

Disability Advice Service (East Suffolk)

Annual Report and Accounts

1 January 2019 – 31 December 2019

CIO Charity Number: 1152772

www.daseastsuffolk.org.uk



Highlights 1 January – 31 December 2019

- This is the **35th year** that the Disability Advice Service (East Suffolk) has been offering advice and support to disabled people and carers in East Suffolk Coastal.
- We have supported our clients who were awarded approximately **£2,481,838** in benefits.
- We have advised **1,248 Clients**
- We have dealt with **5,379 Enquiries**.
- We **won 71 of the 77 appeals cases** where a decision was reached (92%) and dealt with 151 appeals throughout the year! Approximately 58 Cases have been carried over to 2020
- We were awarded **£301,210 over three years** by the National Lottery through the Big Lottery Fund. This is the Annual Report for the **2nd Year** of the Big Lottery Grant
- We **gave £4,086** as small grants to individuals.
- We continued our partnership with the **Multiple Sclerosis Society** to deliver advice to their members across our area.
- We continued our **outreach services** to Leiston/Framlingham/Felixstowe/Saxmundham/Woodbridge and their surrounding areas.
- We worked with a large group of housing officers from different organisations to deliver housing related help and advice including discretionary housing payments, housing arrears, evictions and homelessness.

Disability Advice Service (East Suffolk)

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Martlesham Heath
Ipswich
Suffolk, IP5 3SL

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Management Committee Trustees

Stella Morris (Chair)
Robin Stroud (Treasurer)
Stephen Doe (Vice Treasurer)
Nigel Farthing
Roy Gilmour
Grahame Tinnion

Jean Gooch
Janet Garfield
Abigail Osborne
Carrie Wright

Secretary to the Management Committee
Margaret Shaw

Associate member
Amanda Strowger

Suffolk Coastal District Council representatives

Cllr Doreen Savage

Daniel Jennings Chartered Accountant, Independent Examiner

Paid Staff

Dan Bristow Manager
Caroline Goldsmith, Senior Welfare Rights Adviser
Colin Williamson, Administration & Fundraising Officer
Jo Bowen, Senior Welfare Rights Officer
Donna Keenan, Volunteer Co-Ordinator
Margaret Shaw Temporary Relief Manager
Tracey Haynes, Crisis Intervention Officer

Volunteers

Anne Barnes
Louise Liddell
Dee Woolnough
Alan Parsons
Ruth Sparks
Sue Spencer
Julie Duxbury
Karen Day
Tim Jebb
Mike Rushmore
Lee Wickiewicz
Jane Christy
Chris Richards

Simon Shaw
Joyce Robinson
Liz Warden
Isobel Daisy
Anne Keen
Roy Gilmour
Andy Girling
Tony Nunn
Jemma Davidson
Margaret Harper
Alison Pledger
Natasha Hook

Vice Chairs Report: Roy Gilmour

Disability Advice Service (East Suffolk) or (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 and families and their carers 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 Commissions 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.

The last year has seen lots of changes in both staff and volunteers. We said goodbye to the following people:

Trustees – Carrie Wright, Stella Morris

Staff – Tracey Haynes

I would like to thank them all for everything they have done for the organisation.

Special thanks go to Stella Morris for leading DAS as Chair of Trustees for 6 years. Her leadership and dedication were invaluable to the organisation,

Customer numbers have continued to be high. DAS has helped 1,248 customers during the last year and has won 92% of the appeals undertaken.

We have come to the end of the second year of our Big Lottery funding and have continued to achieve excellent results. through our manager, staff and volunteers at the DAS head and outreach offices.

We have continued to hold workshops as part of building capabilities and I would like to thank the staff, volunteers and trustees who took part in these.

I would also like to thank the MS Society, the Financial Inclusion and Advice Team (FIAS), Housing Options, CABs and many many more 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.

I would also like to include a special mention to Margaret Shaw, her support of DAS this year was greatly appreciated by everyone for all her time and hard work.

Robin Stroud and Grahame Tinnion have also given unstintingly of their time and effort to ensure the work of DAS continues, so special thanks to them as well.

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

I have completed this report as Vice Chairman of the Trustees as we are actively seeking a new Chairperson to lead the organisation.

A handwritten signature in black ink, appearing to read 'Roy Gilmour', with a stylized flourish at the end.

Roy Gilmour
Vice Chair

Manager's Report

Joe Crabbe , Lottery Grants Officer said:

"It is a testament to you, your staff and volunteers that you have overcome the hurdles you have faced to deliver" on the rural outreach project.

During 2019 we were able to achieve the outcomes we had said we would deliver during the second year of our successful bid for Lottery funding and to maintain our core service.

We have improved the skills of our volunteer advisers and are able to offer appointments in two weeks. Our paid staff have organised training and given encouragement and on going training - and we learn so much from our clients. We are working on reducing the time we take to answer client's messages and meeting the time limits for registering appeals for clients.

Thanks to our clients for responding to our surveys - we now know that we have helped lessen anxiety, and improve financial well being and reduce the feeling of being alone with problems.

We have been able to provide a service at the location of the client's choice. We are able to offer appointments in Saxmundham at The Old Police Station. We have a recruitment programme to recruit volunteers to increase this service, our home visiting service and essential administrative support at our office in Martlesham. We have a training programme in place which gives our volunteers confidence and transferable skills. Our volunteers report that working for DAS gives them satisfaction as they feel part of being included with a valuable service.

We have been able to give intensive support to people who were at crisis point because of lack of benefits to which they are entitled- their homes and health being at risk. We negotiate for immediate help and then help people acquire some of the skills and knowledge they need to avoid the situation in the future.

The support from IT and administrative staff and volunteers has been essential to help us keep improving the quality of service to our clients. The instant and positive response to our requests for help has meant an increase in the numbers of hours these volunteers give to DAS.

This year we have tried to diversify our income stream and the manager was involved in tendering for contracts to provide services. We have been successful with grant applications made by our volunteer fundraiser but it is our local support that has been essential to keep DAS funded.

Our thanks to Suffolk County Council, Suffolk Coastal District Council and Parish Councils and The Rope Trust who have recognized our valuable contribution to helping them provide services effectively and economically. Donations from clients and local supporters have meant that we were able to fund DAS this year with financial support from our reserves.

Robin Stroud and Grahame Tinnion have worked tirelessly this year to manage DAS, seeking expert help where needed. We have recruited two new Trustees who are committed to helping us in the challenging year ahead.

Margaret Shaw

Temporary Relief Manager

Treasurers Report

I present the statement of financial activities and balance sheet I have prepared for the year ending 31 December 2019.

The period has seen continued high activity and I have to report that we finished the year with a £10,595 surplus. We had an income of just under £154K and this has been achieved by the hard work in attracting donations, grants including the Big Lottery and fundraising. This leaves us with a final bank balance of £76,381.

In line with our financial policies all of this is our reserves fund and includes £2,000 restricted funds.

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 2020

Disability Advice Service East Suffolk
Registered Charity No CIO NO 1152772

Balance sheet as at 31st December 2019
for the period Jan-Dec 2019

2018		2019	2018		2019
	Activity	Jan-Dec	Apr-Dec	Assets	Jan-Dec
		£	£		£
	Cash	1,275	1,275	Cash	458
	Current Ac	14,552	14,552	Current Ac	6,764
	CCLA	29,330	29,330	CCLA	29,512
		20,629	20,629	Deposit	39,647
	Def/Surp	10,595			
			65,786		76,381
			49,427	Reserves	74,381
			16,359	Restricted	2,000
			0	Unrestrt'd	0
			65,786		76,381

Note as the £1,362 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

Roy Gilmour
Vice Chair




Daniel Jennings Chartered Accountant
Independent Examiner

Jan Leuz

Disability Advice Service (East Suffolk)
Statement of financial Activities for the year ending 31st December 2019

Balance sheet as at 31st December 2019
for the period Jan-Dec 2019

Disability Advice Service (East Suffolk) CIO no. 1152772
Statement of financial Activities for the year ending 31st December 2019

INCOMING	Unrestricted	Restricted	Total
	£	£	£
Donations	8,910		8,910
Grants	44,385	111,270	155,655
Fund raising			
Interest	201		201
Rent	32		32
TOTAL	53,528	111,270	164,798
EXPENDED			
Events	396		396
Advice Services	42,537	111,270	153,807
TOTAL	42,933	111,270	154,203
NET			
GAINS/LOSSES	10,595	0	10,595
NET MOVEMENT			
IN FUNDS	10,595	0	10,595
RECONCILIATION			
OF FUNDS			
Funds brought forward	46,749	19,037	65,786
Funds carried forward	74,381	2,000	76,381
FUNDS OF THE CHARITY			
Cash	458		458
Current account	4,764	2,000	6,764
CCLA	29,512		29,512
Deposit account	39,647		39,647
TOTAL	74,381	2,000	76,381

Note. As the £1,362 held in the current account for the Coastal Forum is not DAS funds these have been excluded from all calculations

Signed

Robin Stroud

Hon. Treasurer

Date 11/1/2020

Signed

Roy Gilmour

Vice Chair

Date

Signed

Daniel Jennings. Chartered Accountant

Independent Examiner

Date 08/02/2020

Disability Advice Service East Suffolk
Accounts for the Period 1st January to 31 December 2019

GENERAL ACCOUNT 2019

2018	Expenditure	2019	2018	Income	2019
		JAN-DEC	APR-DEC		JAN-DEC
96,508	Salaries/HMRC/pension/OH	95,878	31,206	SCC	30,500
50	Recruitment	165	3,997	MS Society	3,997
17,629	Rent & service charges	21,351	5,600	Donations	8,910
4,552	Travel	3,438	164	CCLA interest	182
1,344	Training	3,995	974	Fund raising	0
2,238	Telephone & Internet	2543	10,318	SCDC	1106
509	Postage	498	11	Lloyds interest	19
1,244	Stationery	749	4,000	Grants restricted	4,300
2,379	Insurance	2,367	9,750	Grants Unrestricted	12,460
254	Publicity	59	3,124	Town & Parish Councils	1,425
64	Refreshments	52	87,185	Big Lottery	97,461
1,152	Books/Publications/Subs	1,177	15,000	BL Building capacity	0
872	Fees/AGM/Gifts	845		Rent income	32
7,418	Office equipment	4,148			
1,102	Cleaning	1,040			
1,562	Fund raising costs	396			
572	Legal/DBS/Licenses	1,242			
3,146	Utilities	3,098			
5,449	Development /Build Capacity 5,624	6,520			
		149,561			160,392
6,491	Client grants	4,642	6,477	Client Grants	4,406
154,535	SUB TOTAL	154,203			
23,271	DEFICIT/SURPLUS	10,595			
177,806	TOTAL	164,798	177,806		164,798

Grants and Donations 1 January – 31 December 2019

Local Authority grants	£
PC Blaxhall	£20
PC Cookley & Walpole	£25
PC Farnham & Stratford St Andrew	£50
PC Friston	£50
PC Grundisburgh & Culpho	£50
PC Little Glemham	£30
PC Peasenhall	£150
PC Wickham Market	£50
Suffolk County Council Locality Budgets	£800
Suffolk County Council	£30,500
TC Saxmundham	£1,000
TC Woodbridge	£1,000
Total	£33,695

Other Major Grants and Donations

Organisation	£
Alchemy Charitable Trust	£750
Ann Potter Memorial Trust	£280
Annie Tranmer Charitable Trust	£1,000
The Big Lottery	£97,461
Borrows Charitable Trust	£1,000
Cranfield Charitable Trust, 1971	£250
E Alec Colman Charitable Fund Ltd	£280
Ganzoni Charitable Trust	£1,000
Mazars	£500
MS Society	£3,996
Ogilvie Trust	£500
SCC Councillors Locality Budget	£800
Scarfe Charitable Trust	£900
Simon Gibson Charitable Trust	£3,000
Stanford Community Trust	£1,000
Suffolk Community Foundation Pargiter Trust	£2,000
The Alchemy Foundation	£750
The Fitton Trust	£250
The Lord Belstead Charitable Trust	£2,000
Woodroffe Benton Foundation	£750
Total	£118,467



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

**Independent examiner's
report on the accounts**

Section A

Independent Examiner's Report

**Report to the trustees/
members of**

DISABILITY ADVICE SERVICE (EAST SUFFOLK)

**On accounts for the year
ended**

31st December 2019

**Charity no
(if any)**

1152772

Set out on pages

1

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 12 2019.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn 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:

Daniel Jennings

Date:

08/02/2020

Name:

DANIEL JENNINGS

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

ACA (ICAEW)

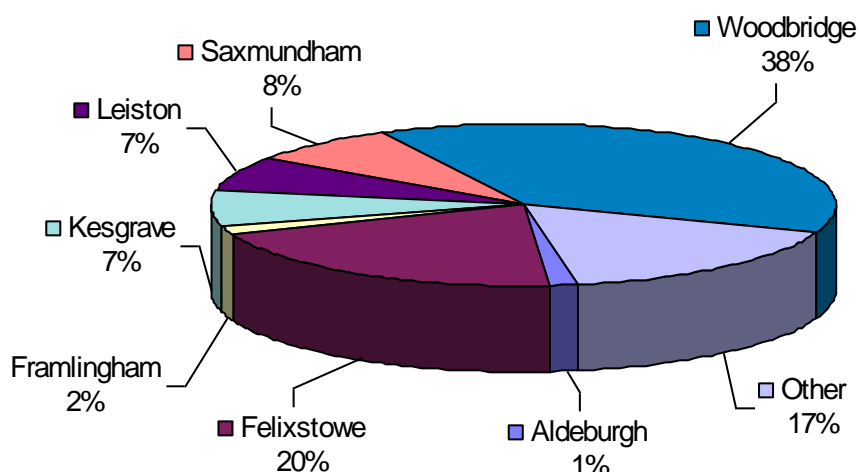
Address:

9 CAULDWELL AVENUE
IPSWICH SUFFOLK
IP4 4EB

Benefit	Gain £
Appeals	£564,629
Attendance Allowance	£127,065
Carers Allowance	£19,562
Council Tax Benefit	£57
Disability Living Allowance	£74,682
Employment Support Allowance	£520,995
Housing Benefit	£505
Pension Credit	£1,296
Personal Independence Payment	£1,124,660
Universal Credit	£26,979
All Client Grants and Emergency Food Parcels	£12,528
Unspecified	£8,880
Total	£2,481,838

The total benefit awarded to clients as a result of our work this year was approximately £2,481,838 highlighting the essential need for our service in the East Suffolk Coastal area.

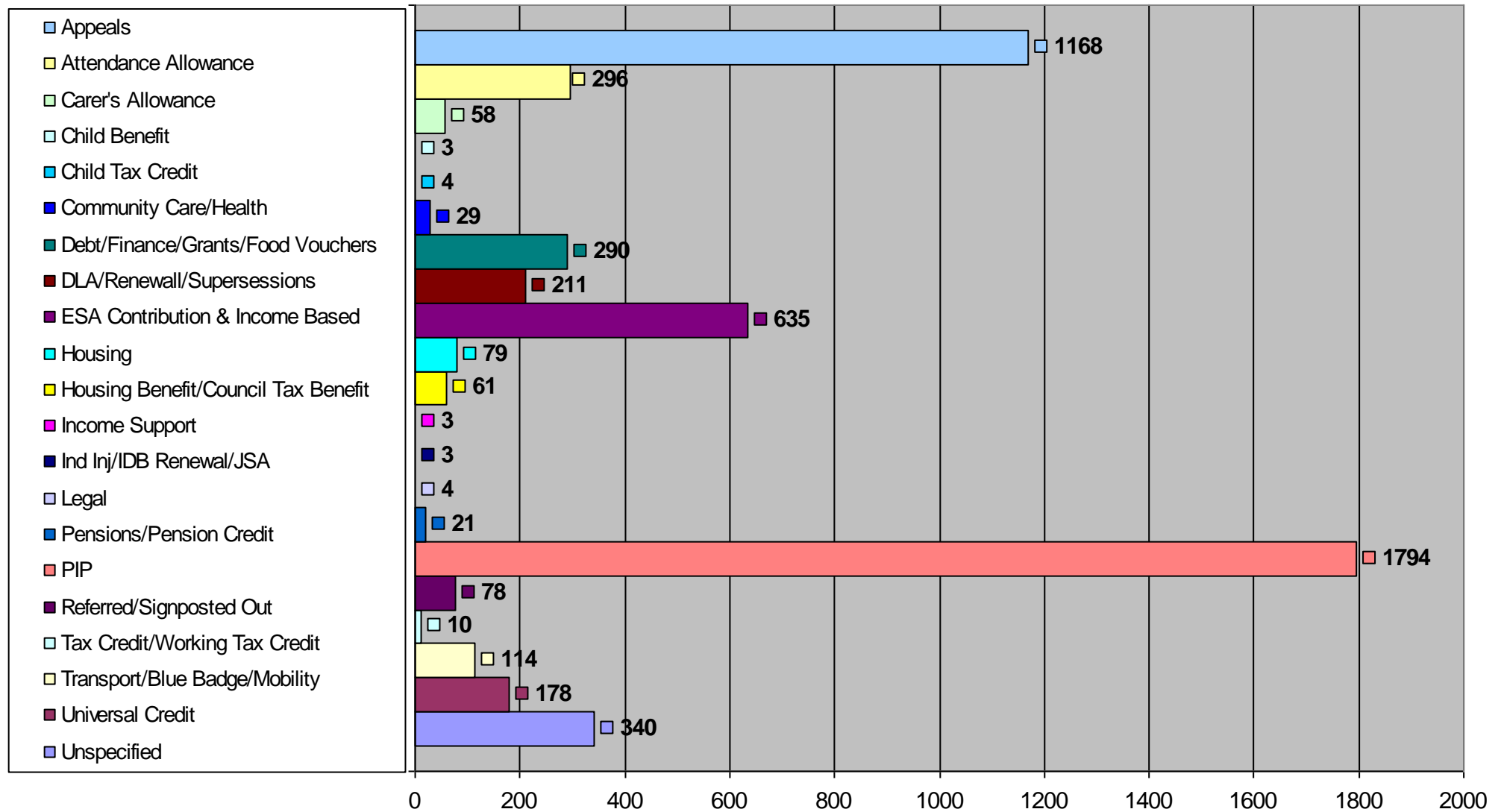
Enquiries by Town and Area



Financial Gain by Area: 1 January 2019 – 31 December 2019

Area	Gain £
Aldeburgh	£38,827
Felixstowe	£547,258
Framlingham	£59,441
Ipswich Area	£361,513
Kesgrave	£188,229
Leiston	£185,294
Saxmundham	£256,399
Woodbridge	£800,853
Other	£44,024
Total	£2,481,838

Enquiries By Category 2019



Clients = 1,248
Enquiries = 5,379

Disability Advice Service (East Suffolk)

Helping people of all ages

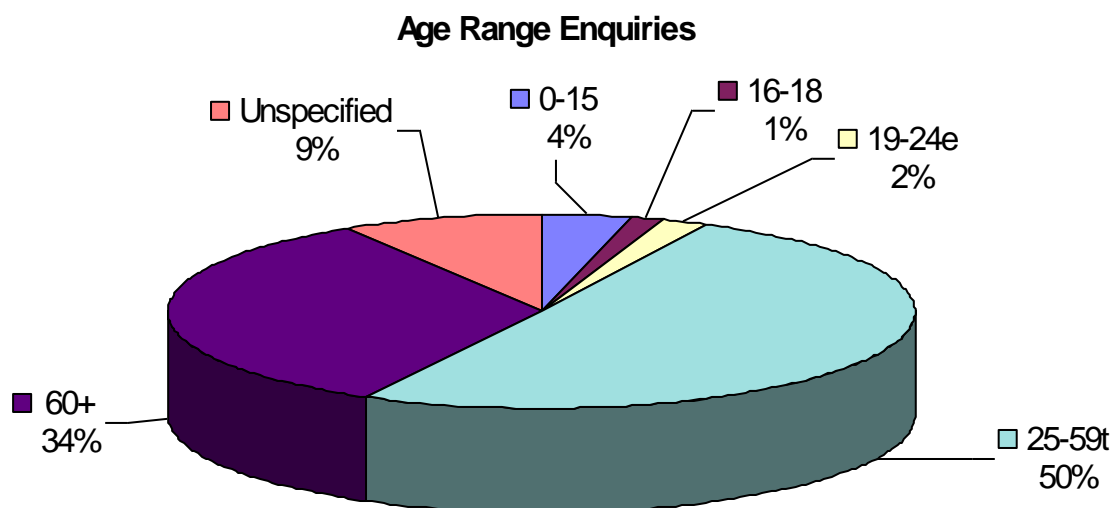
DAS is an independent advice service and specialises in issues relating to disabled people and their carers. We are based in Martlesham Heath, but we offer free help and advice to people over much of the Suffolk Coastal district.

The 6,058 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 felt I was dealt with in an extremely sensitive and caring manner, which helped to put me at ease, so I thank you for that.
- I feel D.A.S. is a service that people should be made aware of because the need is out there and the help is invaluable.
- I was treated so well, as a human being, by the advisor that helped me to verbalise my concerns so much better than I thought I would be able to. I was very relieved to have this help and was very happy with the way I was guided through the whole process.
- We are so lucky to have this facility. I get very stressed, but how quickly you make me feel at ease. Thank you, I would never be able to fill in these forms with out your wonderful help.
- Excellent organisation – we have used them 3 times now. I don't know how I would manage my son's benefit application without DAS's help – certainly I would have struggled.
- Excellent service provided cheerful demeanor made a horrible time/Form much easier to understand and fill in. Thankyou.
- Very friendly and understanding they listened to all I had to say and treated me with respect.
- Very calming as I was very anxious. The lady that helped me fill out a form was very helpful and caring. She took her time to try to make me at ease as I am very anxious. Nothing was too much for her and the offer of drinks was a great help. I never felt rushed and found the whole time I was here not as much of an ordeal as I was expecting. So therefore all my comment over the page are excellent, and I will definitely be recommending anybody, if asked, that DAS are very helpful and really worth a visit.
- The D.A.S are an excellent service and I am totally grateful to everyone that helps out there for the help and support!

Grants/donations awarded

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

Alchemy Charitable Trust
Ann Potter Memorial Trust
Annie Tranmer Charitable Trust
The Big Lottery
Borrows Charitable Trust
Cranfield Charitable Trust, 1971
E Alec Colman Charitable Fund Ltd
Ganzoni Charitable Trust
Mazars
MS Society
Ogilvie Trust
TC Saxmundham
TC Woodbridge
Suffolk County Council
SCC Councillors Locality Budget
Scarfe Charitable Trust
Simon Gibson Charitable Trust
Stanford Community Trust
Suffolk Community Foundation Pargiter Trust
The Alchemy Foundation
The Fitton Trust
The Lord Belstead Charitable Trust
Woodroffe Benton Foundation
The Rope Charitable Trust (Client Grants)

**And all the towns 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.**