

ITEM No ...13.....

REPORT TO: POLICY AND RESOURCES COMMITTEE – 24 APRIL 2017
REPORT ON: HOSPITAL FUND AND JOHNSTON BEQUEST
REPORT BY: EXECUTIVE DIRECTOR OF CORPORATE SERVICES
REPORT NO: 114-2017

1.0 PURPOSE OF REPORT

This Report sets out information relating to the Older People's Advice Service which is currently delivered by the Citizens Advice Bureau.

2.0 RECOMMENDATIONS

It is recommended that:-

- The post within the Older People Advice Service (OPAS) should continue to be carried out by Citizens Advice Bureau (CAB) Dundee and be funded via the Hospital Fund and Johnston Bequest for a three year period with short peer reviews being completed yearly.
- The Lead Officer responsible for monitoring the outcomes of the Older Peoples Advice Service Project is the Senior Manager – Council Advice Services.
- The individual lifetime grant payments to pensioners continue at the current level of £80 per year.

3.0 FINANCIAL IMPLICATIONS

The cost of this project over the three year period will be £75,000, and the lifetime grant payments estimated to be £27,000 which will be from the surplus income from the Hospital Fund.

4.0 BACKGROUND

The Hospital Fund and Johnston Bequest were vested in and administered by the Lord Provost, Magistrates and Councillors of Dundee under a special Act of Parliament entitled "The Dundee Churches and Hospital Act 1864" for the benefit of the poor of the town. The funds are currently vested and administered by the City Council under the Local Government etc (Scotland) Act 1994.

The income from the capital assets held by these Funds has been utilised principally for distribution to pensioners in financial need. The Fund's income is derived from a combination of interest on temporary loans and rental income on property owned in Reform Street. The Fund's capital account currently stands at £706,135 and annual rental income was £44,198 as at 31st March 2016.

Expenditure for the year to 31st March 2016 was £39,325 comprising Rates and Repairs and Maintenance (£5,045), payment of pensions to beneficiaries (£9,280) and Older People Advice Service (£25,000).

At its meeting on 14th January 2013 approval was given to report no 452-2012 when it was agreed to allocate £25,000 from the above trust funds to pilot a targeted welfare benefit advice service for older people in the city. By creating a welfare benefits advice post it was anticipated that £200,000 to £250,000 additional income would be injected into the pensioner community per annum.

The OPAS delivered via CAB Dundee reported that from the period March 2015 to December 2016:-

- 1176 new clients had engaged with the project

- 2725 issues had been identified
- Income had been maximised by £373,705

Given the success of the project it is proposed that the OPAS is continued for a further three financial year from 1st April 2017 to 31st March 2020 at a cost of £75,000. Lifetime grant payments to individual pensioners will continue at the current level of £80 per annum. The estimated cost in 2016/17 is circa £27,000.

In March 2017 a peer review was undertaken of Dundee Citizens Advice Bureau's provision of advice and information through the Older People's Advisory Service. The current work being undertaken was deemed satisfactory and of sufficient quality in terms of the original specification of the service.

Recommendations have been discussed with the CAB to further enhance the service which include:-

- Co-ordinating the service more closely with other agencies providing support to over 60s within Dundee,
- Improving the links and knowledge of the Councils non-residential and residential charging regimes.

5 POLICY IMPLICATIONS

This report has been screened for any policy implications in respect of Sustainability, Strategic Environmental Assessment, Anti-Poverty, Equality and Impact Assessment and Risk Management. There are no issues in this regard to report on.

6 CONSULTATIONS

The Council Management team were consulted in the preparation of this report.

7 BACKGROUND PAPERS

None.