

# The City Bridge Trust

## Investing In Londoners: Application for a grant



### About your organisation

Name of your organisation: <b>Southwark Citizens Advice Bureaux Services</b>	
If your organisation is part of a larger organisation, what is its name? <b>Citizens Advice</b>	
In which London Borough is your organisation based? <b>Southwark</b>	
Contact person: <b>Ms Sally Causer</b>	Position: <b>Development Manager</b>
Website: <a href="http://www.southwarkcab.org.uk">http://www.southwarkcab.org.uk</a>	
Legal status of organisation: <b>Registered Charity</b>	Charity, Charitable Incorporated Company or company number: <b>1070263</b>
When was your organisation established? <b>04/09/1939</b>	

### Grant Request

Under which of City Bridge Trust's programmes are you applying? <b>Reducing Poverty</b>
Which of the programme outcome(s) does your application aim to achieve? <b>More Londoners with improved economic circumstances</b> <b>Fewer Londoners experiencing food poverty</b>
Please describe the purpose of your funding request in one sentence. <b>Southwark CABx Welfare Rights Service ; A casework service, supporting people with welfare benefit applications, reviews and appeals to tribunals.</b>
When will the funding be required? <b>01/09/2014</b>
How much funding are you requesting? Year 1: <b>£52,729</b> Year 2: <b>£53,224</b> Year 3: <b>£54,602</b>  <b>Total: £160,555</b>

**Aims of your organisation:**

Southwark CABx Service provides advice services to people in Southwark and in other London Boroughs.

Our vision is of a society where everyone can express and realise their rights, where responsibilities are understood and acted on by both individuals and organisations, where decisions are taken with the needs of the most vulnerable in our society in mind, and where services are accessible and responsive to those who need them.

We recognise that we need to identify concrete steps to achieve our vision, so are working towards the mission statement by:

- Delivering services responsive to community need
- Empowering citizens to understand and exercise their rights & responsibilities
- Preventing problems through education and training
- Influencing social policy to achieve positive change

**Main activities of your organisation:**

The Service provides advice and information services and undertakes social policy work from our main offices in Bermondsey and Peckham and at various outreach locations in Southwark and neighbouring boroughs. We assist over 12,000 people a year  
We offer telephone and email advice and a webcam service for clients with hearing problems.

We provide specialist advice in areas of debt, immigration, leasehold issues, and welfare benefits advice for people affected by cancer.

We have a large financial inclusion project Money Savvy Southwark which aims to support social housing tenants with money management and digital inclusion.

We are the lead agency for Southwark Legal Advice Network, a partnership of the main independent advice agencies in the Borough which aims to increase access to advice and information.

We also lead the Forum for Equalities and Human Rights in Southwark

**Number of staff**

Full-time:	Part-time:	Management committee members:	Active volunteers:
<b>16</b>	<b>15</b>	<b>9</b>	<b>80</b>

**Property occupied by your organisation**

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
<b>Leased</b>	<b>3 years</b>

## Summary of grant request

Over the past year against a background of welfare benefit advice being removed from the scope of Legal Aid, we have seen a 20% increase in demand for welfare benefits advice.

Some of the main issues facing local residents include:

The reduction in housing benefit for people under-occupying social housing-- around 5,000 households have been affected so far in Southwark. To date we have seen over 1,000 clients affected, many of whom have long term disabilities and are not in a position either to move or to improve their situation by working.

Employment Support Allowance reviews and appeals have increased massively, and the recent introduction of a mandatory reconsideration period is leaving people with no money for long periods.

Peckham Job Centre has the highest number of job seeker sanctions in South London with many people who have been placed in the ESA Work related activity group being subject to these.

We work very closely with the Southwark Food bank to try and resolve the benefit issues of the people who are using their service. The Food bank saw an increase of 400% in people contacting them over the last year.

There is a lack of capacity locally to meet the need for good quality casework with the ability to assist with benefit reviews and appeals.

The funding we are requesting would enable us to employ a full time welfare benefit caseworker. We will further develop referral mechanisms with agencies such as the Southwark Food bank. The caseworker will train and support a team of 4 volunteers to increase the capacity of the project and to assist in making it sustainable longer term. The outcomes we will achieve are

- more Londoners with improved economic circumstances
- fewer Londoners experiencing food poverty
- more people accessing debt and legal services

Southwark CABx holds the Advice Quality Standard and Specialist Quality Mark, and has been established in the Borough since 1939. Peckham CAB is the busiest in London. We lead the partnership of independent advice providers in the Borough- Southwark Legal Advice Network.

Service-users are involved in all aspects of the management and running of the service. Our paid staff and volunteers reflect the diverse community we serve, and our Trustees are mainly local residents.

We seek feedback from clients on an ongoing basis and are currently running focus groups for residents whose first language isn't English to help us evaluate and plan our services.

We have a programme of community engagement, providing training for people active in their communities to ensure they can effectively signpost people they come into contact with to the right support. Increasingly we are encouraging clients to participate in campaigns by telling their stories and using social media

We have a strong commitment to equalities and have funding from Southwark Council to act as a critical friend in this area, contributing to consultations and policy changes.

We have a team of 80 volunteers supporting the organisation in a variety of roles. We have effective volunteer policies and a volunteer strategy.

We are taking steps to reduce our carbon foot print

More information is included in our detailed proposal- attached

If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached?

No

Do you have a Vulnerable Adults policy? No

What Quality Marks does your organisation currently hold?

### Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

**One to one welfare benefits advice sessions, for unemployed and disabled local residents including drafting reviews and appeals, and representation at tribunals. We envisage assisting up to 600 people over the course of the 3 year project**

**Develop referral protocols with partner agencies such as Southwark Food Bank, Southwark Disability Forum, and BAMER community groups to enable them to access effective support for their service users**

**Identify social policy issues affecting local unemployed or disabled residents and share this information with the DWP and decision makers contributing to Citizens Advice national social policy campaigns, and improving practices on a local level.**

**Provide training on welfare benefit issues for a team of volunteers who will support the project. This will include ongoing support and quality assurance measures**

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

**Unemployed people and people with disabilities will be assisted to access their welfare benefit entitlements leading to a reduction in poverty**

**Local agencies are better able to effectively refer their service users/tenants for high quality welfare benefits advice**

**Local agencies and decision makers better understand the issues facing clients leading to improvement in policy and practice**

**By training volunteers to provide welfare benefits casework local capacity is increased and local residents are better able to access high quality advice**

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

**The project will assist in monitoring demand for welfare benefits advice and the impact of changes in legislation. We will use the evaluation of the project to seek funding from grant giving charities and the statutory sector, particularly focusing on health commissioners. We will also train a team of volunteers whose work will continue.**

## Who will benefit?

### About your beneficiaries

How many people will benefit directly from the grant per year?

**200**

In which Greater London borough(s) or areas of London will your beneficiaries live?

**Southwark (80%)**

**Several SE London (20%)**

What age group(s) will benefit?

**All ages**

What gender will beneficiaries be?

**All**

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

**A range of ethnic groups**

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

**41-50%**

## Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Advice worker salary, National Insurance, Pension	36,226	36,821	37,789	110,836
Administration	5,772	5,916	6,064	17,752
Recruitment	500	0	0	500
Travel	250	256	262	768
Telephone	500	513	526	1,539
Stationery, books, computer peripherals	750	769	788	2,307
Supervision	1,298	1,330	1,363	3,991
Office running costs	3,804	3,900	3,998	11,702
Accommodation costs	3,629	3,719	3,812	11,160

<b>TOTAL:</b>	<b>52,729</b>	<b>53,224</b>	<b>54,602</b>	<b>160,555</b>
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**What income has already been raised?**

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0

<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
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**What other funders are currently considering the proposal?**

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0

<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
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**How much is requested from the Trust?**

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## Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month: <b>March</b>	Year: <b>2013</b>
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Income received from:	£
Voluntary income	0
Activities for generating funds	0
Investment income	1,503
Income from charitable activities	1,190,904
Other sources	0
<b>Total Income:</b>	<b>1,192,407</b>

Expenditure:	£
Charitable activities	1,107,441
Governance costs	6,963
Cost of generating funds	0
Other	0
<b>Total Expenditure:</b>	<b>1,114,404</b>
<b>Net (deficit)/surplus:</b>	<b>78,003</b>
<b>Other Recognised Gains/(Losses):</b>	<b>0</b>
<b>Net Movement in Funds:</b>	<b>78,003</b>

Asset position at year end	£
Fixed assets	8,677
Investments	0
Net current assets	477,275
Long-term liabilities	0
<b>*Total Assets (A):</b>	<b>485,952</b>

Reserves at year end	£
Restricted funds	93,547
Endowment Funds	0
Unrestricted funds	392,405
<b>*Total Reserves (B):</b>	<b>485,952</b>

\* Please note that total Assets (A) and Total Reserves (B) should be the same.

### Statutory funding

For your most recent financial year, what % of your income was from statutory sources?  
61-70%

### Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

None

### Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.

	2012 £	2013 £	2014 £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	376,735	399,446	479,455
London Councils	84,194	31,573	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	188,942	157,331	270,135

### Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	2012 £	2013 £	2014 £
The Big Lottery	107,640	207,447	173,622
MacMillan Cancer Support	95,592	84,857	66,145
Trust for London	18,049	37,500	37,500
Dimbleby Cancer Care	29,497	26,513	30,830
Citizens Advice	15,720	19,107	28,230

### Declaration

I confirm that, to the best of my knowledge, all the information I have provided in this application form is correct. I fully understand that City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance.

Please confirm: Yes Full Name: **Sally Causer**

Role within Organisation: **Development Manager**