

Disability Advice Service (East Suffolk)

Annual Report and Accounts

1 April 2017– 31 December 2017

CIO Charity Number: 1152772

www.daseastsuffolk.org.uk



**NATIONAL
LOTTERY FUNDED**

Highlights 1 April – 31 December 2017

- ◆ This is the **33rd year** that the Disability Advice Service has been offering advice and support to disabled people and carers in Suffolk Coastal.
- ◆ We have supported our clients to gain approximately **£1,056,573** in benefits.
- ◆ We have advised **957 Clients**
- ◆ We have dealt with **4,388 Enquiries**.
- ◆ We **won 51 of the 63 appeals cases** where a decision was reached (**81%**). And dealt with a massive 200 appeals throughout the year!
- ◆ We were awarded **£301,210 over three years** by the National Lottery through the Big Lottery Fund.
- ◆ We held our first public consultation event in May 2017.
- ◆ We **gave £4,260** as small grants to individuals.
- ◆ We continued our partnership with the **Multiple Sclerosis Society** to deliver advice to their members across our area.
- ◆ We completed a new Work Experience Project in collaboration with local Job Centres.
- ◆ Our **Customer Forum** continued to meet and help us to improve our service, and elected a representative to our Management Committee.
- ◆ We developed our **outreach services** to Leiston and Felixstowe and planned similar services to Saxmundham
- ◆ We worked with SNAP (now Homegroup) to deliver housing help and advice.
- ◆ We continued to be part of **Ipswich County Court Advice and Representation Service (ICCARS)**

Disability Advice Service (East Suffolk)

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Martlesham Heath
Ipswich
Suffolk, IP5 3SL

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E-mail: admin@daseastsuffolk.org.uk

Management Committee

Trustees

Stella Morris (Chairperson)
Leigh Horton (Secretary)
Robin Stroud (Treasurer)
Stephen Doe (Vice Treasurer)
Jo Cowley
Yvonne Everson
Andy Simpson
Nigel Farthing
Jean Gooch
Janet Garfield
Roy Gilmour

Associate member

Amanda Strowger

Suffolk Coastal District Council representatives

Cllr Mark Amos
Cllr Doreen Savage

Teresa Rose, Independent Examiner
Kevin Curtis, Patron

Paid Staff

Jenny Morcom, Manager
Caroline Goldsmith, Senior Welfare Rights Adviser
Colin Williamson, Administration & Fundraising Officer
Jess Hargrave, Welfare Rights Adviser
Nicky Jay, Training Officer

Volunteers

Anne Barnes
Simon Shaw
Donna Frankis
Louise Liddell
Jess Hargrave
Dee Woolnough
Brendan McArdle
Alan Parsons
Roz McSweeney
Margaret Shaw

Liz Warden
Sue MacGregor
Amanda Jones
Joyce Robinson
Roy Gilmour

9-month overview

We have produced this report because we have changed our financial year from April to March to January to December. This report covers the period from 1 April 2017 to 31 December 2017 and is a little shorter than our usual Annual Report.

Disability Advice Service (East Suffolk) (DAS) is an independent advice service for disabled people and family carers living in the Suffolk Coastal area. We are part of a wider network of disability advice services throughout Suffolk working to county-wide standards that are equivalent to nationally agreed community legal services (CLS) standards.

Our charitable objective is the relief of people with disabilities in East Suffolk, and our aim is for disabled people and their carers to have increased financial, social and psychological well-being through holistic advice. All financial, strategic and operational decisions by the Trustees are made with due regard to our charitable objective, aim, and the Charity Commission's Public Benefit Guidance.

To this end we provide advice on welfare rights, housing rights, accessible leisure activities, equipment, health and social care services, employment rights and permitted work, as well as referral to accredited providers of debt and legal advice. We are constantly developing our working relationships and partnerships with related organisations so that no-one in need of help and advice gets passed from pillar-to-post.

Customer numbers continued to be high, and DAS helped 957 people over 9 months. This means that our annual figure would have been likely to exceed the year before. Appeals also continued to dominate our work, and we overturned 81% of decisions.

Our Work Experience Project ended in December 2017 after gaining great success with 11 young people successfully completing placements at DAS. All moved closer to the labour market going on to paid work, apprenticeships, study and further work experience.

In May 2017 we held our first 'Consulting the Community Conference' which was attended by 27 people, 12 of whom (44%) were disabled. The conference gave us great insight in to the needs of disabled people and how best to tackle them. We learned that we needed to get our service closer to people's homes, improve our telephone advice availability and that we have a huge impact on psychological as well as financial well-being.

During the 9-month period we were successful in gaining funding from the Big Lottery covering approximately 72% of the costs of our main advice project. This welcome support gives us financial security for the next 3 years, but we have some demanding outcomes to achieve:

- Decreased isolation through access to advice closer to home
- Improved mental and financial well-being through prompt advice and intensive advice
- Reduced isolation, increased confidence and skills for volunteers
- Increased capability as an organisation to deliver these outcomes.

I would like to thank our Customer Forum for working so hard to make this bid successful with meetings in March and May, and Sarah Grieveson who helped us to smarten and focus our proposals.

I would also like to thank our partners in MS Society, Home Group, Suffolk Disability Advice Services (SDAS), the Financial Inclusion and Advice Team, Housing Options, CABs and many many more other statutory and voluntary sector agencies without whom we would not be able to meet the needs of our local communities. And of course we are so grateful to our funders, including our customers who often donate to DAS.

Lastly I would like to thank all our Trustees, staff, volunteers, Customer Forum members, funders and supporters in the local community who together make DAS such a trusted and expert service.

Stella Morris
(Chair)

Treasurers Report: Robin Stroud

I present the statement of financial activities and balance sheet for the 9 month period ended 31 December 2017.

The reason for the 9-month period is the decision to change the accounting year to January to December to bring it in line with the Big Lottery year.

The period has seen continued high activity and I have to report that we finished the nine months with a £20,322 deficit. We had an income of just under £52K and this has been achieved by the hard work in attracting donations, grants and fundraising. This leaves us with a final bank balance of £42,515

In line with our financial policies all of this is our reserves fund and includes £2,180 of restricted funds.

The good news is we have secured a 3-year grant from the Big Lottery, which will fund 72% of our expenditure from January 2018.

During my time as Treasurer I continue to be very impressed in the total efforts of the staff, committee and volunteers in the delivery of a quality service and the combined contribution to the financial aspect both visible and hidden.

As I have mentioned previously, the voluntary efforts in advisor work, administration, IT support, committee duties and fundraising have a tremendous hidden value. A conservative estimate of the total number of hours involved with this is some 60 hours a week. Therefore, over a year at say £26 an hour if they had to be paid for, these efforts have contributed a hidden income or saving on expenditure of over £80,000

All involved have to be congratulated and I would like to thank all those involved and extend special thanks to those that have assisted me directly with the accounts work over the year.



Robin Stroud
February 2018

Disability Advice Service (East Suffolk)
Reg. Charity 1152772

Disability Advice Service (East Suffolk)
Registered CIO Charity 115772

Balance sheet as at 31 December 2017 for the 9 month Period Apr-Dec

2016-17 £	Activity	2017 £	2016-17 £	Assets	2017 £
234	Cash	157	157	Cash	453
7,787	Current Ac	11,653	11,653	Current Ac	2,895
55,872	CCLA	51,083	51,083	CCLA	39,167
	Unpr cq	-56	-56		
-1056	Deficit	-20,322			
62837		42515	62837		42515
			52,816	Reserves	40,335
			10,021	Restricted	2,180
			0	Unrestr'd	0
					42,515

Note. As the £520 held in the current account for the Coastal Forum is not DAS funds, it has been removed from the general accounts and balance sheet. It is accounted for on the current account bank reconciliation statement.

Agreed to be a true record and accurate statement of our accounts, which have been duly examined.

Robin Stroud
Hon. Treasurer



Stella Morris
Chair



Disability Advice Service (East Suffolk) ANNUAL ACCOUNTS

GENERAL ACCOUNT Apr-Dec - 2017

Disability Advice Service (East Suffolk)

Accounts for the period 1 April to 31 December 2017

General Account		2017			2017
		APR - DEC			APR - DEC
2016-17	EXPENDITURE		2016-17	INCOME	
58,572	Salaries, HMRC, Pension	45,600	31,681	SCC	31,206
27	Recruitment	34	4,995	MS Society	1,998
15,381	Rent & service charges	12,839	4,243	Donations	2,648
3,218	Travel	2,158	211	CCLA interest	83
388	Training	374	50,285	Fund raising	1,068
2,494	Telephone & internet	1,622		SCDC	2,000
698	Postage	476		Grants restricted	8,000
593	Stationery	338		Grants unrestricted	1,000
1,934	Insurance	270		Town & Parish Councils	2,350
0	publicity	20			
153	Refreshments	113			
1,370	Books/Publica/Subs	1,213			
168	Fees/AGM/Gifts	280			
1,969	Office equipment	2,098			
1,136	Cleaning	828			
1,268	Fund raising costs	146			
0	Legal/DBS/Licences	109			
2,546	Utilities	1,688			
2,990	Client grants Development	1,844	2,434	Client Grants	1,510
		135			
94,905	SUB TOTAL	72,185			
-1,056	DEFICIT	-20,322			
93,849	TOTAL	51,863	93,849		51,863

Grants and Donations 1 April 2017 – 31 December 2017

Local authority grants	£
Blaxhall Parish Council	20
Bramfield and Thorington Parish Council	200
Clopton Parish Council	75
Cookley and Walpole Parish Council	20
Grundisburgh Parish Council	50
Great Glemham Parish Council	50
Martlesham Parish Council	500
Peasenhall Parish Council	25
Saxtead Parish Council	30
Ubbeston Parish Council	0
Total	970

Other Major Grants and Donations

Organisation	£
Dunwich Town Trust	1,000
Woodbridge Deben Rotary Club	250
Total	1250

Independent examiner's report on the accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
DISABILITY ADVICE SERVICE (EAST SUFFOLK)

On accounts for the
period

1 April to 31 December 2017

Charity no
(if any)

1152772

(Name and address of the registered office of a Charitable Incorporated Organisation)

Respective
responsibilities of
trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed. ~~{The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [named body]]. Delete [] if not applicable.~~

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention

Basis of independent
examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

continued

**Independent
examiner's statement**

In connection with my examination, no material matters have come to my attention (~~other than that disclosed below~~*) which gives me cause to believe that in, any material respect:

- * the accounting records were not kept in accordance with section 130 of the Charities Act; or
- * the accounts did not accord with the accounting records; or
- * the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*


**Independent
examiner's statement**

In connection with my examination, no material matters have come to my attention (~~other than that disclosed below~~*) which gives me cause to believe that in, any material respect:

- * the accounting records were not kept in accordance with section 130 of the Charities Act; or
- * the accounts did not accord with the accounting records; or
- * the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed:  Date: 13/2/18

Name: TERESA ROSE

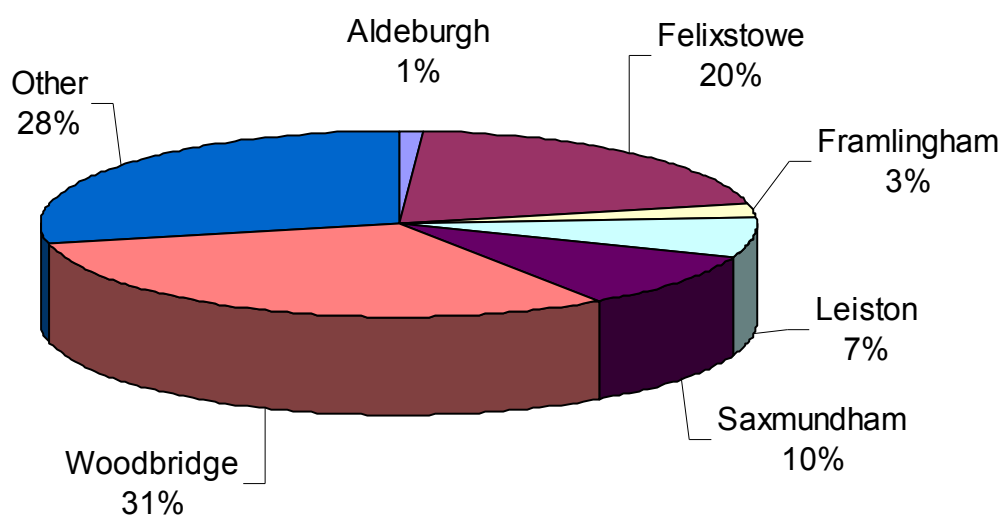
Relevant professional qualification(s) or body (if any):

Address: 6 BELGRAVE CLOSE
IPSWICH, IP4 2TT
SUFFOLK

Benefit	Gain £
Appeals	239,454.1
Attendance Allowance	35,344.95
Disability Living Allowance	50,219.90
Employment Support Allowance	187,736.55
Job Seekers Allowance	3,247.40
Pension Credit	3,172
Personal Independence Payment	525,680.53
Unspecified	11,718.4
Total	1,056,573.83

The total benefit awarded to clients as a result of our work this year was approximately £1,056,573 highlighting the essential need for our service in the East Suffolk Coastal area.

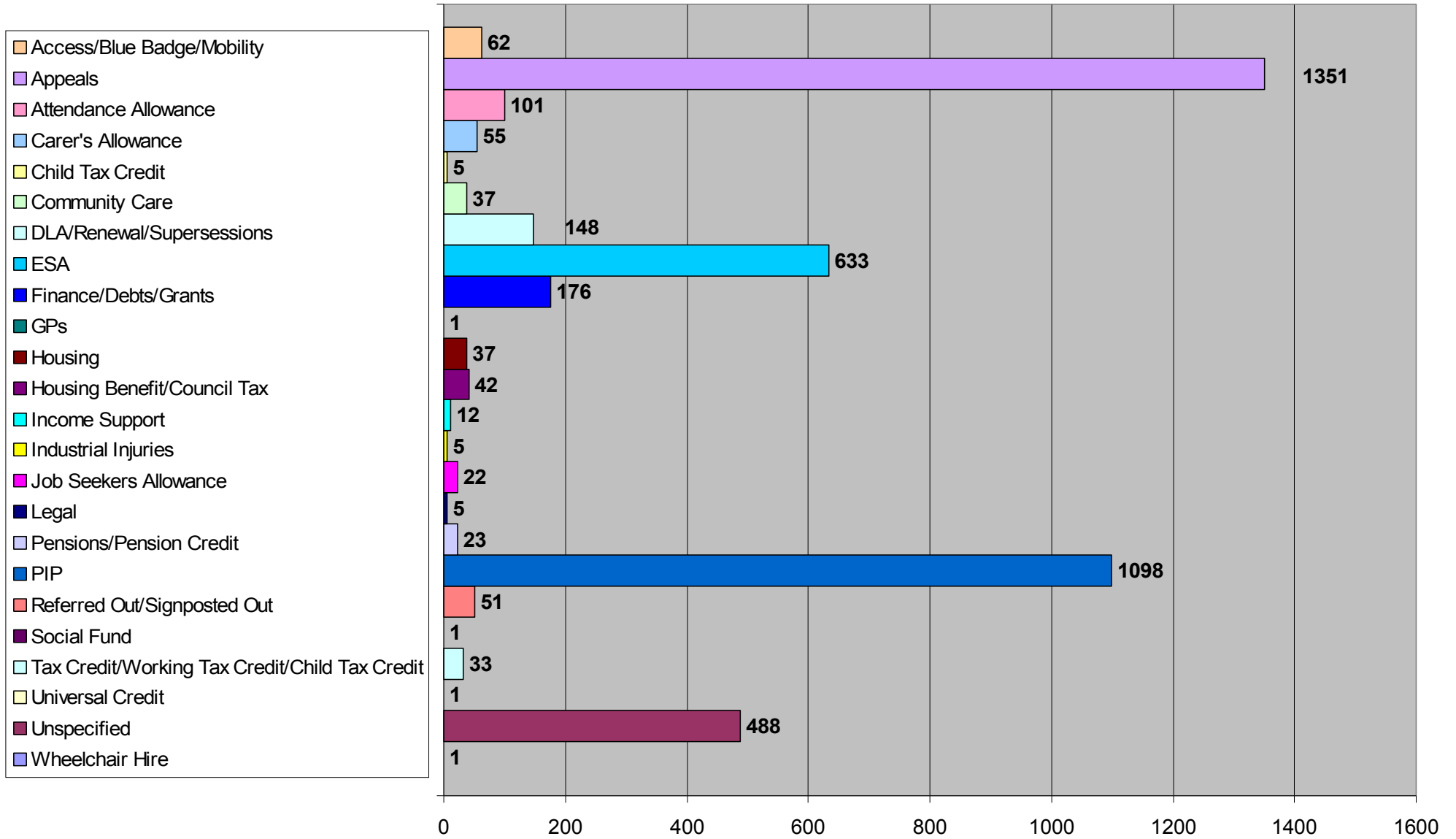
Enquiries by Town and Surrounding Area



Financial Gain by Area: 1 April 2017 – 31 December 2017

Area	Gain £
Aldeburgh	7,337.20
Felixstowe	258,247.10
Framlingham	25,516.80
Greater Ipswich & Kesgrave	241,893.30
Leiston	84,525.86
Saxmundham	123,145.60
Woodbridge	293,311.27
Other	22,596.70
Total	1,056,573.83

Enquiries by Case Category April - December 2017



Clients = 957

Enquiries = 4388

Disability Advice Service (East Suffolk)

Helping people of all ages

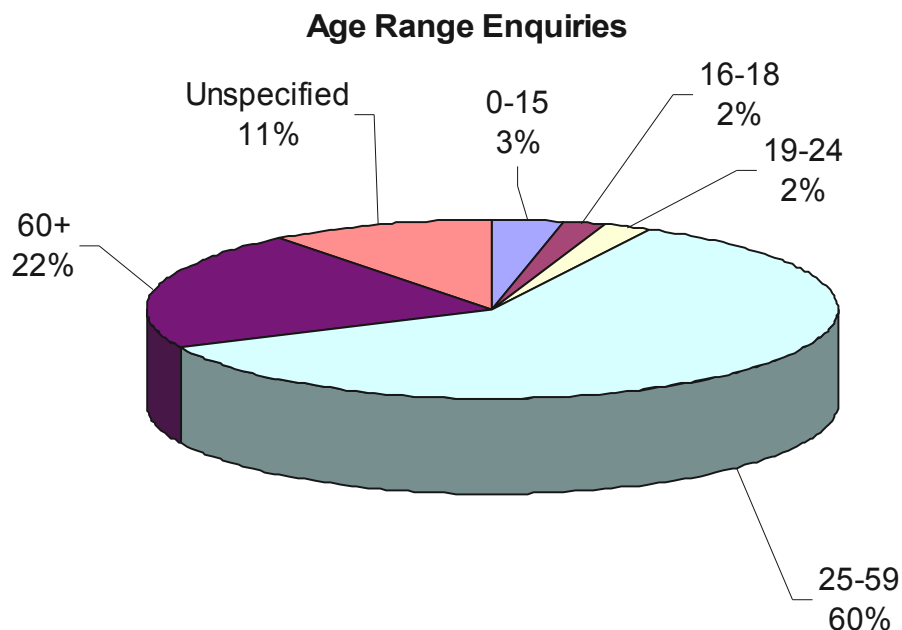
DAS is an independent advice service and specialises in issues relating to disabled people and their carers. We are based in Martlesham Heath, but we offer free help and advice to people over much of the Suffolk Coastal district.

The 4,388 enquiries DAS has received this year have been varied and encompass the following categories.

- ◆ Welfare benefits and tax credits
- ◆ Advocacy and appeals
- ◆ Housing adaptations and special equipment
- ◆ Accessible transport, holidays and leisure activities
- ◆ Help with education and employment retention
- ◆ Home and respite care
- ◆ Access issues and disability discrimination
- ◆ Fundraising

Disability can affect anyone of any age and we do our best to advise and support people of all ages who require our help.

The pie chart below shows the diverse age ranges of people affected by disability that DAS has been able to help during the year.



Customer comments

We pride ourselves on the quality of service we give to our clients. However, we are always trying to improve the service so we politely request that clients fill out a customer satisfaction survey anonymously so we can target areas for further improvement.

Here are some of the comments made by our customers. We have left them in their own words:

- ◆ I found that the staff that I met on my visits to DAS were kind helpful and informative. Overall my experiences were of total contentment.
- ◆ Lovely people and have patients of saints.
- ◆ Very helpful. Very understanding and have great knowledge.
- ◆ Always excellent and reassuring.
- ◆ I was treated with respect and understanding would have no hesitation in using service again
- ◆ A great service and very helpful. Everyone I spoke to gave good advice and has made the form easier to understand and complete. An invaluable service to have.
- ◆ Without their help I would not be able to complete any of the forms I have to fill in.
- ◆ Made to feel at ease and welcome.
- ◆ Absolutely great, very helpful.
- ◆ The people at DAS Martlesham are wonderful. They are very helpful, polite and supportive. They do an amazing job and provide an invaluable service. They have my eternal gratitude.
- ◆ VERY PLEASED INDEED
- ◆ 😊😊
- ◆ WOULD BE IN A MESS WITHOUT THEM
- ◆ 10/10
- ◆ A very helpful and sympathetic advisor, thank you for your help.

Grants/donations awarded

The Disability Advice Service (East Suffolk) gratefully acknowledges the financial support of:

Bramfield and Thorington Parish Council
Dunwich Town Trust
Rushmere Parish Council
Multiple Sclerosis Society
Suffolk County Council
Woodbridge Town Council
Bramfield & Thorington Parish Council
East of England Co-Op
Grundisburgh Parish Council
Woodbridge Town Council
Great Glemham Parish Council
Martlesham Parish Council
Peasonhall Parish Council
Woodbridge Deben Rotary Club
Suffolk Coastal District Council

And all the town parishes and clients that have supported our work throughout the year.

Donations big or small are a vital aid in providing our service in the East Suffolk area.