

# The City Bridge Trust

## Investing In Londoners: Application for a grant



### About your organisation

Name of your organisation: <b>Haven</b>	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? <b>Hammersmith &amp; Fulham</b>	
Contact person: <b>Ms Tasha Mason</b>	Position: <b>Head of Trusts and Foundation</b>
Website: <a href="http://www.thehaven.org.uk">http://www.thehaven.org.uk</a>	
Legal status of organisation: <b>Registered Charity</b>	Charity, Charitable Incorporated Company or company number: <b>1061726</b>
When was your organisation established? <b>04/01/1997</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>More people accessing debt and legal services</b>
Please describe the purpose of your funding request in one sentence. <b>To continue to provide our free Welfare Benefits and Money Advice Service in order to improve the financial circumstances of cancer patients in London.</b>
When will the funding be required? <b>06/01/2015</b>
How much funding are you requesting? Year 1: <del>£432,552</del> Year 2: <b>£44,505</b> Year 3: <b>£45,570</b> <b>Total: £133,626</b>

**Aims of your organisation:**

Our aim is to help people through the experience of breast cancer, which is often the worst thing that will ever happen to a woman and her family. We help them achieve the best possible quality of life, as they cope with the shock of their diagnosis and the unpleasant side-effects of their medical treatment, and long into the future. We provide all our services free of charge so that we are available to anyone who needs our help, including patients' partners and children.

We have three Havens, in London, Hereford and Leeds, and a growing outreach programme. Our Havens are tranquil day centres where Visitors receive a free in-depth programme of treatment and emotional support from skilled therapists, who liaise closely with each Visitor's GP and hospital team.

**Main activities of your organisation:**

Our completely free services are led by specialist cancer nurses and supported by experienced counsellors, nutritionists and therapists. Our Havens provide an individually-tailored programme of care for breast cancer patients, our Visitors, that includes emotional and psychological support, advice on healthy eating, information and advice on how to cope with the financial impact of cancer that can be severe, exercise, stress management and a range of individual therapies, groups and classes. We run a weekly drop-in service with our breast care nurse and have an entirely volunteer-run café offering nutritious and inexpensive meals. We also provide free counselling for our Visitors' partners and families.

To date we have supported over 12,000 Visitors with more than 150,000 individual therapy appointments. A recent service evaluation shows that 91% of Visitors report improvements to concerns and symptoms after coming to a Haven, and 80% stated that their therapy programme was essential for recovery.

**Number of staff**

Full-time:	Part-time:	Management committee members:	Active volunteers:
26	8	4	80

**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

Many cancer patients are unaware of the financial support available to them and need help accessing it. This adds hugely to the stress caused by their cancer and affects the whole family, especially those in single parent families. Having cancer is hard enough, but when you are living on very little money it is desperately tough. Our Welfare Benefits and Money Advice Service, based at our London Haven, ensures that vulnerable cancer patients are able to access the support they need to allow them to cope during their illness and treatment and focus on the one thing that really matters: getting better.

Our Service provides cancer patients with the information and practical support they need to cope with concerns such as debt issues, entitlement to benefits, and employment and housing. Our free Service provides individual money advice and information for patients who are affected by any type of cancer and is available to anyone, anywhere - although of the 370+ patients our Service has helped in its 26 months of operation, three quarters of those accessing it are London residents. Our skilled and experienced Adviser provides a caseload service of individual advice as well as telephone consultations, drop-in sessions and regular seminars on money management and employment law.

Macmillan Cancer Support provided funding for the first two years of this Service and approved continuation funding for one year from May 2014; this expires at the end of May 2015. We would be extremely grateful for a grant from The City Bridge Trust to enable our Service to be maintained and expanded, and we anticipate reaching 750+ direct beneficiaries.

Our project will improve our Service, building on its strong foundation to increase effectiveness and capacity. We will do this by:

1. Keeping up with the high demand for our Service, which makes a real, tangible difference to the lives of cancer patients through its provision of free, specialised advice;
2. Training two new volunteers to assist our Adviser, who will provide basic level advice and ensure our Adviser can concentrate on more complex cases;
3. Expanding the free (and popular) seminar programme, run by our Adviser, which covers money management and employment law; and
4. Promoting the Service to reach more cancer patients across London, particularly those affected by cancers other than breast cancer and those who are least able to manage without this kind of support.

The ongoing aim of our Service is to ensure that cancer patients and their families:

- a) are more financially stable, with a focus on those who are most vulnerable because of poverty, ill-health and/or lack of access to relevant information;
- b) are more informed and confident about all issues that affect their financial situation.

Feedback from our Visitors is vital. Through focus groups, pilot groups and monitoring the effectiveness of our services we are able to continually adapt and share our provision to ensure we are best meeting the needs of cancer patients and their families, friends and carers. We welcome, and actively seek, comments and opinions from users in order to improve what we offer. From our record of the financial outcomes our Adviser has secured, and the feedback we receive from Service users, we know that this is a hugely valuable service. A key part of the Service going forward will be the introduction of trained volunteers to provide much-needed additional capacity.

Our Havens are open to anyone who could benefit from our help and we are mindful of reducing our carbon footprint - eg we use energy-saving light bulbs and ecological cleaning products, save electricity, limit printing and use recycling bins.

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

What Quality Marks does your organisation currently hold?

**The Haven takes very seriously its responsibility to provide accurate advice and information for anyone accessing our services. We continue to be certified with The Information Standard for all information that we provide for our Visitors and have successfully completed our third annual review. We are currently applying for the Advice Quality Standard as we feel it would be beneficial to have this Standard in place as an assurance for our Visitors and those organisations referring their patients to us. We have begun the process of obtaining the QAS Accreditation and, if successful in our application for funding from The City Bridge Trust, would strive to have it in place before any grant awarded by the Trust was used.**

### **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.

**Provide a caseload Service offering cancer patients the information, advice and practical support they need to cope with their financial situation, including advice on debt, entitlement to benefits, employment and housing, to enable them to manage the financial impact of their illness and plan ahead.**

**Recruit and train two volunteers to act as 'first tier' support to assist our Welfare Benefits and Money Adviser and increase Service capacity throughout the project. We will benefit from the advice and expertise of the CAB regarding this volunteering model through our strong links with Wandsworth CAB.**

**Provide additional help with finances and employment through a timetabled schedule of free seminars held at our London centre. These will offer specialised advice on a number of issues such as budgets, managing and staying out of debt, returning to work and what to expect from your employer.**

**We aim for 15% of Service users by the project's end to be living with cancers other than breast cancer and will reach out to cancer patients in areas of high deprivation across London, to ensure our Service is used by those who are most financially vulnerable.**

**Increase access to our Service for hard-to-reach cancer patients (elderly patients and those from black and minority ethnic (BME) communities) by establishing specific outreach opportunities across London using local support groups, community groups and churches, to ensure these groups are aware of our Service and can access it.**

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.

**To empower cancer patients to become financially stable throughout their experience of cancer and beyond - helping them to mitigate the substantial costs associated with cancer and enable them to continue to provide for themselves and their families during a difficult time, and plan for the future.**

**To make cancer patients more informed and confident about all issues that affect their financial situation (ie. access to benefits, debt management, employment rights and housing) and where they can access help; our Service signposts patients to other agencies if their needs demand greater expertise than we can provide.**

**To improve London's money and debt environment through the dissemination of quality information support and advice, helping to prevent inappropriate use of services such as payday loans or credit cards that can often exacerbate existing problems. Skilled early intervention ensures patients manage sustainable and affordable repayments throughout their cancer journey.**

**To improve the financial circumstances of London's most financially vulnerable groups (due to poverty, ill-health and/or lack of access to relevant information), helping to reduce social deprivation and social exclusion within the capital. Accessing our Haven gives service users the chance to connect with others and develop peer support networks.**

**To empower cancer patients and give them the confidence to take the next step on their survivorship path - both personally and professionally - to support their wellbeing in the longterm, whatever shape this next step might take (eg reconnecting with family and friends, returning to the workplace or retraining).**

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?

**This Service is integral to maintaining our programme of holistic care and support for our Visitors and their families. We aim to fully fund the Service on a permanent basis through grants from trusts and foundations when any grant comes to an end.**

# Who will benefit?

## About your beneficiaries

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

750 Revised to 500 over  
3yrs Howard

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

13/2/15.

**London-wide (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?

**1-10%**

## Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Welfare, Benefits and Money Adviser full time salary, NI and pension contributions	39,000	39,780	40,576	119,356
Annual training and conference attendance for Adviser inc.travel	100	210	104	414
Annual software subscriptions to 'Advice Pro' and 'Quick Benefits Calculator'	1,460	1,489	1,519	4,468
Volunteer costs (training, travel, lunch)	1,421	1,424	1,523	4,368
Monitoring and evaluation	817	833	1,065	2,715
Administration costs	754	768	783	2,305
	0	0	0	0
	0	0	0	0
<b>TOTAL:</b>	<b>43,552</b>	<b>44,505</b>	<b>45,570</b>	<b>133,626</b>

**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
<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**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
<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**How much is requested from the Trust?**

Expenditure heading	Year 1	Year 2	Year 3	Total
Welfare, Benefits and Money Adviser full time salary, NI and pension contributions	39,000	39,780	40,576	119,356
Annual training and conference attendance for Adviser inc.travel	100	210	104	414
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<b>TOTAL:</b>	<b>43,552</b>	<b>44,505</b>	<b>45,570</b>	<b>133,626</b>

## Finance details

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

Financial year ended:	Month: <b>May</b>	Year: <b>2014</b>
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Income received from:	£
Voluntary income	2,332,283
Activities for generating funds	263,293
Investment income	6,894
Income from charitable activities	0
Other sources	31,286
<b>Total Income:</b>	<b>2,633,756</b>

Expenditure:	£
Charitable activities	1,582,428
Governance costs	45,409
Cost of generating funds	635,017
Other	0
<b>Total Expenditure:</b>	<b>2,262,854</b>
<b>Net (deficit)/surplus:</b>	<b>370,902</b>
<b>Other Recognised Gains/(Losses):</b>	<b>0</b>
<b>Net Movement in Funds:</b>	<b>0</b>

Asset position at year end	£
Fixed assets	2,809,462
Investments	2
Net current assets	714,999
Long-term liabilities	( 411,807 )
<b>*Total Assets (A):</b>	<b>3,112,656</b>

Reserves at year end	£
Restricted funds	1,270,066
Endowment Funds	0
Unrestricted funds	1,842,590
<b>*Total Reserves (B):</b>	<b>3,112,656</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?  
0%

### Organisational changes

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

Jane van Zyl has replaced Simon Lanyon as Operations Director, following his retirement in late May 2014.



### 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	0	0	1,000
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

### 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 £
Walk the Walk	675,000	312,500	312,500
Macmillan Cancer Support	1,475	79,348	92,946
The Sodexo Foundation	30,000	52,500	23,924
The Eveson Charitable Trust	35,000	35,000	35,000
The Garfield Weston Foundation	30,000	30,000	30,000

### 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: **Tasha Mason**

Role within                      **Head of Trusts and Foundations**  
Organisation:

# APPENDIX A

## (REVISED REQUEST)



### The Haven's Welfare Benefits and Money Advice Service Project Budget Breakdown – February 2015

	Y1 (2015-16)	Y2 (2016-17)	Y3 (2017-18)	PROJECT TOTAL
	£	£	£	£
<b>I. Baseline salary including on costs (NI and pension contributions)</b>	<b>39,000</b>	<b>39,780</b>	<b>40,576</b>	<b>119,356</b>
<b>II. Activity eligible for funding from The City Bridge Trust*</b>	<b>25,350</b>	<b>27,846</b>	<b>28,403</b>	<b>81,599</b>
*Assumes a baseline of 65% of activity in Year 1 directed for the benefit of London residents, as shown by Service use to date (May 2012 to January 2015), and 70% for Years 2 and 3 in expectation of growth resulting from increased outreach activities across London				
<b>Annual training and conference attendance</b>				
Assumes 1 yearly training session in volunteer engagement/ welfare benefits advice run by Macmillan Cancer Support (London) and 1 yearly training session run by a law firm (London), plus local travel for these; yearly attendance at AdviceUK annual conference (Years 1 & 3 London, Year 2 Birmingham) including travel and accommodation in Year 2	100	210	104	414
<b>Annual software subscriptions 'Advice Pro' and 'Quick Benefits Calculator'</b>	1,460	1,489	1,519	4,468
<b>Volunteer costs training and expenses - travel and lunch</b>				
Assumes 2 volunteers per year, half a day website training with our Marketing Manager for each volunteer; each volunteer travelling to The Haven one day per week on average (London travel card of £8.50), including lunch from our kitchen (£5pp). Salary cost includes all on costs	1,421	1,424	1,523	4,368
<b>Monitoring and evaluation</b>				
(Midpoint evaluation at the end of Years 1 and 2, substantial evaluation at the end of Year 3. These to be conducted by our Senior Research Fellow (5 days in total), Information and Support Manager (3 days in total) and Haven Programme Manager (3 days in total). Salary costs include all on costs)	817	833	1,065	2,715

<b>Administration costs</b>				
(Handling one-to-one appointments and workshop bookings, queries and cancellations, as well as set-up/tear down for workshops. 1 hour per week for our Receptionist @£15.70 per hour (includes all on costs))	754	768	783	2,305
<b>TOTAL associated costs</b>	<b>4,552</b>	<b>4,724</b>	<b>4,994</b>	<b>14,270</b>
<b>TOTAL requested for associated costs from The City Bridge Trust: 65% of costs in Year 1 and 70% of costs in Years 2 &amp; 3</b>	<b>2,959</b>	<b>3,307</b>	<b>3,496</b>	<b>9,762</b>
<b>PROJECT TOTAL</b>	<b>13,552</b>	<b>14,505</b>	<b>15,570</b>	<b>43,627</b>
<b>Initial project contribution requested from The City Bridge Trust</b>	<b>28,309</b>	<b>31,153</b>	<b>31,892</b>	<b>91,354</b>
<b>Funding already received</b>				
The Freemasons' Grand Charity (for 2015-16 only; unrestricted within the project budget)	30,000			30,000
<b>TOTAL contribution requested from The City Bridge Trust</b>	<b>13,552</b>	<b>31,153</b>	<b>31,892</b>	<b>76,604</b>

NB: all costs assume a 2% yearly increase.