

**MEETING: 30/10/2013**

**Ref: 11921**

**ASSESSMENT CATEGORY - Positive Transitions to Independent Living**

**Choice in Hackney**

**Adv: Karisia Gichuke**

**Base: Hackney**

**Amount requested: £71,835**

**Benefit: Hackney**

**Amount recommended: £71,800**

**Purpose of grant request:** Disabled-led information, support planning and brokerage service to help people accessing personal budgets and direct payments for the first time.

**Background**

CHOICE in HACKNEY (CHOICE) was set up 22 years ago. It is a voluntary organisation providing advocacy, volunteering, training and employment and other independent living services to disabled people in London. CHOICE supports disabled people from all communities to obtain the services they need to live independently. The organisation is run by disabled people and its mission is to empower disabled people to have independence, control, choice, flexibility and a voice over how they run their lives.

**Funding History**

CHOICE was funded in 2001 with a three year grant of £95,000 to provide advocacy support to Hackney residents over 16 with physical, sensory, mental health and learning disabilities. Monitoring reports received were satisfactory.

**Current Application**

In most cases today, anyone who wants to access social care services will be assessed by their local authority, who will decide what support they should receive. Personalisation enables service users to choose what services they receive, entailing that services are tailored to the needs of each individual rather than delivered in a one-size-fits-all fashion. The aim is to give people real choice and control over the support they receive, as opposed to others deciding for them. People can choose to be involved in planning and organising their own support, or they can choose for others to do it for them. London Borough of Hackney lags behind in meeting government targets on personalisation (70%+), with the lowest proportion of people in receipt of direct payments in London (31% at Sept 2011).

The proposal by CHOICE is for a two year volunteer project which aims to support first time users of personal budgets in Hackney. 15-20 volunteers a year will be trained first in advocacy which will enable them to provide

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information and signpost on personalisation. Those who are able to commit to at least six months of volunteer activity afterwards will be offered nationally recognised accredited training in brokerage. The volunteers will deliver one to one sessions on personalisation and offer an independent supportive brokerage service to Hackney residents.

A key aim of the project will be recruiting a high proportion of disabled people onto the training programme as volunteers so that they can provide peer support and act as role models. This is an approach CHOICE has relied on through its 21-year experience, with good results.

### **Financial Observations**

Audited accounts for the year ended 31 March 2012 show a deficit of £7,999 (5.9% of turnover), comprising £6,176 on unrestricted funds and £1,823 on restricted funds. The charity's reserves policy is to hold between three and nine months' expenditure, which equates to approximately £44,622 – £133,866 based on current year budgeted expenditure. At 31 March 2012 free unrestricted reserves stood at £51,204, equating to 3.4 months' worth of current year budgeted expenditure.

Draft accounts for the year ended 31 March 2013 show a surplus of £11,437 (8% of turnover) comprising a surplus on unrestricted funds of £15,737 partially offset by a restricted fund deficit of £4,300. The budget for the current year 2013/14 shows total income of £170,765, all of which is confirmed. After projected expenditure of £178,490, a deficit of £7,725 (4.5% of turnover) is anticipated, comprising a deficit of £33,961 on unrestricted funds and a surplus of £26,236 on restricted funds. This unrestricted fund deficit would reduce the free reserves position to £32,980, equivalent to 2.2 months' worth of current year expenditure, by 31 March 2014.

### **Officer's Appraisal**

This project will develop CHOICE's considerable experience of providing advocacy training through volunteers, to deliver the first independent brokerage service in Hackney. It will enable disabled people in the borough to live more independently, by identifying the changes they wish to make in their lives and the support and community that they require.

### **Recommendation**

**£71,800 over two years (£37,100; £34,700) towards the salary and costs of training and delivery of a volunteer and disabled-led information, support planning and brokerage service to help people accessing personal budgets and direct payments for the first time.**





# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11921

Date Received:

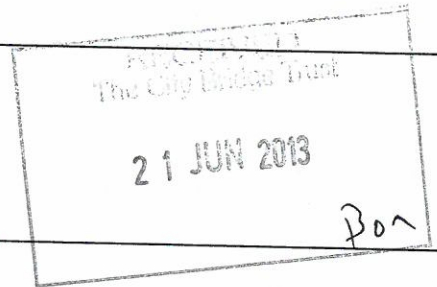
21 June 13

Programme  
Area:

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### 1. About your organisation

Name of organisation applying for grant: <b>CHOICE in Hackney</b>	
If the organisation is part of a larger organisation, what is its name? <b>n/a</b>	
Address for correspondence <b>Defoe Block Ground Floor 50 Hoxton Street London</b>	
Postcode: <b>N1 6LP</b> Is this your home address? <b>No</b>	
Contact person: <b>Ms Caroline Nelson</b>	Position: <b>Director</b>
Phone: <b>020 7613 8130</b>	Fax: <b>020 7739 8599</b>
E-mail: <b>admin@choiceinhackney.org</b>	
Website: <b>www.choiceinhackney.org</b>	
Legal status of organisation: <b>registered charity</b>	
If registered, please give charity number: <b>1077287</b>	
Year and month organisation established: <b>January 1992</b>	



### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Positive transitions to independent living</b>
Purpose for which funds are requested: (25 words maximum) <b>Disabled-led information, support planning and brokerage service to help people accessing personal budgets and direct payments for the first time</b>
How much funding is requested? <b>Year 1: £37,119 Year 2: £34,716 Year 3: £0</b> <b>Total: £71,835</b>

### 3. Aims of your organisation

CHOICE IN HACKNEY is an organisation run by disabled people, for disabled people, committed to empowering disabled people and working to the social model of disability. Most Trustees are disabled people. We are the only disability organisation in Hackney affiliated to Disability Rights UK. Our objective is to support disabled people from all communities in Hackney and surrounding Boroughs to obtain the services they need to live independently, with dignity, and to make choices about their lifestyles.

Following a feasibility study into a Centre for Independent Living, commissioned by Hackney's Disability Special Interest Group in 2011, the Trustees agreed to develop into a Centre for Independent Living. A bid supported by London Borough of Hackney (LBH) to the Office for Disability Issues for some management and business capacity to achieve this was successful in January 2013.

### 4. Main activities of your organisation

- **Advocacy Project:**

Is the support and encouragement given by a professional advocate to a disabled service user (SU), to enable the SU to obtain services needed to live an independent, dignified lifestyle in the community and make choices. Advocates assist SUs in obtaining services such as accessible housing, care packages, accessing health services etc.

- **Advocacy Training & Employment Project:**

This is 12-week classroom based training in advocacy principals and job search skills. It is followed by a 6-8 week work placement by trainees, which allows for practical experience, confidence building and motivation. Both are aimed at aiding better employment prospects. The project also educates and advises employers around best practice with regards to the employment of disabled people.

- **Volunteering Project:**

This provides one-to-one support to disabled people in the community from volunteers. Activities carried out include befriending and gardening. Also, disabled and non-disabled volunteers gain office skills whilst supporting CHOICE in its core functions.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	5	7	30

### 6. How do you support your volunteers?

The Volunteer Coordinator provides on-going support to volunteers delivering services. Office-based volunteers have regular supervision with their line manager. Volunteers have a 2day induction programme. 25% of our volunteers are disabled people.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	Rent free arrangement



## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	161
Activities for generating funds	0
Investment income	23
Income from charitable activities	134,449
Other sources	0
<b>Total Income</b>	<b>134,633</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	115,647
Governance costs	14,987
Cost of generating funds	11,998
Other	0
<b>Total Expenditure</b>	<b>142,632</b>
<b>(Deficit)/surplus for the year:</b>	<b>(7,999)</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	0
Investments	0
Net current assets	55,504
Long-term liabilities	0
<b>*Total A</b>	<b>55,504</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	0
Restricted funds	4,300
Unrestricted funds	51,204
<b>*Total B</b>	<b>55,504</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
62%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Statutory grant income for community advocacy work has been replaced by a three year contract which started in November 2012. We are now a sub contractor to City & Hackney Mind which holds and manages the contract with Hackney Council.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Jun	/	2001	Ref: 1104	Grant received: £95,000	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i) City of London	0	0	0
(ii) LB Hackney	39,507	39,507	24,262.14
(iii) London Councils	0	0	0
(iv) City&Hackney Community Health	43,059	44,468	44,468
(v) Department of Health	34,992	34,944	0
(vi) Homes for Islington	2,100	2,100	1,400

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
Trust for London	20,000	0
State Street Foundation	0	14,500
Access to Volunteering	5,000	0
Henry Smith Charity	0	75,000
Garfield Weston Foundation	0	5,000
Lloyds TSB Foundation	0	15,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

We encourage volunteers and staff to take public transport but acknowledge that for some disabled workers and volunteers with limited mobility or who are wheelchair users, this may not be possible.

Our aim is to become a paperless office. More tasks are now being carried out and stored electronically.

CHOICE is currently working to achieve Practical Quality Assurance System for Small Organisations (PQASSO) accreditation in 2013, and would welcome guidance on how it can include in this an environmental policy with the aim of reducing carbon emissions.



## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Hackney has a low level - 31.1% as at September 2011 - of take up of personal budgets and direct payments compared to London as a whole. Research conducted by CHOICE in Hackney and Scope in May 2012 confirmed the interest of disabled people in self-directed support, but according to telephone research conducted afterwards by CHOICE, 90% said they did not feel confident about accessing a direct payment. Barriers include lack of awareness, lack of confidence, poor literacy and English as a second language.

About 1200 children are assessed as Special Educational Needs (SEN) in Hackney, and traditionally, about one in four received their education out of Borough, including Deaf young people, young people with autism, physical disabilities and visual impairments. Many of these young people will need to 'reconnect' with Hackney when they become eligible for personal budgets and move back home.

We intend to use a high proportion of disabled volunteers on the project, as national evidence is that peer support increases the confidence of people to have personal plans that meet their needs, and confidence to manage direct payments to maintain their independence.

Our project aims to achieve the following for service users:

- More people will take up direct payments for the first time as a result of using our service
- More people with personal budgets will be more confident in using assessment and brokerage to live independently
- Our service is viewed as high quality and empowering by service users
- People are aware of a wider range of services that they can access as part of their support planning

We are a disabled-led organisation with 21 years' experience of providing services for disabled people in Hackney. We currently offer community advocacy, befriending and volunteer services, and training for disabled people in Hackney.

The project will support the Trust's Positive transitions: to support independence and improvement of disabled people in transition. Specifically: Services for people with a newly acquired disability to help them maintain choice and control in their lives; Work assisting young disabled people with the transition to adulthood, such as managing the move from residential care to independent living or supporting disabled school leavers into employment, college or a community resource; Support for disabled people in managing independent living and 'personal budgets'.

As a disabled-led user organisation we involve disabled people in the management and running of all services. An important role of the Personalisation Coordinator will be to collect and monitor user engagement and outcomes. The project will also be evaluated by service users at its end. A high proportion of the volunteers who will be delivering this service will be disabled people, and they will be supported by high quality training (information) or accredited training (brokerage including support planning) to fulfil their roles. We will also reimburse travel costs. We see this project as a prompt to take steps to reduce our carbon footprint, and will ensure that we develop an environmental policy.

The job description for the new Personalisation Coordinator post is attached. Also a fuller description of the project. \*

\* on file



**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

As part of the project start up we will review the appropriateness of the outcomes star and other models to capture change for service users before and after their contact with us.

Data on service users will be captured on the case work system, but we will also ask for on going feedback, including a question on how the service they have received has made a difference.

We will undertake an end of project evaluation, which will be undertaken by the Coordinator, supported by an external consultant. This will involve a review and analysis of the statistical information, data on the system, and a summary of the ongoing evaluation, as well as two focus group workshops, and some one to one interviews. We will also ask for feedback from referrers and other stakeholders.

**17. Beneficiaries**

How many people will benefit from the grant per year? **50 disabled people year 1; 70 year 2 (120 in total)**

In which local authority is your organisation based?  
**London Borough of Hackney**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)

**Beneficiaries: London Borough of Hackney 100%. Disabled volunteers: 80% Hackney, 20% City of London, Tower Hamlets, Islington**

At what address will the activity be located? **Defoe Block, Ground Floor, 50 Hoxton Street, London N1 6LP (LB Hackney)**

What age group will benefit? **16-64**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?  
**100%**



## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Recruitment costs	1,800	0	0	1,800
Office equipment, volunteers/coordinator	1,500	0	0	1,500
Programme publicity	1,800	900	0	2,700
Coordinator salary, NI and pension	9,869	10,166	0	20,035
Support costs, eg accounts, tel, @ £600/m	7,200	7,200	0	14,400
Project Management & supervision	4,500	4,500	0	9,000
Volunteer training, incl accreditation	7,800	6,800	0	14,600
Volunteer costs: travel, subs, translate	1,600	2,300	0	3,900
Volunteer/sessional staff admin	700	700	0	1,400
Staff travel	350	350	0	700
Evaluation costs	0	1,800	0	1,800
<b>TOTAL</b>	<b>37,119</b>	<b>34,716</b>	<b>0</b>	<b>71,835</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

What other funders are currently considering the proposal?

None.

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
recruitment costs	1,800	0	0	1,800
office equipment, volunteers/coordinator	1,500	0	0	1,500
programme publicity	1,800	900	0	2,700
Coordinator salary, NI and pension	9,869	10,166	0	20,035
Support costs, eg accounts, tel, @ £600/m	7,200	7,200	0	14,400
Project management & supervision	4,500	4,500	0	9,000
Volunteer training	7,800	6,800	0	14,600
Volunteer costs: travel, subs, translate	1,600	2,300	0	3,900
Volunteer, sessional staff admin	700	700	0	1,400
Staff travel	350	350	0	700
Evaluation	0	1,800	0	1,800
<b>TOTAL</b>	<b>37,119</b>	<b>34,716</b>		<b>71,835</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **from November 2013**

Is the activity to continue beyond the period for which funding is requested?  
If so, how will it be resourced? **Yes. An outcome of the project is to develop a business model for peer-supported planning and brokerage services, which will be paid for by the disabled user directly, or indirectly, through LB Hackney funding for personalisation and we have scheduled in an evaluation to aid us in this process.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **No**

### Declaration on behalf of applicant organisation

I, **Mary Julian** (your name)

am an authorised representative of

**CHOICE IN HACKNEY** (your organisation)

within which I am **Chair** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date

18.6.13.

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight



21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

**Referee**

**Name:** Jane Welch  
Bi-Lingual Health Advocacy Manager (Community & Hospital Services)  
Division for Children's Services, Diagnostics & Outpatients

**Organisation:** Homerton University Hospital NHS Foundation Trust

**Address:** Room 208, 2nd Floor Defoe Building, 50 Hoxton Street London N1 6LP

**Tel:** Community Service 020 7683 4029 or  
Hospital Service 020 8510 7709

**Email:** Jane.Welch@homerton.nhs.uk