

APPLICATION FORM FOR GRANT 24/25

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: Provided

Email address: Provided

About Your Organisation

2. Does your organisation:

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
Have paid employees	Yes
Recruit and train volunteers?	Yes

3. Are you a registered charity? Yes

If so, please give your charity number: 1089018

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

If so, which: No, Citizens Advice Central Dorset is an independent charity. We are members of the National Association of Citizens Advice Bureaux which allows us to use the well-known brand, and ensures that we provide high quality advice and our organisation is managed effectively.

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 advice to residents of Weymouth from our main office in Weymouth library and from outreaches across the town in Littlemoor, 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 2024, we have 50 paid members of staff and 134 volunteers in total, plus 10 Trustees who act in a voluntary capacity
9. How many people will benefit from this funding? We estimate that 300 local residents per year will benefit from this additional capacity. This is equivalent to 1,500 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, urgent 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:

The long term impact of the COVID-19 pandemic and the subsequent cost of living crisis has resulted in many Weymouth residents struggling to survive on low incomes, having to make daily decisions on whether to pay their rent, turn on their heating, pay for food or pay for medical prescriptions. Many are at crisis point and need our help to maximise their income and reduce their outgoings.

Our advice service continues to see an unprecedented demand for our help, with individuals and families unable to make ends meet and taking on rising debt as a result. In 2023-24 we helped 4,389 Weymouth residents, a 25% increase on the year before. Whilst the rise in the cost of living is slowing, prices are still high and expect that position to continue for a number of years causing financial distress to individuals and families.

In Weymouth, thanks to a grant from Weymouth Town Council in 2023-24, we have increased capacity but we still urgently need to recruit and train new advisers, and to meet the salary costs of our paid advice supervisors and our small management team.

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 - those living in areas of deprivation, or who are most vulnerable due to physical and mental ill health.

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

Weymouth residents are at imminent and direct risk of poverty and mental ill-health as a result of the unforeseen consequences of the COVID-19 pandemic and the subsequent cost of living crisis.

Many local people, particularly those in areas of high deprivation, are struggling to cope financially, unable to keep their homes warm, eat healthily, pay for medical prescriptions or pay their rent and, as a result, are building up debts. The links between debt and mental ill-health are well-documented and we see that every day in the local residents that approach us for help.

With our help, we can get them back on track, helping them to apply for welfare benefits to which they are entitled, helping them to budget more effectively and negotiating with creditors to manage debts.

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	£5,000

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 maintain and 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 continuing high demand for support within the local community. Our partners at the local foodbanks, in Littlemoor and Westham, are supportive of the need to maintain and expand our service in Weymouth.

In 2023-24, 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?

This funding will enable us to recruit and train more volunteer advisers, and to support both our new volunteers, and our existing advice team, effectively ensuring greater capacity in the long term.

We are taking steps to diversify our workforce, ensuring we are more representative of our community, and bringing in younger volunteers to safeguard our longer term position.

22. Weymouth Town Council declared a Climate and Ecological Emergency in 2019 and is keen to ensure that environmental impact reduction and opportunities for environmental enhancement are mainstreamed through its work.

How will this project help improve the environment and what mitigation measures will be put in place to limit environmental impacts such as use of single use plastics, waste generation, sustainable travel, reducing energy usage?

Our Environment Strategy is reviewed annually and adopted by our Trustee Board. As an organisation, we are committed to *'Reduce, Reuse, and Recycle wherever possible in all activities so that Citizens Advice Central Dorset can contribute to a local, national and global sustainable future'*.

This includes taking action to:

- Recycle materials and reduce the disposal of waste
- Reduce care travel and encourage car-sharing where possible
- Reduce the use of energy and water

23. 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.

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

n/a - our advice is free to all

25. The Council wishes to ensure that its limited grant budget goes to help those most in need. The Council will not normally fund events or activities for which a charge is made e.g. tickets for a dinner or a fee to attend a club. If it is intended to have a charge, please let us know how much people will be charged to access this project and what steps are to be put in place to ensure as many people as possible from Weymouth are able to access the project.

If a surplus is to be made please detail how and when these funds will benefit the communities in Weymouth:

n/a

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

n/a

27. 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.

In 2023-24, we formed an internal Communications and Marketing group to support our income generation and help us develop new fundraising activity such as crowdfunding, attracting legacies, corporate funding and high net worth individuals. This work is underway but is long term in nature.

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

Anticipated income 2024-25: £1,247,270

Anticipated expenditure 2024-25: £1,240,297

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

Please see attached

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

Please see attached

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

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

33. If the funding is for security measures do you have the support of the local police and/or crime reduction officer? No

34. 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? No

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: Provided

Account number: [Provided](#)

Sort Code: [Provided](#)

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 & details of any other investments/savings (not more than 3 months old); ([*see below](#))
- ✓ A copy of your constitution / terms of reference / set of rules;
- ✓ A 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;
- ✓ A copy of your adopted equal opportunities policy or statement;
- ✓ Any other documentation you feel may help in assessing your application.

[*We attach statements for our CAF Bank account, and our COIF Charities Deposit Fund account.](#)

[Please note our reserves policy that we set aside an amount equivalent to between three and six months' operating expenditure..](#)

[Please also note that our COIF deposit account holds £100,000 grant from Access to Justice for our Improving Lives through Advice project which we were given upfront for 2024-25.](#)

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: Provided

Name: Daniel Cadisch

Date: 4th June 2024

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Grant applications must be checked against the following criteria. Any questions where the answer is no must be reported to the Finance and Governance 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?
	No	Does the grant exclude ongoing running costs?
	No	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?
	No	Is the grant application for £3,000 or less?
Yes		For applications between £3,000 or £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?
Yes		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?
	No	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?
	No	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 Finance & Governance Committee?
Yes		Scoring matrix approved by the Grant Subgroup?

Assessing officer: Helen Legg

Date of assessment: 04/07/24

Decision (delete as applicable): proceed to committee

Approved as agenda item for the Finance and Governance meeting on: 24/07/24