

1. Activity and outcomes monitoring

Please refer to the Action Plan you provided in your project proposal form and provide an update. If activities have changed, please provide a brief explanation.

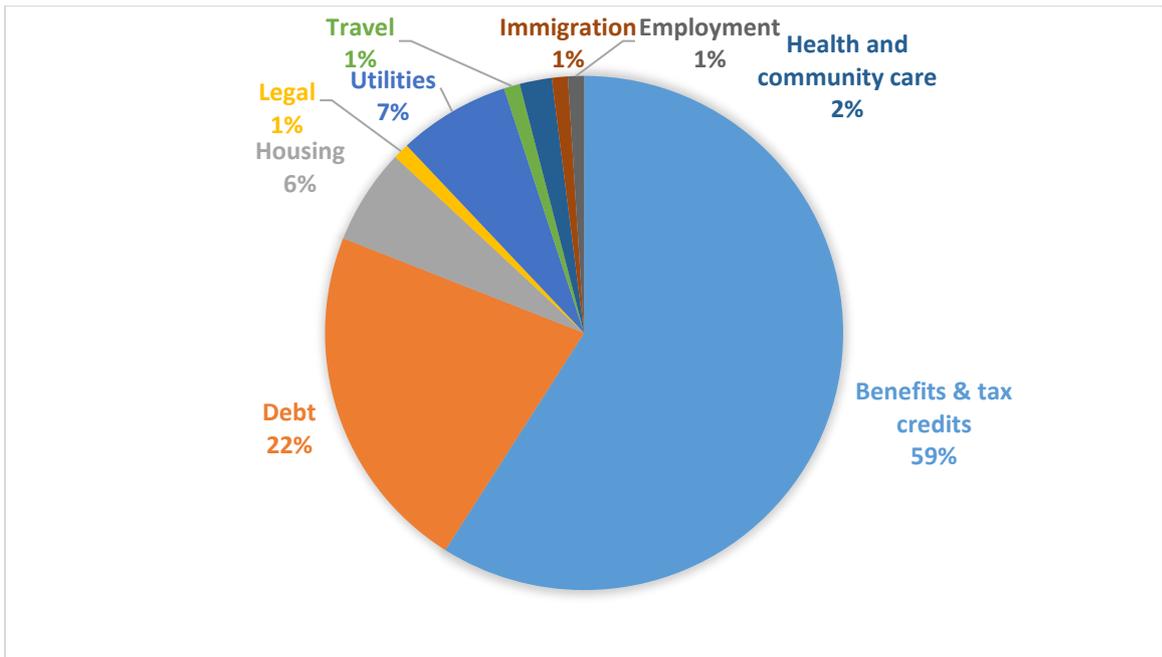
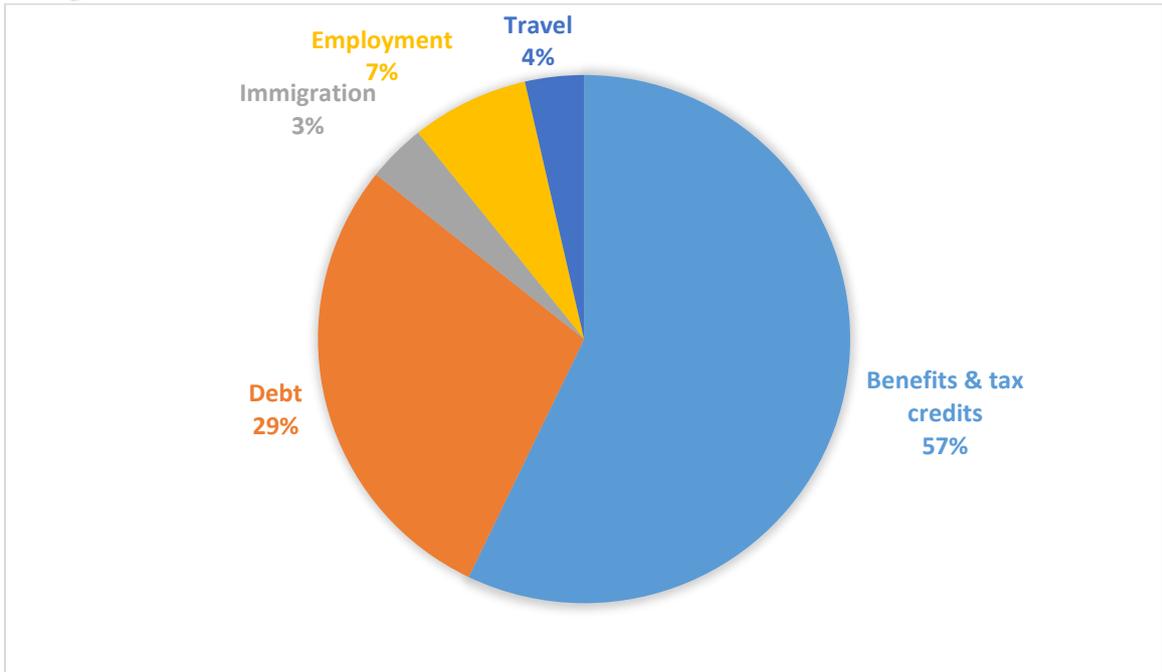
| Actions / activities – what has been delivered? (Please include the week/month of the activity) | Reason for any changes, if applicable | Number that participated or benefited. (Include details of any key communities.) |
|---|--|---|
| Outreach sessions at St Mary’s Parish Centre, East Finchley, including follow-up and casework on behalf of clients. | | 166 residents of East Finchley Ward |

| Outcome Use the Outcomes that were agreed in your project proposal form. | Progress Describe who is benefitting and what changes are happening? | Evidence of change Describe how you know the change is happening. |
|--|--|---|
| 150 appointments provided over the year | 28 appointments attended in this quarter (Oct-Dec 2017). An increasing number of the appointments given need to be double-length appointments because of the complexity (benefits appeals for example) which reduced the total number against target. | Cumulative figure for the project is 166. |
| £16,000 of financial outcomes for these clients, benefitting local economy. | There were £24,416 worth of financial outcomes (additional income) for clients, representing successful benefit claims and appeals and debt reconsideration in this quarter. | Cumulative figure for the project is £76,821. |

Client Demographics and additional information for Q2, Yr2 of the Project:

a) Issues Breakdown

For the period October - December 2017, the clients who attended Outreach sessions had the following breakdown of issues (the top chart shows Q2, Yr2 and the lower chart is cumulative over 18 months):



b) Resolution of cases

Cases resolved:

Q2 (Yr 2)

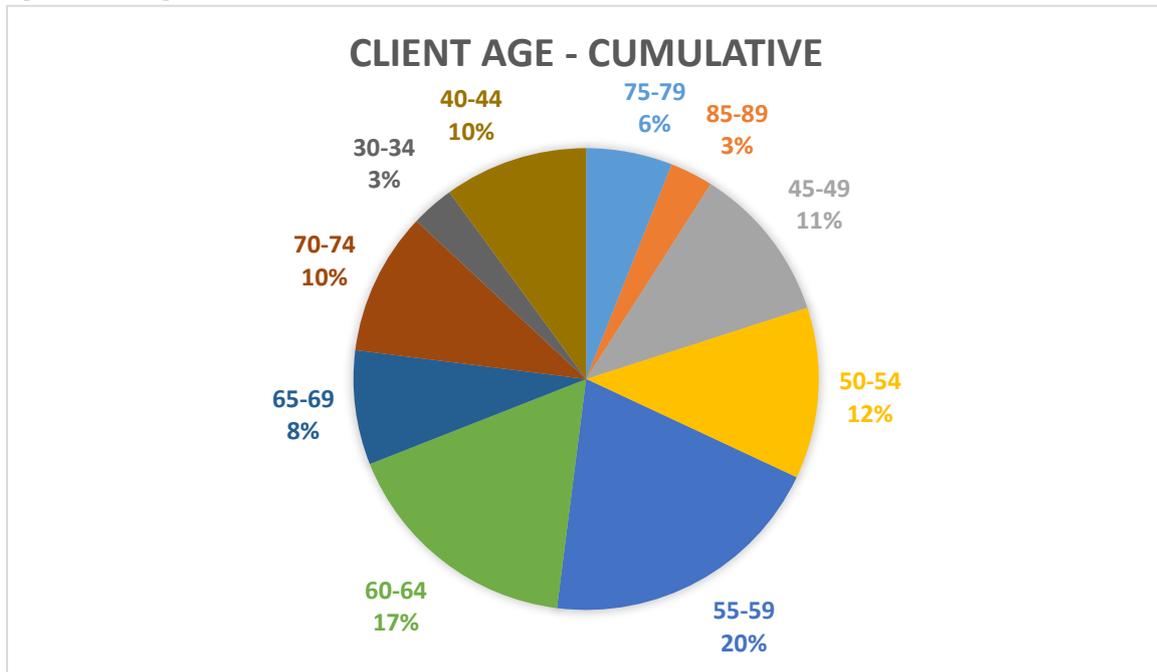
77%

Cumulative

83%

| | | |
|--|-----|-----|
| Cases Unresolved ¹ : | 5% | 6% |
| Cases awaiting resolution ² : | 18% | 12% |

c) Diversity Information

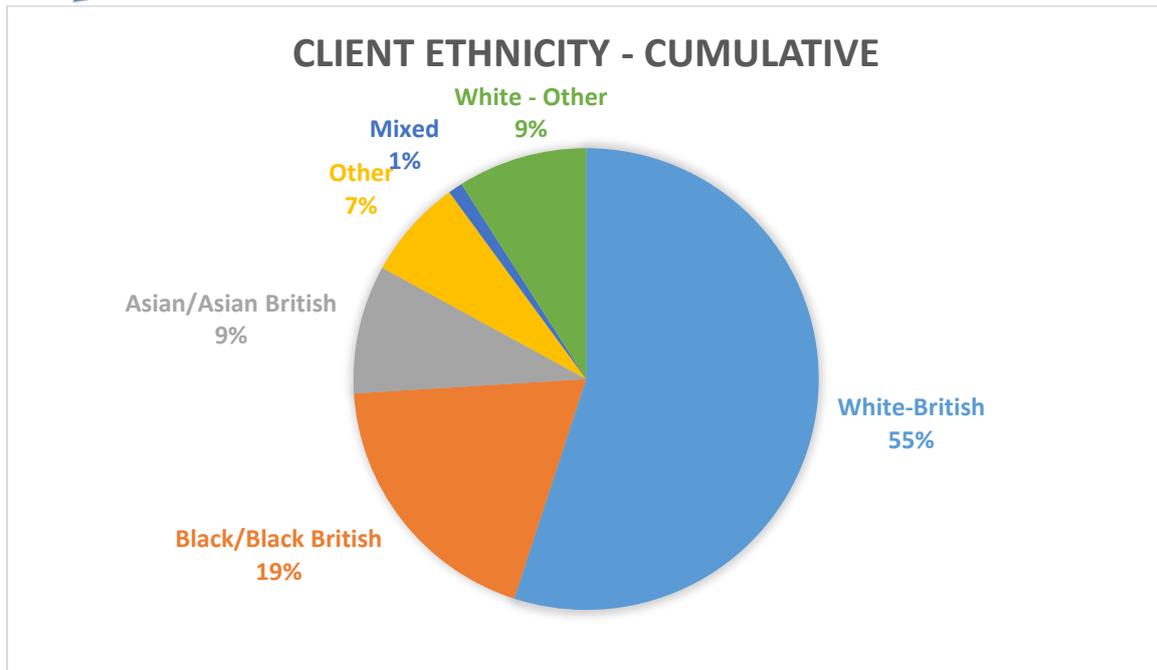


Cumulatively, 60% of clients were Female and 40% Male; and 76% of clients were disabled or suffering from a long-term health condition.

Cumulatively, 85% of clients have been from the GBL area, and 100% from East Finchley Ward.

¹ Cases where the client was advised but the situation could not be moved on. In this quarter one case was unresolved because the client did not meet the eligibility criteria for welfare benefits.

² This is where applications and interventions have been made on behalf of the client and an outcome is still awaited.



d) Feedback from clients

This has continued to be positive but the location of the Outreach continues to be problematic.

f) Case study

The client came for an appointment with letters from Her Majesty’s Revenue and Customs (HMRC) demanding repayment of over £8,500 in overpaid Tax Credits. This had arisen because her husband had recently joined her from Syria and she had not reported this to HMRC. She had not known she had to, thinking that only changes in income were reportable.

Our adviser contacted HMRC and requested a reconsideration of the decision based on the principle of ‘notional entitlement’. This offsets any overpaid amount against the amount that would have been received *if* the change in circumstances had been reported on time. HMRC never apply this rule automatically, and people must ask for it specifically. This is in practice unfair, as most people do not know about it.

This resulted in the overpaid amount being reduced to just over £2,000, which is now being recovered at a low monthly rate. The advice that the client received saved her from a debt which would have taken years to repay and alleviated her stress.

Daniel Bamford – February 2018