

Disability Advice Service (East Suffolk)

Annual Report and Accounts

1 January 2018 – 31 December 2018

CIO Charity Number: 1152772

www.daseastsuffolk.org.uk



Highlights 1 January – 31 December 2018

- This is the **34th 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 **£2,053,424** in benefits.
- We have advised **1,229 Clients**
- We have dealt with **6,058 Enquiries**.
- We **won 68 of the 81 appeals cases** where a decision was reached (**84%**) and dealt with a massive **218** appeals throughout the year! Approximately **50** cases have been carried over to 2019.
- We were awarded **£301,210 over three years** by the National Lottery through the Big Lottery Fund.
- We **gave £5,389** as small grants to individuals.
- We continued our partnership with the **Multiple Sclerosis Society** to deliver advice to their members across our area.
- We developed our **outreach services** to Leiston and Felixstowe and plan similar services for Saxmundham
- We worked with 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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Management Committee Trustees

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

Jo Cowley
Andy Simpson
Jean Gooch
Janet Garfield
Abigail Osborne
Carrie Wright

Associate member

Amanda Strowger

Suffolk Coastal District Council representatives

Cllr Mark Amos
Cllr Doreen Savage

Teresa Rose, Independent Examiner

Paid Staff

Jenny Morcom, Manager (to 4th July 2018)
Dan Bristow Manager (From 1st September 2018)
Caroline Goldsmith, Senior Welfare Rights Adviser
Colin Williamson, Administration & Fundraising Officer
Jo Bowen, Welfare Rights Officer
Donna Keenan, Volunteer Co-Ordinator
Tracey Haynes, Crisis Intervention Officer

Volunteers

Anne Barnes
Simon Shaw
Louise Liddell
Donna Frankis
Dee Woolnough
Brendan McArdle
Alan Parsons
Ruth Sparks
Sue Spencer
Julie Duxbury
Karen Day
Tim Jebb
Mike Rushmore
Lee Wickiewicz

Kylie Burness
Elle Perry
Joyce Robinson
Roz McSweeney
Margaret Shaw
Liz Warden
Sue MacGregor
Amanda Jones
Roy Gilmour
Andy Girling
Tony Nunn
Jemma Davidson
Margaret Harper

Chairs Report: Stella Morris

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 - Jo Cowley and Andy Simpson.

Staff - Jen Morcom (Manager) Jess Hargrave (Adviser) and Theresa Fairweather (Adviser covering maternity leave)

Long term volunteers - Margaret Shaw (Adviser) Brendan McArdle (Client Fundraiser) and Sue MacGregor (Administration Assistant)

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

Special thanks go to Jen for all her hard work in obtaining the Big Lottery funding which has enabled us to give our volunteers the support they deserve.

As well as having a new Manager, Dan Bristow, we have welcomed the following members of staff into newly created positions at DAS: Donna Keenan (Volunteer Co-ordinator) Jo Bowen (Outreach Advisor and Telephone Adviser) and Tracey Haynes (Crisis Intervention Officer)

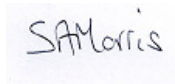
During this time of change customer numbers have continued to be high. DAS has helped 1,229 customers during the last year and has won 84% of the appeals undertaken. We have also added crisis support to the areas we cover to enable customers to have financial support while waiting for benefit decisions.

We have come to the end of the first year of our Big Lottery funding and our Volunteer Co-ordinator is achieving excellent results. In addition to the excellent work our advisors do at the DAS office; our Outreach Worker/Telephone Adviser has enabled our customers to access our support either closer to home, or with greater ease. The crisis work we have undertaken with our new Crisis Intervention Officer has helped our more vulnerable clients enormously.

We have held workshops as part of building capabilities and I would like to thank the staff, volunteers and trustees who took part in these. Unfortunately our Customer Forum has not met for most of this year but plans are being put in place to revive this.

I would also like to thank our partners, the MS Society, Home Group, Suffolk Disability Advice Services (SDAS), 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.

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.

A handwritten signature in blue ink that reads "Stella Morris". The signature is written in a cursive style with a small dot above the 'i' in Morris.

Stella Morris Chair

Managers Report: Dan Bristow

I was appointed permanent manager in September 2018 and I have been pleased to have been welcomed into the DAS 'family'. I hope this is the first of many reports I contribute to the annual report. I would first like to pay tribute to my predecessor, Jen Morcom, for developing the service over the past eight years and securing the immediate future of DAS with a grant from the Big Lottery. The work involved in applying for, and securing, Big Lottery funds should not be underestimated and Jen deserves considerable praise for the enormous amount of work she did to ensure this was successful.

One of my tasks is to build on Jen's work to secure DAS' viability over the longer term and to ensure that DAS is able to help our customers achieve the outcomes they want to. There are challenges ahead for DAS but the real challenges are faced by disabled people who continue to experience direct and indirect discrimination on a daily basis and who are over-represented in statistics relating to unemployment and poverty.

The funding landscape has changed considerably for charities in recent times. Public confidence in charities has been dented by scandals in high-profile charities resulting in a drop in donations, and government austerity measures have meant that local authorities have had to reduce, or stop altogether, their financial support for advice and support charities.

Against this background, DAS is extremely grateful for the continued support from a number of organisations including Suffolk County Council, the Ropes Trust, the MS Society, Suffolk Coastal District Council, and district and parish councillors.

We are also always very appreciative of the generous donations we receive from our customers. Our customers are, mostly, people who rely on income from disability benefits so to receive anything from people with limited means is always humbling. The donations are not always in the form of money – we often get tea, coffee, cakes, biscuits – all the essentials to keep a modern office working productively!

I have worked in the charitable sector since 1992, managing services for vulnerable people including offenders, homeless people and family carers. I can say, hand on heart, that I have been astonished by the commitment, passion, knowledge and experience of the staff team here at DAS, especially those who volunteer.

DAS has a remarkable team of volunteers, some of whom are disabled people themselves, who give many hours of their free time to give advice to DAS' customers. To reach the high standard that DAS expects of its advice team, this also means considerable time spent on training courses and shadowing experienced colleagues. I am grateful to those experienced advisers for their role in bringing on their new colleagues.

I would also like to recognise and thank those volunteers who have moved on in 2018 after years of valuable service to DAS. Brendan McArdle served DAS as a volunteer and a trustee for 15 years; Margaret Shaw, who managed DAS for 4 years from 1997 and who returned in 2009 to volunteer for a further 9 years; Sue MacGregor volunteered for 4 years before returning to paid work in her local community. All of these wonderful people are greatly missed.

It is a privilege to lead such a great service and I will work hard to ensure that DAS goes from strength to strength in 2019 and the years to come.

A handwritten signature in black ink, appearing to read 'Dan Bristow', followed by a vertical line.

Dan Bristow
Manager

Treasurers Report: Robin Stroud

I present the statement of financial activities and balance sheet I have prepared for the year ending 31 December 2018.

The period has seen continued high activity and I have to report that we finished the nine months with a £23,271 surplus. We had an income of just under £178,000 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 £65,786. In line with our financial policies all of this is our reserves fund and includes £16,359 restricted funds.

During my time as Treasurer I continue to be very impressed by 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.

A special thanks to Sarah Grieveson for her work in fundraising and also Emma Webb for auditing the accounts.



Robin Stroud
February 2019

Disability Advice Service (East Suffolk) CIO no. 1152772
Statement of financial Activities for the year ending 31st December 2018

INCOMING	Unrestricted	Restricted	Total
	£	£	£
Donations	5,600		5,600
Grants	48,395	122,662	171,057
Fund raising	974		974
Interest	175		175
TOTAL	55,144	122,662	177,806
EXPENDED			
Events	1,562	105,805	107,367
Advice Services	47,168		47,168
TOTAL	48,730	105,805	154,535
NET			
GAINS/LOSSES	6,414	16,857	23,271
NET MOVEMENT			
IN FUNDS	6,414	16,857	23,271
RECONCILIATION			
OF FUNDS			
Funds brought forward	40,335	2,180	42,515
Funds carried forward	46,749	19,037	65,786
FUNDS OF THE CHARITY			
Cash	1,275		1,275
Current account	14,552		14,552
CCLA	6,059	23,271	29,330
Deposit account	20,629		20,629
TOTAL	42,515	23,271	65,786

Note. As the £520 held in the current account for the Coastal Forum is not DAS funds these have been excluded from all calculations

Signed *A.E. Stroud*
Robin Stroud
Hon. Treasurer
Date 11/3/19

Signed *SAMATIS*
Stella Morris
Chair of the Charity
Date 11/3/19

Signed *Emma Webb*
Emma Webb
Independent Examiner
Date 09/03/2019

Disability Advice Service (East Suffolk)

Accounts for the period 1st January to 31st December 2018

GENERAL ACCOUNT

2017 APR-DEC	2018 JAN-DEC	2017 APR-DEC	2018 JAN - DEC
EXPENDITURE		INCOME	
45,600 Salaries/HMRC/pension	96,508	31,206 SCC	31,206
34 Recruitment	50	1,998 MS Society	3,997
12,839 Rent & service charges	17,629	2,648 Donations	5,600
2,158 Travel	4,552	83 CCLA interest	164
374 Training	1,344	1,068 Fund raising	974
1,622 Telephone & internet	2,238	2,000 SCDC	10,318
476 Postage	509	Lloyds interest	11
338 Stationery	1,244	8,000 Grants restricted	4,000
270 Insurance	2,379	1,000 Grants unrestricted	9,750
20 Publicity	254	2,350 Town & Parish Councils	3,124
113 Refreshments	64	Big Lottery	87,185
1,213 Books/Publications/Subs	1,152	BL Building capacity	15,000
280 Fees/AGM/Gifts	872	Sub total	171,329
2,098 Office equipment	7,418		
828 Cleaning	1,102		
146 Fund raising costs	1,562		
109 Legal/DBS/Licenses	572		
1,688 Utilities	3,146		
1,844 Client grants	6,491	1,510 Client Grants	6,477
135 Development/Building Capacity	5,449		
72,185 SUB TOTAL	154,535		
-20,322 DEFICIT/SURPLUS	23,271		
£51,863 TOTAL	177,806	£51,863	177,806

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 year
ended

31st December 2018

Charity no
(if any)

1152772

Set out on pages

1

(remember to include the page numbers of additional sheets)

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.

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.

Independent
examiner's statement

In connection with my examination, no matter has come to my attention.

1. which gives me reasonable cause to believe that in, any material respect, the requirements:
 - to keep accounting records in accordance with section 130 of the Charities Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

Emma Webb

Date:

06/03/2019

Name:

Emma Webb.

Grants and Donations 1 January – 31 December 2018

Local Authority grants	£
Aldringham Parish Council	100
Blaxhall Parish Council	20
Campsea Ashe Parish Council	50
Cookley and Walpole Parish Council	25
Grundisburgh and Culpho Parish Council	50
Little Glemham Parish Council	30
Kirton and Falkenham Parish Council	100
Friston Parish Council	100
Otley Parish Council	100
Peasenhall Parish Council	125
Marlesford Parish Council	20
Suffolk Coastal District Council	9,618
Snape Parish Council	100
Suffolk County Council	31,206
Sutton Parish Council	50
Trimley St Martin Parish Council	100
Wickham Market Parish Council	50
Wenhaston Parish Council	54
Woodbridge Town Council	1,000
Total	42,898

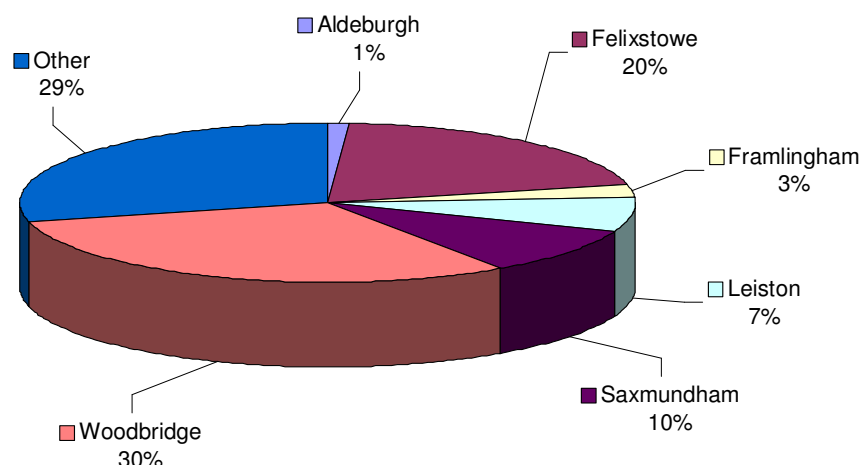
Other Major Grants and Donations

Organisation	£
ASDA	200
Albert Hunt Trust	2,000
Alchemy Foundation	750
Annie Tranmer Trust	1,000
Bailey Thomas Charitable Fund	4,000
Benhall and Sternfield Womens Fellowship	250
Borrows Charitable Trust	500
Cranfield Trust	250
Dunwich Town Trust	1,000
Fitton Trust	250
Lord Belstead Charitable Settlement	2,000
Mid Suffolk Labour Party	200
MS Society	3,996.72
Persula Foundation	2,000
Roger Vere Foundation	600
Orford Town Trust	50
TA Hotel Collection Limited from Hotel Guests	1,979.95
Total	21,026.67

Benefit	Gain £
Appeals	£513,156
Attendance Allowance	£138,004
Carers Allowance	£17,339
Disability Living Allowance	£84,282
Employment Support Allowance	£366,039
Housing Benefit	£5,727
Income Support	£4,798
Industrial Injuries	£12,935
Personal Independence Payment	£908,765
Unspecified	£2,379
Total	£2,053,424

The total benefit awarded to clients as a result of our work this year was approximately £2,053,424 highlighting the essential need for our service in the East Suffolk Coastal area.

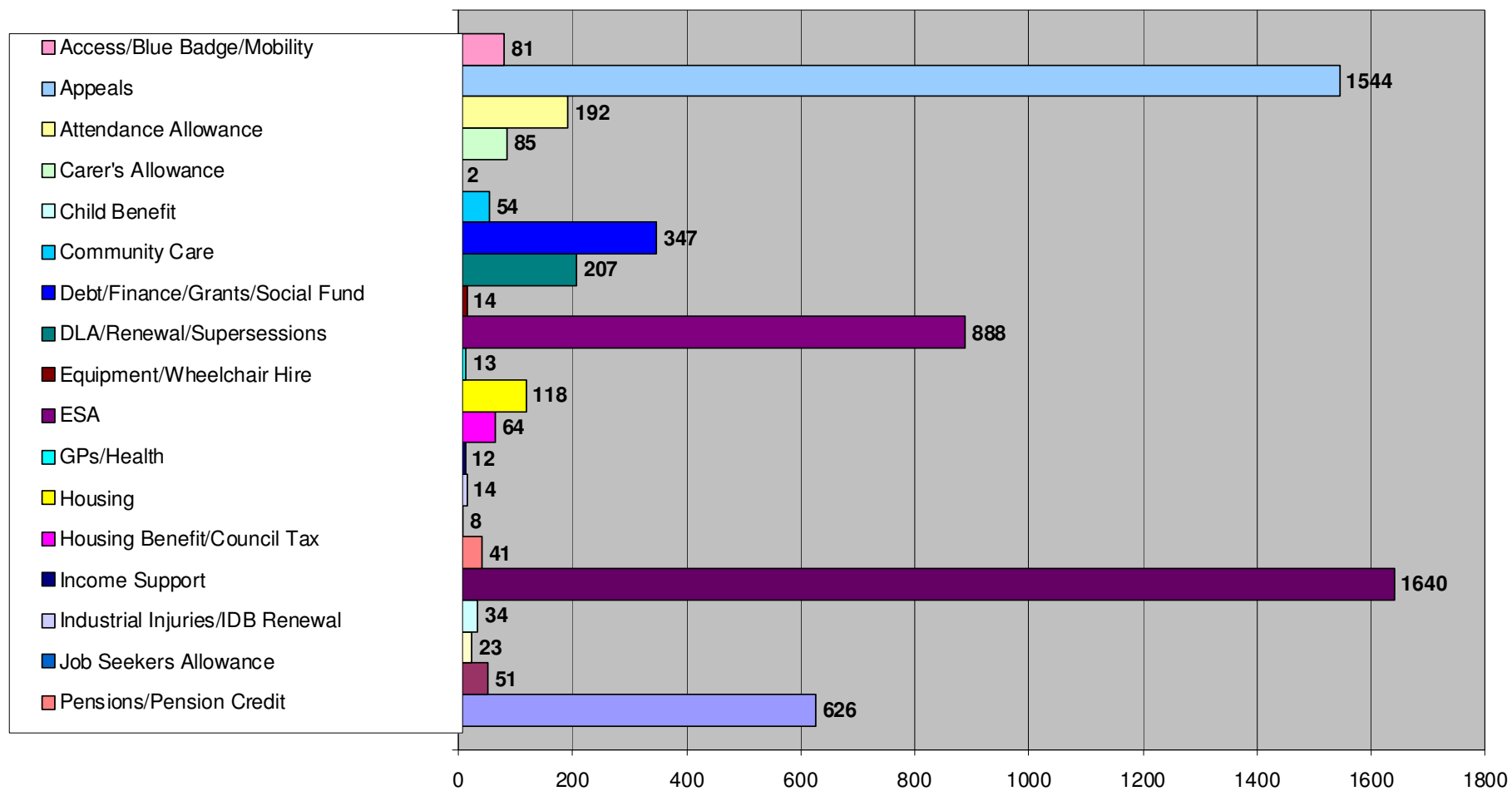
Enquiries by Town and Surrounding Area



Financial Gain by Area: 1 January 2018 – 31 December 2018

Area	Gain £
Aldeburgh	£15,417
Felixstowe	£434,497
Framlingham	£20,293
Greater Ipswich & Kesgrave	£490,302
Leiston	£180,828
Saxmundham	£159,140
Woodbridge	£709,681
Other	£43,266
Total	£2,053,424

Enquiries by Category 2018



Clients = 1,229
Enquiries = 6,058

Disability Advice Service (East Suffolk)

Helping people of all ages

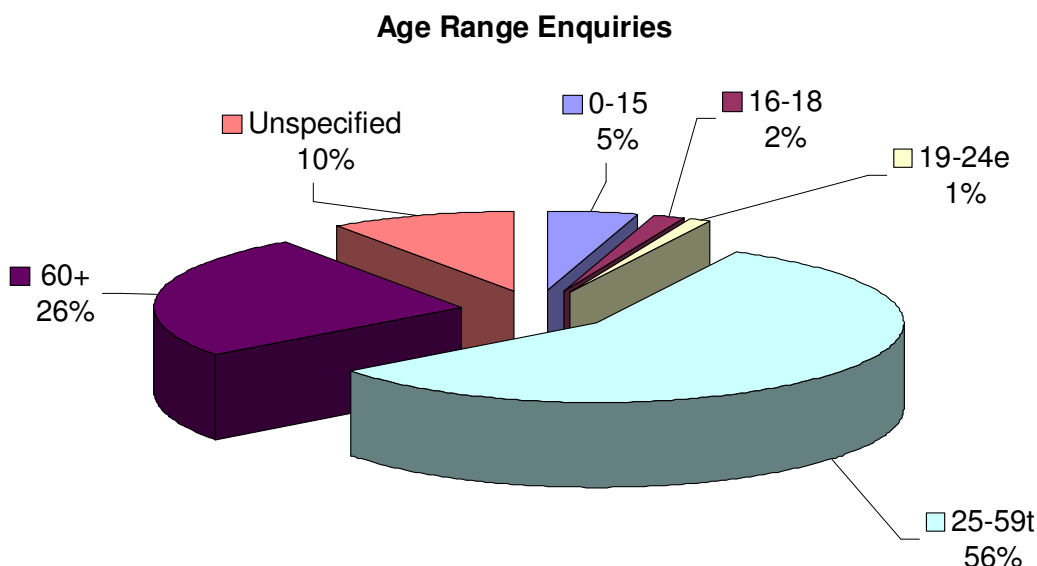
DAS is an independent advice service and specialises in issues relating to disabled people and their carers. We are based in Martlesham Heath, but we offer free help and advice to people over much of the Suffolk Coastal district.

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:

- “The Government should fund these places because they give the most honest support and help.”
- “This is a very important service that all people with disabilities find crucial”
- “The lady that came out to me was very professional, she was patient, she listened to what I would say , she explained everything to me.”
- “I was very pleased to find out about this service and would highly recommend it to anyone who I thought would Find as useful as myself. Excellent informative service..”
- “I have found everyone to be caring and very understanding”
- “Change-over from DLA, unsure I would have retained “enhanced benefit” without your help!”
- “Helpful, kind and efficient”
- “Have recommended DAS to others”
- “Very helpful and we learnt a lot .”
- “Warm, friendly Really Really excellent made me feel comfortable & at ease”
- “Very helpful & completed form in detail.”
- “So very kind and considerate to my situation. Many thanks.”
- “Thank Goodness you are still here!”
- “Very understanding, empathetic and caring.”

Grants/donations awarded

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

- Alchemy Trust
- Annie Tranmer Trust
- Albert Hunt Trust
- Borrows Charitable Trust
- Benhall and Sternfield Womens Fellowship
- Dunwich Town Trust
- Cranfield Trust
- Fitton Trust
- Lord Belstead Charitable Settlement
- Mid Suffolk Labour Party
- Multiple Sclerosis Society
- Persula Foundation
- Roger Vere Foundation
- Woodbridge Town Council
- Suffolk Coastal District Council
- Suffolk County Council
- TA Hotel Collection Ltd

**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.**