted are used just to keep the building going and functional.

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

The main actions the organisation has been working to address with the Lead Officer relate to raising revenue through other funding sources. Using an 'as needed' fundraiser means that applications are going in, but these are not the kind of substantial grants really needed to take Seniors forward and get the organisation to be sustainable. This is due to fear over being able to afford to pay the fundraiser for the additional time needed to deliver a larger application.

The organisation has been tasked with dealing with their online presence as a priority – this will directly help deliver on increased lets for the building. Currently they are not online in any meaningful way to attract people to hire the centre for any activities. This is still not going forward. Lead officer feels that this is due to lack of experience in these issues within the board and volunteer base.

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

Community Connections has identified unmet need among individuals with dementia within the area (Cluster 4) as many of the organisations that provide services for this group are full and have waiting lists.

- Seniors have addressed this by becoming part of the Purple Alliance and the Dementia Action Alliance

Community Connections has also highlighted the need for a range of activities that last 2-3 hours rather than shorter sessions as older people found it more helpful to arrange transport for a longer length of time.

- Seniors have addressed this and increase the number of activities in morning and afternoon sessions to allow for longer sessions.

There was also a general need identified for affordable and accessible transport to enable individuals to participate in activities that are available.

- Accessible transport is an issue for all older peoples organisations there is no evidence to suggest that additional transport is being accessed to enable housebound members to attend sessions

Seniors identified need

Feedback delivered to Seniors through consultations at open days and through its membership has highlighted a large group of older males in the Borough which do not currently actively participate in activities aimed at this age group. In addition, Seniors itself has a relatively small number of male members and an even smaller number of male members who actively participate. As a result of the consultation Seniors have learnt that there is considerable support for more activities targeted at this group.

- Seniors have addressed this by delivering on their output of offering practical men's sessions including woodwork etc. through their Men's project. The volunteers that have emerged from the sown and grow project are now working voluntarily in the garden. These volunteers are all male

Seniors have increased membership by c100 members in the last 2 years and now have membership figures of nearly 250, up from 149 stated in the original application

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.

Seniors has recently let out office space to an organisation called Care Outlook. This organisation pay a monthly rent which has helped ease financial burden slightly, however Care Outlook are paying a reduced rate for at least a year to off-set a loan made to Seniors to carry out works required on the building to be able to proceed with the rental.

There have been extensive discussions with Seniors around developing the rental business side of their property. There is huge potential to rent this space to businesses, or individuals for large scale events or smaller gatherings, as the space is quite flexible. They are currently in negotiations with one business to put on banquets at the centre, but this is not moving forward at this time. There is lack of real knowledge about how the organisation could really make this work - they could get help and advice if they wanted.

There are subsidised activities going on for older people every day between 9.30 and 4pm. there is huge capacity to rent their space to paying organisations in the evenings such as scouts groups, NCT groups and so on.

The trustees appear to be reluctant to embrace the idea of opening the centre in the evening and weekends as they are concerned with being good neighbours. Trustees are needed to open and lock up the building to fully realise rental potential. They have no online presence which greatly hinders rental potential as people aren't aware it is available for rent now.

Seniors feel they need £100,000 to really make the venue a viable rental space, this is disputed, however there could be potential to apply for a Big Lottery grant under the 'Reaching Communities: Buildings' strand. However Seniors feel they are not in a position to have the capacity to make a bid that substantial, nor to manage works that big.

Seniors have been asked about their thoughts on selling the building - which they feel is a real burden to the organisations delivery for older people. Firstly it is unclear if Seniors are allowed to sell the building, secondly they would not consider selling the building as the space is fundamental to what they deliver and to the wellbeing of older people with regard the importance of space to mental wellbeing.

There is potential to bring the Centre in under the contract for premises management, being negotiated by the council at the moment. Seniors are open to that idea

What alternative funding streams are you already pursuing?

Little evidence of attracting actual grant income coming in, this has been raised a number of times with the Seniors. Not having a coordinator or manager is an issue. They pay a contractor on an hourly basis to complete funding bids on their behalf and to do monitoring. This is however restricted by the amount of work Seniors are able to pay for.

Currently they have applications in to Postcode Community Trust to fund the employment of a volunteer coordinator who would develop a programme of lunchtime health and wellbeing activities as well as recruit and manage volunteers who could sustain them. Seniors accesses small pots of funding from local assemblies and Positive Ageing Council.

The Centre Cafe was meant to generate funds for the organisation - however this is actually running at a loss. Lack of marketing and issues with the organisation have not helped this. Seniors are considering rebranding. There is scope to get income from the café by attracting a new audience, young parents for example, but the organisation feel that their members do not like sharing the space with children.

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

As above – although not a funding stream, Seniors are keen to discuss involvement in the new Lewisham Council premises management contract and would need the council to facilitate this.

They would need support from Lead officer to access the Big Lottery Community Buildings fund.

Seniors feel they are not getting the required support for their digital sessions from 'Go On Lewisham' and that they need more help – the Lead officer will help facilitate this, by improving their digital offer they may be able to access more funding streams around digital inclusion.

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?

Seniors have not considered a merger with any other organisation.

Several options were put to the group including potential to work with Lewisham Pensioner's Forum to rent their office space and consider a quid pro quo arrangement for some building centre management. Seniors stated that they have in the past worked in partnership with the Forum but felt that the Forum consider themselves to be such a different organisation from other older peoples groups that a full merger would not benefit either organisations.

There was a further discussion around working with groups who have successfully rented their space as more of an information sharing partnership. Seniors were open to this idea and hoped the council would facilitate a meeting.

They have assets to share with regard their space, but felt they could not accommodate the delivery of another group's sessions, as they already had a full programme of activities during the day.

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?

It could be considered that Seniors are sharing their resources with a different type of service by renting their upstairs space to Care Outlook.

Seniors have not made any other approaches to other organisations about sharing resources or merging.

Seniors do not consider that working with an external organisation in the past to help with governance or fundraising served them well. Therefore there is reluctant to do this again.

What support might you need to move these suggestions forward?

Seniors are keen to attend an open information and asset sharing meeting to be run and organisation by the council.

There is a hope that this meeting will be fruitful for the organisation with regard partnerships to deliver a more robust rental plan and marketing plan. The organisation is also keen to find out more about potential governance support.

Seniors would need council support to help the centre become part of the premises management contract, although further conversations about what the commitment and outcomes of this need to be had with senior premises officers in the council.

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?

Seniors suggested that the only option would be to cut at least a day of service provision and have the centre shut for a day. This would impact on the users in many ways – firstly thought the social drop in aspect of seniors and the delivery of some of the activity sessions as there would be no scope to deliver these on a different day.

It was suggested that that day could be used to generate income from other lettings and increase the offer on the other days for older people.

Seniors feel that to lose 25% of the grant would immediately place the organisation into a minus cash flow situation. Seniors appear to have no reserves to be able to provide a buffer or wind down costs should these be needed. This lack of reserves is a major issue for LBL as the following was stated in the original application:

Current Reserves Status

Seniors aims to keep the equivalent of three months outgoings in reserve to cover such eventualities unforeseen essential repairs and maintenance, this amounts to £25,000.

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

There seems to be no modelling for a 25% cut. Although Seniors were encouraged strongly to do this prior to this process, it seems that the organisation and board have not done any detailed research into how they would be able to continue functioning with a cut of 25%

As mentioned above, Seniors stated that as a minimum they would need to reduce at least a day of service delivery for older people.

Seniors were advised to change their mortgage terms immediately – currently paying 7% on their mortgage. LBL have asked to review Seniors Annual Accounts and that these be sent through as a matter of priority

Conclusion

Any other comments / areas discussed

Other than a broader discussion around general finance, financial viability, the charities annual accounts and their repayment rate of the re-mortgage. No other areas were discussed.

Conclusion and recommendation

Seniors provide a daily programme of activities for older people in Lewisham 5 days per week between 9.30am and 4pm.

Seniors have met or exceed all but one target of delivering trips in 2016-17, however they appear to have made up this shortfall in 2016-17 by delivering 2 additional trips in Q1

Seniors own the building, but it is recognised a financial drain for the organisation. Although there is significant opportunity to develop the space for the letting / rental market to groups other than for older people, in the evenings and at weekends. If Seniors Could attract a large capital grant to help renovate the building this could be a fantastic opportunity but capacity to deliver this makes it unlikely

The organisation is under financial strain, mostly caused by the burden of repairs and unforeseen costs on the building, but will not consider selling this building.

The group are unlikely to consider mergers but are happy to discuss asset sharing and potential partnerships with other like-minded groups delivering for older people. However the right merger, alleviating them of the building and rental issues, would be discussed.

Seniors are interested in being involved in the Council's Premises Management contract

The Organisation has not modelled for a 25% cut, however Seniors suggest that the best case outcome of this is to close the centre one day a week and deliver less sessions for older people.

Seniors must look into a renegotiation of the mortgage rate on their building as a matter of urgency

Seniors are achieving or exceeding 9 of 10 outputs and outcomes, and have made up the shortfall in Q1.

Officers are extremely concerned about Seniors on-going viability. It is recommended that Seniors Elder Peoples Resource Centre receive a pro-rata cut based on their performance against outputs and outcomes but that this is also contingent on the organisation engaging in serious discussions regarding their financial future.

Equalities groups disproportionately impacted by recommendations

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

Commentary and potential mitigations:

Seniors provide services primarily for older people and their users are overwhelmingly women.

Equalities groups disproportionately impacted by recommendations

The fact that the potential 25% cut has not been modelled makes assessing the impact on these groups difficult but, given the organisation's financial situation, there is likely to be a significant impact on service delivery.

Officers will continue to work with Seniors to address their structural issues to minimise the impact on their service users.