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The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Shelter National Campaign for Homeless People Limited	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Islington	
Contact person: Ms Helen Osment	Position: Trust & Lottery Fundraiser
Website: http://www.shelter.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 263710
When was your organisation established? 13/01/1972	

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 More Londoners with improved economic circumstances
Please describe the purpose of your funding request in one sentence. To provide expert housing, welfare benefit and debt advice to households in Hackney facing homelessness and bad housing.
When will the funding be required? 01/12/2014
How much funding are you requesting? Year 1: £58,425 Year 2: £59,618 Year 3: £60,835 Total: £178,879

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Aims of your organisation:

Shelter helps over a million people a year struggling with bad housing or homelessness - and we campaign to prevent it in the first place. We're here so no-one has to fight bad housing or homelessness on their own.

A home is more than bricks and mortar. It's a place of safety and belonging. Without one, your chances in life are severely set back. All it can take is an unexpected trigger like redundancy, illness or relationship breakdown for a family to slip into a downward spiral. The tough economic climate is leaving more people at risk of losing their home. Our aim is to meet the rising demand for our work and ensure everyone gets the support they need to find and keep a decent, stable home. Our bold campaigning aims to secure a better housing future for all.

Main activities of your organisation:

Through our national helpline, website and network of local services, we provide information, advice and support to people in housing crisis. We provide specialist face-to-face housing, debt and legal advice, advocacy and intensive support services across 21 locations in England and Scotland. Our national helpline, open 365 days a year, provides expert advice on a wide range of housing issues and is able to take on longer term casework for more complex problems. Our website provides information and guidance on a wide range of housing and homelessness issues.

Directly informed by the experiences of the people we help, our campaigns make a powerful case for long-term change to protect the most vulnerable in society. For example, we have been focusing on fixing private renting for England's nine million renters, protecting the housing safety net and calling for building more affordable homes.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
871	413	15	1,733

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?
Owned	

Summary of grant request

We are requesting funding for the full costs of a Senior Advice Support and Guidance (ASG) Worker in Hackney to provide housing, debt and welfare benefits advice to local people in housing need. This role is attached to Shelter's new Hackney Family Support Service which focuses on preventing homelessness and promoting access to decent, affordable homes for families with complex needs.

Hackney is classed as the most deprived local authority in England. The borough faces a prevalence of issues surrounding housing and poverty, for example:

- Nearly 19% of households are living in unsuitable housing
- Homelessness among local families increased by 19% last year
- 30% of Hackney's children are living in poverty
- 2,055 children in Hackney spent last Christmas without a permanent home

The Senior ASG Worker's role has two remits: providing added value to the family support service by delivering specialist advice to service users and assisting people in housing need in the wider community. His work is mainly delivered through advice surgeries in partner locations - currently Mind, Family Action and Job Centre Plus. These surgeries help households experiencing housing, debt and welfare benefit problems. Families needing more intensive support can be referred to the family support service. The Senior ASG Worker is crucial in reaching out to the community, increasing access to advice.

The level of advice given is adapted to the needs of the client and the intensity of their problem. This ranges from shorter consultations to longer term, in-depth casework. Alongside specialist housing advice, the Senior ASG Worker provides generalist debt and welfare benefits advice to help people manage their finances - a key factor in keeping a home. The Senior ASG Worker can make referrals to other Shelter services, such as our Legal team. He also refers families to other agencies as needed, including mental health support, debt management, domestic violence support, employment and education services.

Over the past 48 years, Shelter has built a strong reputation as a housing and homelessness expert and reputable advice provider. We have a robust track record of working in Hackney through our Legal Aid funded service and a project funded by the Oak Foundation advising residents affected by the development of the 2012 London Olympic Games site. Before taking up his current post, the Senior ASG Worker was the Adviser on this project.

The project meets the City Bridge Trust's Reducing Poverty programme outcomes by improving access to advice on housing, welfare benefits and debt. It works to improve the economic circumstances of disadvantaged Londoners by unravelling the many factors behind housing crises. Poverty, bad housing and homelessness are closely interconnected. Housing problems rarely exist in isolation and are often experienced alongside, or exacerbated by, issues such as mental or physical ill health, relationship breakdown, financial problems, unemployment and chaotic family lives. A home is the starting point from which families can begin to improve their economic situation.

We listen to the people who use our services and have established a Board Advisory Panel and National Involvement Network to formally involve service users in Shelter's governance. A programme of service user events is currently being designed in Hackney. We value diversity and work to ensure we are accessible to all. By working in partnership with local organisations, advertising widely in Hackney and utilising many referral routes, we aim to reach families who need us from across the community. As the project is new, we are developing our volunteering opportunities but plan to involve volunteers. We are working towards ISO 14001 Environmental Management certification and have elected Green Champions in each of our office sites.

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

N/A

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

Specialist Quality Mark

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.

840 Hackney residents (280 per year) will receive housing, debt and welfare benefits advice

Approximately 2,400 individuals (800 per year) will benefit overall (based on an average of 2.9 people per household)

80 advice surgeries in at least three partner locations will be delivered per year

Referrals received from other Shelter services and external organisations

Referrals made to other services

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.

Homeless families are able to access accommodation

Families at risk of losing their homes are able to maintain their tenancies

Families at risk of losing their homes are able to manage their finances, including tackling debt and accessing appropriate financial support

Improved housing conditions through addressing issues such as damp and disrepair

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 hope to continue to deliver the service beyond the funding period through a combination of statutory funding and voluntary income. We aim to achieve this by ensuring the service delivers measurable outcomes, cost savings for statutory services, delivers against local priorities and matches with Shelter's national and regional funding priorities.

Who will benefit?

About your beneficiaries

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

280

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

Hackney (100%)

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?

21-30%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary costs: Senior ASG Worker	37,781	38,559	39,352	115,693
Salary costs: Management Support	4,366	4,453	4,542	13,360
Salary costs: Administrative Support	7,205	7,349	7,496	22,051
Travel and accommodation	476	486	496	1,458
Communications (telephone and postage)	422	430	439	1,291
Office equipment, office material and stationary	297	303	309	910
Rent	1,254	1,279	1,305	3,838
Irrecoverable VAT	132	134	137	403
Central support costs (e.g. Finance, HR, IT)	6,492	6,624	6,759	19,875
TOTAL:	58,425	59,618	60,835	178,879

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

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: March	Year: 2013
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Income received from:	£
Voluntary income	26,067,000
Activities for generating funds	10,002,000
Investment income	244,000
Income from charitable activities	17,224,000
Other sources	0
Total Income:	53,537,000

Expenditure:	£
Charitable activities	37,841,000
Governance costs	167,000
Cost of generating funds	20,778,000
Other	0
Total Expenditure:	58,786,000
Net (deficit)/surplus:	-5,249,000
Other Recognised Gains/(Losses):	653,000
Net Movement in Funds:	-4,596,000

Asset position at year end	£
Fixed assets	6,417,000
Investments	9,032,000
Net current assets	3,157,000
Long-term liabilities	1,044,000
*Total Assets (A):	17,562,000

Reserves at year end	£
Restricted funds	9,761,000
Endowment Funds	39,000
Unrestricted funds	7,762,000
*Total Reserves (B):	17,562,000

* 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?
21-30%

Organisational changes

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

We have a new Chair and Trustee John Rogerson was replaced by Ros Micklem. The deficit generated in 2012/13 was due to planned additional expenditure from reserves built up since 2010 to offset an anticipated reduction in government funding and to fund investment linked to Shelter's three-year strategic plan. Some of this planned additional expenditure was continued in 2013/14.

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	0	0	0
London Councils	303,000	309,000	392,054
Health Authorities	0	0	0
Central Government departments	3,122,000	2,904,000	3,234,354
Other statutory bodies	6,871,000	6,811,000	5,590,587

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 £
Esmee Fairbairn Foundation	0	0	132,000
BBC Children in Need Appeal	134,188	100,000	100,000
Scotshill Trust	100,000	0	0
Oak Foundation	38,412	130,688	0
Ingram Trust	75,000	60,000	60,000

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: **Helen Osment**

Role within **Trust & Lottery Fundraiser**
Organisation: