

MEETING: 26/11/2015

Ref: 12906

ASSESSMENT CATEGORY - Reducing Poverty

Body & Soul

Adv: Tim Wilson

Amount requested: £86,545

Base: Islington

Benefit: London-wide

Amount recommended: £86,500

The Charity

Body & Soul supports families in London who are living with, or closely affected by HIV. The charity has over 4,000 registered members and welcomes around 80 new members each quarter. Services are offered to children, young people, young adults and older adults (over 30) across five programme areas: mental health; physical health; psycho-social wellbeing; maximising productivity; and practical support. New members typically find Body & Soul via clinics, other charities (including many within City Bridge Trust's grant portfolio) and from social workers. Self-referrals also occur.

The Application

This application concerns the charity's Practical Support programme, with funding used to expand current advice services, to allow more time with members and to develop self-help activities. Until recently the programme was funded by a three year grant from the John Ellerman Foundation. Since that award came to a natural conclusion, Body & Soul has sustained the service with unrestricted funds.

The Recommendation

Body & Soul's practical support programme is well-established. Providing services that help members manage what would often otherwise be chaotic lives, a grant from City Bridge Trust will allow the charity to engage more people and offer beneficiaries more support time. Body & Soul has sustained this programme with its own funds in recent months, and an award from City Bridge Trust will provide the stability to develop the service. Funding is advised as follows:

£86,500 over three years (£28,000; £28,800; £29,700) for a full-time Head of Casework and Advocacy, overseeing the delivery of Body & Soul's Practical Support programme. The award is conditional on confirmation that the charity has achieved the Advice Quality Standard.

Funding History

| Meeting Date | Decision |
|--------------|---|
| 20/01/2011 | £50,200 over three years towards the salary costs of a worker supporting teenagers living and affected by HIV in London. |
| 08/09/2005 | £50,000 towards the costs of refurbishing a Children's Centre for children and young people affected by HIV/AIDS in London. |

Background and detail of proposal

Body & Soul estimates that approximately 70% of its adult clients need support with their welfare. The charity has identified growing needs for debt and housing advice, as well as support to address food poverty. The organisation is currently resourced to deliver approximately 5,300 episodes of casework each year with these interventions provided by a team of skilled volunteers and the Head of Casework and Advocacy. In addition, pro bono volunteers deliver welfare and legal advice to

members. Typical presenting issues range from benefit sanctions, managing the daily costs of living, and housing costs, all of which have an impact on members' emotional and mental health.

If today's funding request is approved the charity will deliver 144 drop-in Help Centre interventions each week offering signposting, support with hardship and benefit applications, debt and housing advice. In addition, Body & Soul will run 12 group workshops each year to increase members' personal financial management, 12 legal clinics each year, and complete at least 160 applications for emergency and long-term hardship relief. The post-holder will manage an expanded team of volunteers to assist with the delivery of the work.

Financial Information

The charity advises that, as of 6th November, £1,094,849 (84%) of its forecast income for the year ending 31st December had been confirmed.

Free reserves are expected to remain below target in the current year. The charity expects the free reserve position to improve in 2016 but acknowledges the need for further work and has established an Advisory Board to work towards improving the organisation's sustainability.

| Year end at 31 December | 2014 Audited | 2015 Current Year Budget | 2016 Forecast |
|---|------------------|--------------------------------|------------------|
| Income and Expenditure | £ | £ | £ |
| Income | 1,293,746 | 1,301,500 | 1,450,000 |
| Expenditure | 1,276,354 | 1,212,000 | 1,375,000 |
| Unrestricted Funds Surplus / (Deficit) | 4,035 | (43,000) | 131,000 |
| Restricted Funds Surplus / (Deficit) | 13,357 | 132,500 | (56,000) |
| Total Surplus / (Deficit) | 17,392 | 89,500 | 75,000 |
| Surplus / (Deficit) as a % of turnover | 1.3% | 6.9% | 5.2% |
| Cost of Generating funds (% of income) | 175,423 (13.6%) | 154,500 (11.9%) | 164,500 (11.3%) |
| Free unrestricted reserves | | | |
| Unrestricted free reserves held at Year End | 157,618 | 114,618 | 245,618 |
| How many months' worth of expenditure | 1.5 | 1.1 | 2.1 |
| Reserves Policy target | 319,089 | 303,000 | 343,750 |
| How many months' worth of expenditure | 3 | 3 | 3 |
| Free reserves over/(under) target | (161,471) | (188,382) | (98,132) |