

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Waltham Forest CAB	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Waltham Forest	
Contact person: Ms Suna Panayiotou	Position: Chief Executive
Website: http://www.walthamforestcab.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1075780
When was your organisation established? 18/01/1999	

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 Londoners with improved economic circumstances More people accessing debt and legal services
Please describe the purpose of your funding request in one sentence. To extend outreach services to GP surgeries in Waltham Forest, reaching more vulnerable clients living in poverty who may not currently be accessing our support.
When will the funding be required? 01/04/2016
How much funding are you requesting? Year 1: £45,397 Year 2: £46,244 Year 3: £47,631 Total: £139,272

Aims of your organisation:

Waltham Forest Citizens Advice Bureau provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination. Our aims are:

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives.
- To be recognised and respected as the main generalist advice agency in Waltham Forest
- To attract additional resources into Waltham Forest to provide additional services for the benefit of its citizens, sharing our good practice and providing support to other not-for-profit organisations
- To be recognised and respected as a leading advice agency in Greater London in those areas where we have developed specialist services (welfare benefits, debt, and immigration) and targeted outreach services
- To be recognised and respected for the quality of the social policy information produced from the service we provide, highlighting welfare benefits reform, poverty, discrimination, equality and human rights.

Main activities of your organisation:

During 2014/15 we supported 7,507 clients. 74% of enquiries were resolved through our generalist gateway service, and a further 26% of clients were provided with specialist advice, information and casework services in welfare benefits, debt, employment and immigration for vulnerable clients e.g. those with mental ill health as well as for those living in social housing.

We helped clients to claim £1,180,659 in benefit entitlements, and supported them in writing off debt of £416,090.

We have a number of relationships in place with key partners to ensure that all clients can be referred for a more specialist level of support if required. We are the lead partner in the Advice Waltham Forest Partnership, within this we ensure that all cases requiring medium or high level advocacy are referred to one of our key partners within the partnership.

We deliver our services from our bureau in Walthamstow, and through daily outreach sessions utilising local libraries, children centres, and Job Centre Plus.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
16	14	13	18

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	10 years

Summary of grant request

Aims

It is our strategic ambition to explore ways in which we can extend our reach into the community, so that we reach more vulnerable individuals, in particular those with mental ill health, physical and learning disabilities, long-term illnesses and health conditions.

With funding from the City Bridge Trust we would like to extend our outreach services -both specialist and generalist, to include GP practices across Waltham Forest. By working with GP's we will be able to increase our reach to those that need it most.

Delivery

We will put in place a model as follows:

- Prescription based referrals appointments for advice and support.
- Where possible referral appointments will take place in the GP Practice, within a regular outreach clinic
- Patients visiting the GP practice can also attend the outreach clinics on an ad-hoc basis without an appointment if required -- the clinics will be promoted with leaflets and posters in each GP practice.
- Once need has been established during a referral appointment, the Caseworker will aim to resolve the issue at the first appointment, or make further appointments -- utilising our higher level advocacy partners within Advice Waltham Forest if more specialist support is needed.

Initially we propose working with 3 GP practices in the borough, and will extend this to 4 over the 3 years of the funding.

Need and why WF CAB?

We have strong relationships with many GP practices in the area, and we know that they recognise the importance that timely advice and support can have on an individuals health outcomes. We already have agreement in principle from 3 GP practices in the borough: Lime Tree Surgery, Leytonstone; Lime Tree & Sinnott Healthcare, Walthamstow; Oliver Road Medical Surgery, Leyton.

Our client's problems, usually financial, have a negative consequence for their health and wellbeing and GPs report an increasing need for social welfare advice.

By working with GP's we can ensure that our advice and action can be at an earlier stage, as a preventative measure, rather than at a crisis point. Interventions are likely to prevent homelessness, money and debt problems, and improve access to benefits.

Programme Outcomes

Working with GPs to extend our reach to more vulnerable people will enable us to improve the economic circumstances of 1200 individuals that may not have accessed our support otherwise. We know that within our mental health specialist support provision we do not currently reach all that need it in the borough. We don't currently receive any referrals from GP's, and yet we know that this is where many individuals may first raise problems coping with debt, housing related issues, benefit support -- which often result in a requirement for legal support. We will increase the number of individuals accessing out debt and legal services support through this new outreach service.

Good practice principles:

- we seek feedback from all clients via surveys, and adapt services accordingly, we are in process of setting up a formal user-forum.
- We will work with GP clinics to ensure that we reach the most vulnerable. WF is ranked the 15th most deprived borough nationally. 62% of the population is from minority ethnic backgrounds. 29% of our clients have a disability or long-term health condition.
- We have 18 volunteers providing 5100 hours of service. These are from the local community and their ongoing development, training and support is a key element of our Volunteer Strategy.

- We have a comprehensive Environmental Statement with practical actions in place around sourcing food, our supply chain procurement, transport, use of energy, waste and general awareness and provision of advice.

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

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

What Quality Marks does your organisation currently hold?

AQS - both generalist and specialist with case work for debt, employments and benefits

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.

To establish outreach clinics in 4 GP centre's across Waltham Forest, (3 in Year 1, 4 in Year 2) ensuring a presence in the north, south, east and west of the borough.

Awareness sessions held with GP's, nurses, and key staff at each clinic that signs up to the project, together with promotion of outreach clinics throughout the clinics via leaflets and posters.

To provide advice and support appointments via GP social prescription to individuals with mental ill health, physical and learning disabilities, long-term illnesses and health conditions. Each individual will receive a diagnostic interview and follow up for intensive care work or a 'warm referral' to an Advice Waltham Forest partner organisation.

To provide outreach clinics in each GP on a monthly rotation basis, so that all clients can access our services on an ad-hoc basis. This will ensure that we reach more individuals who are within the GP practice, and have support needs, but may not raise them with their GP.

Develop a long term business case and sustainability strategy for GP outreach services, and 'advice on prescription' model.

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 reach more individuals that need our support: 300 clients a year referred for appointments via 'prescription' model, and a further 120 access our GP outreach clinic.

More individuals in Waltham Forest have improved economic circumstances: with targets in place for the average benefit gain, debt repayments written off or re-scheduled, and prevention of homelessness.

Clients have improved confidence at handling their economic circumstances: they will be provided with the tools and signposting to better manage their personal finances, and referral to employment services where needed.

More individuals in Waltham Forest access our debt and legal services, and are given legal services support where needed. All clients requiring higher level advocacy will be referred to an Advice Waltham Forest partner if appropriate.

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 work closely with the Clinical Commissioning Group and GPs throughout the pilot as key stakeholders so that we establish the best model to achieve outcomes for our clients. We will use this evidence to apply for continued funding, and to develop a robust business case and sustainability strategy for the project.

Who will benefit?

About your beneficiaries

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

420

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

Waltham Forest (100%)

What age group(s) will benefit?

16-24

25-44

45-64

65-74

75 and over

What gender will beneficiaries be?

Male

Female

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
GP Outreach Project Caseworker 1FTE	34,657	35,697	36,768	107,121
Quality and Network Co-ordinator 0.05 FTE	2,700	2,781	2,864	8,345
Staff Recruitment	500	0	0	500
Staff Training	500	515	530	1,545
Travel Costs	120	124	127	371
Telecoms and IT	720	742	764	2,225
Publicity costs	100	103	106	309
Overheads	6,100	6,283	6,471	18,854
	0	0	0	0

TOTAL:	45,397	46,244	47,631	139,272
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
none at this stage	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 at this stage	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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Finance details

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

Financial year ended:	Month: March	Year: 2015
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Income received from:	£
Voluntary income	421
Activities for generating funds	0
Investment income	157
Income from charitable activities	1,044,858
Other sources	0
Total Income:	1,045,436

Expenditure:	£
Charitable activities	977,983
Governance costs	9,554
Cost of generating funds	0
Other	0
Total Expenditure:	987,537
Net (deficit)/surplus:	57,899
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	57,899

Asset position at year end	£
Fixed assets	31,355
Investments	0
Net current assets	309,790
Long-term liabilities	0
*Total Assets (A):	341,145

Reserves at year end	£
Restricted funds	10,797
Endowment Funds	0
Unrestricted funds	330,348
*Total Reserves (B):	341,145

*** 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	544,270	546,361	606,912
London Councils	0	0	0
Health Authorities	56,694	57,000	64,500
Central Government departments	183,441	51,741	2,617
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 £
Big Lottery - Advice Services Transition Fund	0	87,903	171,756
Ascham Homes	37,494	90,000	90,000
Trust For London	0	37,500	37,125
Toynbee Hall Project	45,000	45,825	43,876
London & Quadrant Housing Association	0	18,975	23,650

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: **Suna Panayiotou**

Role within **Chief Executive**
Organisation: