

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Sutton Borough Citizens Advice Bureaux	
If your organisation is part of a larger organisation, what is its name? Member of Citizens Advice	
In which London Borough is your organisation based? Sutton	
Contact person: Mr Steve Triner	Position: Borough Advice Services Manager
Website: http://www.suttoncabx.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1061654/0
When was your organisation established? 04/09/1939	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Reducing Poverty
Which of the programme outcome(s) does your application aim to achieve? More people accessing debt and legal services
Please describe the purpose of your funding request in one sentence. To develop our Welfare Benefit Appeal Project, currently an unfunded pilot project, into a larger project that better meets demand for welfare benefits appeal support
When will the funding be required? 02/06/2014
How much funding are you requesting? Year 1: £27,622 Year 2: £28,451 Year 3: £29,304 Total: £85,377

Aims of your organisation:

SBCABx, like all CABx, aims "to provide the advice people need for the problems they face and to improve the policies and practices that affect people's lives"

We provide free, confidential, independent and impartial advice.

Main activities of your organisation:

Our telephone and website 'gateway' system ensures that our work is focussed on those people and issues where our advice will make the greatest impact. In 2013/14, we took a total of 11,842 enquiries through our gateway. Our general advice service, i.e. advice provided by volunteers, provided 2218 appointments in the last year. Our projects include our Capitalise debt service that in 2012/13 advised 865 clients; our Independent Advice Services that advises clients referred by social services; our 'Check your Benefits' project that provides welfare benefits entitlement advice to 500 clients a year with disabilities / long term health problems. Our Sutton Advice Link project provides CAB advice at seven locations across the borough in partnership with multiple NFP agencies. We usually have 75 active volunteers.

SBCABx regularly makes recommendations and suggestions for service and legislative improvements to local and national decision makers. E.g we recently met with our MPs about the probable impact of further legal aid cuts.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
11	9	8	75

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?
Leased	two years

Summary of grant request

We need to develop our Benefits Appeal Project (BAP) to meet demand. The BAP has run since September 2012 as a small, unfunded pilot project. In last 12 months, it assisted 24 clients out of the 109 people who requested support with their appeal. The project's appeal success rate is 82% (the national success rate is below 40%) with average financial gains of £6616 per client. The project is not sustainable without funding.

We have trained law students to assist clients with First Tier Tribunal appeals by producing submissions and helping them to collect relevant evidence. The students work on the FTT submissions at home but attend the bureau one evening a week to discuss their work with a supervisor. The supervisor approves the submissions before they are sent to the client and the Tribunal. The project is distinct from our core service as the students cannot usually volunteer during the day and do not have the time to train as actual advisers.

We will expand the project with a 0.5 FTE supervisor who would be available two evenings a week to support the students; provide email support at other times; check and co-ordinate their work and use the project's experience to identify and make recommendations to Decision Makers to tackle the causes of poor decision making. The supervisor would train and support the students with a wider range of appeals than currently available such as overpayment and sanctions appeals and Upper Tier Tribunals. Upper Tier appeals are currently particularly important as many aspects of new welfare benefits legislation need to be clarified by the UTT but justice requires support for clients with such appeals to ensure fair challenges to the DWP interpretations. The PIP roll-out will increase demand for appeals support.

We would easily recruit additional students to the project as many law students prefer volunteering for a charity to internships with commercial firms. We do not currently have adequate staff to train, support and supervise more students. The increased supervision would enable the students to interview clients to produce statements and therefore reduce the reliance on medical evidence. Many health professionals are reluctant to provide medical evidence.

The results from the successful pilot project would be replicated on a larger scale. We hold the Advice Quality Standard with case work in four advice topics including welfare benefits. We are the only organisation in the borough providing significant welfare benefits appeals support. We work with eight organisations such as the Mental Health Foundation and the Carers Centre, all of whom can / would refer clients to the BAP.

The project will reduce poverty by enabling more people to access legal advice. 60% of our debt clients are in receipt of welfare benefits. We anticipate that nearly all of the project's clients would be of working age. CPAG state that "the risk of a non-disabled child being in poverty in a household with a disabled adult is 29% in a household receiving disability benefits, but this rises to 43% in a household not receiving disability benefits."

We consult widely with our service-users in the management and running of the service. We have carried out three client telephone surveys in the last six months and used the data to make improvements such as to our telephone system. We welcome people from all backgrounds as clients, volunteers, staff and trustees. We have 'Two Ticks -- positive about Disabled People' accreditation. We have the 'Expert in Volunteering' certificate from our Volunteer Centre. We have had an environment audit and have taken steps such as loft insulation, default double sided printing and cycling promotion.

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

Not Applicable

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.

In the last year we have trained 12 students who worked on the project. We would increase that number to 36 students per year

We would expand the scope of the project to include 'Set Aside' applications and Upper Tier Tribunal appeals. We estimate that we would undertake at least 15 Upper Tier Tribunal appeals a year

In the last year, we produced 24FTT submissions. We would, with increased student numbers, increase that number to 140 and then 150 submissions per year

We would analyse the appeal cases and produce a report on the reasons for the incorrect original decisions. We would produce six monthly / four monthly reports to try to improve the accuracy of DWP decision making.

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.

We would anticipate that scaling-up the project would increase total financial gains to at least £500,000 per annum

We would survey BAP clients to obtain data as to the impact of the successful appeals on poverty reduction and quality of life. We know from experience of a carers income maximisation project that the increased income not only reduces poverty but reduces stress and improves health

The evidence we submit to the DWP may help improve decision making which means that even people who have not directly accessed the service will indirectly benefit from it.

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?

We will seek alternative funding to continue the project.

Who will benefit?

About your beneficiaries

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

150

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

Sutton (100%)

What age group(s) will benefit?

0-15

16-24

25-44

45-64

65-74

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?

81-90%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
0.5 FTE Project Worker Salary costs	16,537	17,033	17,544	51,114
Management Time	3,027	3,118	3,211	9,356
Overheads / Volunteer Expenses / ICT etc	8,058	8,300	8,549	24,907
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	27,622	28,451	29,304	85,377
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
Not applicable	0	0	0	0
Not applicable	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
None	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
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TOTAL:	27,622	28,451	29,304	85,377
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Finance details

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

Financial year ended:	Month: March	Year: 2013
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Income received from:	£
Voluntary income	21,090
Activities for generating funds	2,006
Investment income	6,409
Income from charitable activities	676,312
Other sources	114,666
Total Income:	820,483

Expenditure:	£
Charitable activities	800,145
Governance costs	7,017
Cost of generating funds	0
Other	11,068
Total Expenditure:	818,230
Net (deficit)/surplus:	2,253
Other Recognised Gains/(Losses):	0
Net Movement In Funds:	2,253

Asset position at year end	£
Fixed assets	36,156
Investments	0
Net current assets	279,670
Long-term liabilities	0
*Total Assets (A):	315,826

Reserves at year end	£
Restricted funds	32,362
Endowment Funds	0
Unrestricted funds	283,464
*Total Reserves (B):	315,826

* 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?
81-90%

Organisational changes

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

In April 2013, our Legal Aid contracts for welfare benefits and debt ended. In 2012/13, our legal aid income was £103,659. In 2013/14, we expect legal aid income of approximately £30,000. Our ASTF funding for 13/14 is £87,722 (net). Our income for 13/14 is forecast to be £18600 lower than previous year but with increased costs on e.g. salaries, utilities and pensions

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	444,752	423,055	438,414
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	226,328	167,343	106,175
Other statutory bodies	121,495	137,657	131,569

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 £
Lloyds TSB Foundation	0	12,800	12,000
Advice Services Fund	0	0	56,311
NHS Charitable Trust	0	16,900	21,350
Citizens Advice Financial Capability	0	6,436	0
Rayne Foundation	4,000	10,000	0

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: **Steve Triner**

Role within **Chief Executive**
Organisation:

Funding required for the project

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

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