

# APPLICATION FORM FOR GRANT 22/23

Please read the policy on pages 1, 2 and 3 **before** filling in the form.

1. Name/Address of Organisation:

Citizens Advice Central Dorset

1 Acland Road

Dorchester

DT1 1JW

Name of person making the application: Daniel Cadisch

Position in organisation: Chief Officer

Contact phone number: Supplied

Email address: Supplied

## About Your Organisation

2. Does your organisation:

	Yes
Have its own bank account, which requires two unrelated people to authorise cheques and make withdrawals?	Yes
Have at least three members on its management committee	Yes
Have a constitution, terms of reference or set of rules ( <i>please contact for help with this if needed</i> )	Yes

3. Are you a registered charity? Yes/No: Yes

If so, please give your charity number: 1089018

4. Is your organisation part of, or affiliated to, a larger organisation?

If so, which: CACD is an independent local charity – we are a member of the national association for Citizens Advice Bureaux in England, Wales and Northern Ireland which provides support for our organisation as well as ensuring the quality of the advice we provide.

5. Aims and objectives of your organisation; What does your organisation do and how does it benefit the residents of Weymouth?

**We give people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.**

The aim of Citizens Advice Central Dorset is to provide the advice people need for the problems that they face and flowing from this, the improvements of policies and practice that affect their lives. Our core principles are to:

- value and respect diversity,
- promote equality,
- challenge discrimination and unfairness,
- work together and value the contribution of colleagues.

We give free, confidential, independent and impartial advice to anyone, regardless of age, disability, ethnic origin, gender, race, religious belief or sexual orientation,

We provide an advice service to local residents of Weymouth through drop-in sessions and appointments at our office in Weymouth library and our outreaches at Littlemoor Community Centre, Bridges Medical Centre, Royal Crescent surgery and Wyke Regis Medical Practice.

Weymouth residents can also access advice by telephone by calling the Dorset Adviceline on 0800 1448848.

6. Where does your organisation meet? n/a
7. How often do you meet? n/a
8. How many members does your organisation have? As of January 2023, we have 46 paid members of staff and 112 volunteers in total, plus 12 Trustees who act in a voluntary capacity
9. How many people will benefit from this funding? We estimate that 900 local residents per year will benefit from this additional capacity. This is equivalent to 4,500 people helped over the 5 years.
10. How many of these are Weymouth Town Council area residents? 100%
11. How much funding are you applying for? £5,000 p.a. for 5 years
12. What is the total cost of your project? £5,000 per annum

**NOTE:** Weymouth Town Council will only approve allocations up to £5,000 in exceptional circumstances that are clearly detailed in question 15, with regard to the information in Policy point 6.

13. Briefly describe the project or purchase you would like the funding for:

Many of the residents in Weymouth are struggling to survive on low incomes and having to make daily decisions on whether to pay their rent, turn on their heating pay for food or pay for medical prescriptions. This has been made significantly worse by the long term impact of the COVID-19 pandemic and the rising cost of living which has left many people at crisis point.

Our advice service is seeing an unprecedented demand for our help, with individuals and families unable to make ends meet and taking on rising debt as a result. In 2022-23 we helped 3,510 Weymouth residents, a 90% increase on the year before, and we expect that rising trend to continue for a number of years. We are stretched beyond our existing capacity and urgently need to take on new advisers and supervisors to cope with the increasing demand.

**We are therefore requesting funding to contribute to the costs of delivering our expanding core advice service in Weymouth, enabling us to focus on those who are most in need, living in areas of deprivation, or who are most vulnerable due to physical and mental ill health. The funding will be targeted in the areas of greatest deprivation in Weymouth. We will do this by delivering additional advice and support to those residents who are experiencing the highest deprivation.**

14. Which of the Council's priorities does the project contribute to?

- Improve the wellbeing of the people of Weymouth.
- Manage the Council's assets and resources responsibly and transparently.
- Manage the Council's services effectively to meet the needs of the communities we serve.
- Work to become greener and cleaner in our activities as well as supporting our communities and partners to be as green as possible.
- Promote opportunities for economic success of the area.
- Strive for continuous improvement and service development.
- Work with partners to deliver our core values and strategy.

15. If your application is for between £3,000 and £5,000 please give full details of the **exceptional circumstances** relating to your request. Please see policy point 6 for examples of what constitutes exceptional circumstances

Members of the local community in Weymouth are facing truly exceptional unforeseen circumstances through no fault of their own, and are at imminent and direct risk of financial hardship which will inevitably have an impact on the physical and mental wellbeing of themselves and their families, and the economy of the local area.

With this additional funding, we can expand our service, helping more vulnerable residents in the Weymouth area, maximising their incomes through claiming welfare benefits to which they are entitled and applying for grants, and minimising their expenditure by reducing energy bills and managing debt.

In 2022/23 we achieved £1,774,856 in financial gains for Weymouth residents, mostly in claiming welfare benefits to which they are entitled. A further £511,965 was gained in charitable grants.

16. How will you spend the money you are applying for? Please remember that Weymouth Town Council do not normally give grants for running costs unless associated with a specific project:

The funding will contribute to the core costs of running the Weymouth office, which is based in the Library in the centre of the town. This will include:

- Developing our supervision capacity to enhance our ability to deliver advice by supporting advisers working from home and in the office
- Costs of recruiting, training and supervising new advisers
- Volunteer expenses
- Training for our existing advice team to enable them to respond to new issues arising for our clients
- Management costs of delivering our new hybrid service model which ensures we remain flexible and responsive to local circumstances.

Item	Amount
Total	£5,000p.a.

17. How else are you funding your project? Include grants from other organisations, fund raising and existing reserves:

Source	£	Confirmed?
n/a		
Total		

18. How will the funding benefit the community or residents of Weymouth?

This funding will enable us to expand our vital service across Weymouth, focussing on those most in need and helping vulnerable local residents to deal with the rising cost of living. It will directly target those residents who are most vulnerable.

19. If your project focusses on a particular area of Weymouth, please give the name of the Councillor who is supporting your application?

n/a

20. How do you know that the groups you work with, or the local community, want this project to take place? Please detail any consultation undertaken:

The high demand for our advice service is evidence of the rising need for support within the local community. Our partners at the local foodbanks, in Littlemoor and Westham are supportive of the need for an expansion in our service.

In 2022-23, 88% of our clients said they would be likely to recommend our service,

21. How will this funding lead to greater self-sufficiency and lessen the need for future applications?

The funding will enable us to support greater activity amongst our team of volunteer advisers in order to cope with the cost of living crisis. Our volunteer advisers often stay for many years once trained which builds in long term sustainability.

22. How is your organisation normally funded? Not applicable to new organisations:

Our core service is funded through a contract with Dorset Council and through grants from local authorities in Dorset. We have a number of specialist projects which are funded by a variety of organisations, including NHS Dorset, local foodbanks and charitable organisations.

23. What are your current/planned subs/fees/charges?

n/a – our advice is delivered free of charge

24. Have you applied for any other funds/grants towards the cost of this project or purchase? Please include details below:

n/a

25. What fund raising activities took place in the **last** 12 months and what fund-raising activities are planned for the **next** 12 months, if any?

We are continually looking for new and repeat sources of funding to fund our core service and specialist projects. We work closely with the other two local Citizens Advice in Dorset to fund funding for Dorset-wide projects.

With the other two local Citizens Advice, we have recruited an income generation officer who will help us develop new fundraising activity such as attracting legacies, corporate funding and high net worth individuals.

Pre Covid, our volunteers in Weymouth were active in organising fundraising social events such as concerts or quizzes – we hope that this activity will resume once our offices are back to a regular routine.

26. Anticipated income/expenditure for the next 12 months?

Anticipated income 2023-24: £1,094,679  
Anticipated expenditure 2023-24: £1,101,424  
Deficit £6,745 taken from the 23/24 budget.

27. Details of any grants or financial support received from local authorities including Weymouth Town Council in the past three years with dates:

Please see below

28. Grants from non-local authority sources in the last three years with dates, if you have any:

Please see below

29. Has the project that you want the funding for already happened? **No**

30. Will you be passing the funding on to any other groups (except to pay for goods and services)? **No**

31. If the funding is for security measures do you have the support of the local police and/or crime reduction officer?

**Not applicable**

32. If the funding is for work with vulnerable adults or children, do you have the support of either Adult Social Care or Children's Services at Dorset Council?

**Not applicable**

Please give us details of the bank account that the grant should be paid into if approved (this cannot be a building society passbook account):

Name of Account: **Supplied**

Account number: **Supplied**

Sort Code: **Supplied**

**Please ensure you have read the policy on pages 1 - 3 before signing the form.**

*Checklist (please tick the appropriate boxes)*

*Have you submitted the following?*

- A copy of your most recent accounts (not more than 12 months old);
- Your most recent bank account statement (to follow)**
- Details of any other investments/savings (not more than 3 months old) – see attached reconciliation of accounts:
  - CAF is our main bank account for everyday transactions.
  - Barclays is a small account we have as it allows us to have a bank card so that we can make card transactions which we cannot do with CAF.
  - COIF is an investment account - NCA require us to have reserves level of between 4 and 6 months of expenditure, hence the levels in our bank accounts
- A copy of your constitution / terms of reference / set of rules;
- A copy of the notes from your last Annual General Meeting;
- Details of your organisation's officers;
- A copy of your safeguarding policy if your group works with vulnerable adults, or children; x2
- A copy of your adopted equal opportunities policy or statement; x2
- Any other documentation you feel may help in assessing your application.

#### Privacy Notice

In accordance with the General Data Protection Regulation (GDPR), I/We agree that Weymouth Town Council will process and hold personal information about me/us and my/our group or organisation only in relation to this grant application. I/We consent to my/our personal information, including that contained in this form, being stored manually and/or electronically by

Weymouth Town Council. It will be held securely and treated confidentially for six years after an application is made. I/We understand that it will only be accessed by authorised staff members to manage the grant application process.

I also understand that Weymouth Town Council may pass details onto an official organisation where required to do so by law or contract. I/We understand that my/our data will be disposed of securely six years after the application and that I/we have the right to correct the information at any time. I/We have been made aware of my/our rights under GDPR.

Declaration:

I/We declare that the information confirmed in this application is correct and that any grant received will be applied as detailed in the request.

I/We declare that we have read the policy on pages 1 - 3 and that our application complies with the policy.

I/We declare that I/we have included all the requested information.

I/We fully understand that if I/we do not include the requested information and/or if mine/our application does not comply with the policy, the application may be rejected.

I/We fully understand that we will need to attend a Finance and Governance Committee meeting to present our request.

Signed: Supplied

Name: Daniel Cadisch

Date: 20th April 2023

[Question 27 - grants or financial support received from local authorities including Weymouth Town Council in the past three years](#)

<b>TOWN COUNCILS</b>		
2020-21	Blandford Forum Town Council	£2,500
2021-22	Blandford Forum Town Council	£2,500
2022-23	Blandford Forum Town Council	£5,000
2021-22	Dorchester Town Council	£13,600
2022-23	Dorchester Town Council	£8,000
2020-21	Gillingham Town Council	£10,000
2021-22	Gillingham Town Council	£10,000
2022-23	Gillingham Town Council	£5,000
2021-22	Portland Town Council	£250
2020-21	Shaftesbury Town Council	£4,000
2021-22	Shaftesbury Town Council	£4,000
2022-23	Shaftesbury Town Council	£4,000
2020-21	Sherborne Town Council	£8,000



2021-22	Sherborne Town Council	£9,500
2022-23	Sherborne Town Council	£8,000
2022-23	Sherborne Town Council contribution towards premises costs	£8,000
2020-21	Weymouth Town Council	£1,775
2022-23	Weymouth Town Council	£2,998
<b>PARISH COUNCILS</b>		
2020-21	Parish Councils	£1,270
2021-22	Parish Councils	£2,620
2022-23	Parish Councils	£1,450
<b>DORSET COUNCIL</b>		
2020-21	Dorset Council - core grant	£270,277
2021-22	Dorset Council - core grant	£270,278
2022-23	Dorset Council - core grant	£274,329
<b>DORSET COUNCIL FUNDING FOR SPECIFIC PROJECTS</b>		
2020-21	Dorset Council – Strategic Grant	£32,000
2021-22	Dorset Council – Strategic Grant	£32,000
2022-23	Dorset Council – Strategic Grant	£32,000
2020-21	Dorset Council - Rough Sleepers Initiative	£10,300
2021-22	Dorset Council - Rough Sleepers Initiative	£21,808
2022-23	Dorset Council - Rough Sleepers Initiative	£32,038
2021-22	Dorset Council - Advocacy unit	£30,000
2022-23	Dorset Council - Advocacy unit	£25,000
2021-22	Dorset Council – Debt Unit	£34,716
2022-23	Dorset Council – Debt Unit	£15,581
2021-22	Dorset Council - Housing grant	£14,500
2022-23	Dorset Council - Housing grant	£14,500
2021-22	Dorset Council - Inclusivity grant	£2,333
2022-23	Dorset Council – Inclusivity grant	£4,667
2020-21	Dorset Council - Income Max	£25,481
2021-22	Dorset Council - Income Max	£15,707
2022-23	Dorset Council - Income Max	£16,935
2020-21	Dorset Council - IT	£11,024
2020-21	Dorset Council - Syrian refugee resettlement	£21,387
2021-22	Dorset Council - Syrian refugee resettlement	£35,645
2022-23	Dorset Council - Syrian refugee resettlement	£29,941
2022-23	Dorset Council - Ukrainian refugee resettlement	£13,609
2022-23	Dorset Council - Household Living Fund	£10,000
2022-23	Dorset Council – SEND	£11,949

[Question 28 - Grants from non-local authority sources in the last three years with dates, if you have any:](#)

**FUNDING FOR SPECIFIC PROJECTS**

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2020-21	Access To Justice Foundation	£54,286
2021-22	Access To Justice Foundation	£108,571
2022-23	Access To Justice Foundation	£139,747
2020-21	Alice Ellen Cooper-Dean Foundation	£5,000
2021-22	Alice Ellen Cooper-Dean Foundation	£10,000
2022-23	Alice Ellen Cooper-Dean Foundation	£12,000
2020-21	ASDA Foundation	£300
2020-21	Big4Littlemoor	£12,035
2021-22	Big4Littlemoor	£12,528
2022-23	Big4Littlemoor	£12,768
2022-23	Blandford Primary Care Network	£12,333
2020-21	Dorset Clinical Commissioning Group	£72,801
2021-22	Dorset Clinical Commissioning Group	£72,801
2022-23	Dorset Clinical Commissioning Group	£72,800
2020-21	Dorset Community Foundation	£21,000
2021-22	Dorset Community Foundation	£3,000
2022-23	Dorset Community Foundation	£5,000
2020-21	Corton Hill Fund	£30,000
2021-22	Corton Hill Fund	£30,000
2022-23	Corton Hill Fund	£30,000
2020-21	Dorset Healthcare University	£9,767
2021-22	Dorset Healthcare University	£9,767
2022-23	Dorset Healthcare University	£9,766
2020-21	Energy Providers	£18,660
2021-22	Energy Providers	£21,710
2022-23	Energy Providers	£16,730
2020-21	Gamble Aware	£61,625
2021-22	Gillingham Foodbank	£10,872
2022-23	Gillingham Foodbank	£14,168
2020-21	Groundwork UK	£1,500
2020-21	Help to Claim	£49,425
2021-22	Help to Claim	£46,765
2020-21	Macmillan	£115,200
2021-22	Macmillan	£116,064
2022-23	Macmillan	£118,655
2020-21	Money Advice Service	£75,582
2021-22	Money Advice Service	£57,260
2022-23	Money Advice Service	£54,443
2022-23	Portland Foodbank	£6,500
2020-21	Prince Zaiger Trust	£8,000

2021-22	Prince Zaiger Trust	£8,000
2022-23	Prince Zaiger Trust	£8,000
2020-21	Sovereign Housing Association Ltd	£5,000
2022-23	Vale Pantry	£4,349
2022-23	Valentine Trust	£5,000
2020-21	Wessex Water	£9,000
2021-22	Wessex Water	£4,782
2022-23	Wessex Water	£2,341
2022-23	Westham foodbank	£8,736

### For Office Use Only

Grant applications must be checked against the following criteria. Any questions where the answer is no must be reported to the Finance and Policy Committee meeting where the application is being considered and must form part of the formal agenda items list for that meeting.

Yes	No (investigate)	
Yes		The grant will result in a benefit for the area covered by the Town Council and will contribute positively to the area of Weymouth?
n/a		Does the grant exclude ongoing running costs?
n/a		If the application is for running costs has the applicant included plans for where future running costs will be found from?
Yes		Is the grant for a group and not for individuals or organisations whose function is primarily undertaken by the health authority or Dorset Council's Social Services?
Yes		Is the grant for non-political or non-quasi-political organisations or projects?
	SLA	Is the grant application for £5,000 or less?
	SLA	For applications in excess of £5,000, has the applicant fully detailed the exceptional circumstances?
Yes		Does the application include the required financial and organisational information?
Yes		Is this the only application in this financial year from this group or organisation?
	No	Is the applicant based in the Town Council area? If not, has the applicant detailed what proportion of beneficiaries of the grant reside in the area?
Yes		Is the application for future funding? (i.e. not retrospective)
Yes		Is the grant for the sole use of the applying group and not to pass on money?
	SLA	Has the applicant demonstrated how one-off grant funding will lead to greater self-sufficiency and lessen the need for future applications?

	n/a	For applications for funds for security measures, does the applicant have the support of the local police or crime reduction officer?
	n/a	For projects involving vulnerable children or adults, do the organisers have the support of Adult Social Care or Children's Services at Dorset Council?
tbc		Will a representative be attending an F&G meeting?

Assessing officer: Helen Legg

Date of assessment: 31<sup>st</sup> May 2023

Decision (delete as applicable): proceed to committee

Approved as agenda item for the Finance and Governance meeting on: 7<sup>th</sup> June 2023