



FACT (Families and Carers Together) Bucks

**A Charitable Incorporated Organisation Registered in England Number 1155067
Registered Office PO Box 1230, Aylesbury, HP22 9UP**

TRUSTEES for the period 1st April 2024 to 31st March 2025

Ruth GOODMAN

Allison MILLIGAN (appointed 26/9/24; resigned 31/1/25)

Margaret RUTENDO NYAMBAYO

Governance and Administration

FACT Bucks is the Parent Carer Forum for Buckinghamshire, as required by the Children and Families Act 2014.

The objects of the Charity are to embed a local, pan disability, parent led parent/carer forum; build parent/carer participation/co-production based on good practice; and share good practice, knowledge and expertise about parent participation to ensure that it continues to grow and strengthen.

The Charity cannot undertake campaigns, pursue individual cases nor offer support and counselling to individual parent carers.

There are now 1804 families on our contact list. Whilst membership is open and free to all those with an interest in the needs of children and young people with SEND, there remains a reluctance to commit. Nevertheless, the Charity seeks to represent all parent carers; makes all its activities open to all parent carers; and accesses the networks of support groups. One of the trustees, appointed at the AGM, have resigned their office during the period. The Charity may have up to 12 trustees elected by the AGM (or coopted by the Trustees between meetings). Trustees must be members of the Charity.

Under the terms of the Trust, the Trustees have delegated away the day to day administration of the Charity to the Steering Group appointed by them.

The membership of the Steering Group for the period under review has been as follows:-

Rupali DEVKAR (Communications Officer)
Andrew HOWARD (Team Leader until 30/9/24) (Lead Rep PfA & Higher Needs)
Lucy JONES (Team Leader from 1/1/25)
Beth KNIGHTON (Participation Officer)
Phil OGLEY (Lead Rep Early Intervention & Sufficiency)
Sarah PATEL (Admin Officer)
Penni THORNE (Finance Officer)

The Steering Group aims to meet bi- monthly to manage the Charity; to co-ordinate parent participation; and to plan events. It also meets with parents who represent the Charity on various bodies; with professionals to facilitate dialogue and encourage co-production; and with representatives of Buckinghamshire Council SEND & Commissioning teams, as well as Bucks SENDIAS to ensure effective co-ordination of activities.

On behalf of the Trustees, the Steering Group maintained the charity; fulfilled the obligations of the grants received; and fulfilled the responsibilities of the employer.

The Charity is a member of the National Network of Parent Carer Forums. We attend regular meetings for our area, discussing various topics matters with other parent carer forums. The Charity provides financial administration for the South-East Region and continues to offer support to other forums.

Finance

In the year ending 31st March 2025, the Charity received grants from the Department of Education (through a scheme administered by Contact) and Buckinghamshire Council. Both grants are free from commitments to provide any specific services other than to fulfil the task of being the Parent Carer Forum for Buckinghamshire as required under the Children and Families Act. The Trustees will not allow the Charity to be influenced in the manner of its delivery of the Aims of the Charity by any third party. It did receive a payment from the South East Region of Parent Carer Forums in respect of its provision of a finance function and a specific grant was given by Integrated Care Board for the delivery of workshops in relation to ADHD. It did not undertake any fundraising.

The **total income** for the period was **£35,850**

During the year the Charity **expended £36,362**

The main items of expenditure were payments to parent carers for their time and expenses in participation and/or co-production; the administration of the Charity; training of parents to participate and the staging of certain events. The higher than usual expenditure was due to the costs relating to work on the ADHD project funded through a grant received in the preceding financial year and the appointment of a new Team Leader

The operating **deficit** for the year was **£512**

The Charity remains in a positive financial position. The unrestricted reserves of the Charity at the year end were **£10.705**

The Trustees have resolved that a balance of £4,000 should be held in reserve being sufficient to provide for the winding up of the Charity including its employer obligations. This also acts as cash flow during the first months of each financial year as income grants are subject to annual application processes that delay receipt of funds. The remainder of the General Reserve is available to support the work of the Charity.

The Charity has adopted Financial Control, Safeguarding and Equality & Inclusion policies in accordance with best practice guidance from Contact and the National Network of Parent Carer Forums

Activities

The Charity funded and coproduced a series of 4 webinars – PfA Independent Living; ADHD; PfA Community Inclusion; Navigating the Health Service - with Bucks SENDIAS which were attended by an average of 25 parents (although ADHD was 50) but which have been made available as You Tube videos through websites to increase views significantly. We now have a suite of 12 webinars.

The Charity held an Annual Meeting attended by 30 parents – in person - at which we made the presentation of the Forum's work in 2023-24 available, alongside current year priorities. The same event was also a Q&A session with the new Director of Education and a presentation on the work of the Joint Commissioners.

The Charity delivered an annual survey on SEND with 250+ responses. The report is presented to the SEND Partnership Board for response, as well as providing significant year on year improvement data in relation to the SEND strategy and the WSoA.

The Charity hosted two sets of two workshops alongside Bucks SENDIAS and Bucks Council- one on ADHD and one on Community Inclusion. The workshops were attended by parents, professionals and schools/settings with one online and one in person for each topic. There were 54 and 32 participants respectively. The aim of the workshops was to build a better understanding of both current experiences in these areas and to identify ways in which the Bucks offer can be improved. Each set of workshops has led to the coproduction of a report to the SEND Partnership Board with pragmatic, easily deliverable actions. Feedback has shown that participants felt listened to and more optimistic about the future.

The Charity attended strategic governance meetings including the WSoA Group & Children's Partnership Board; and co-chaired the SEND Partnership Board and the SENDIAS Steering Group. We had parent representatives engaged in all impact groups under the SEND Improvement Plan – PfA; Early Support; Higher Needs CYP; and Education Place Sufficiency – as well as the BAU groups including Statutory Performance; Local Offer; and numerous project groups and those for the recommissioning of Therapies. We estimate attending 200 meetings a year.

The Charity have continued to engage when requested in the process relating to Delivering Better Value and to the reorganisation of the SEND related teams at the Council as well as the governance structure. Neither of these were coproduced despite our constant request for them to be so but we have always engaged in a way that seeks to bring the maximum benefit to SEND CYP and makes for the greatest impact of parent voice in the system.

The Charity benefitted considerably from the work of the Communications Officer and the Participation Lead who have focus on growing the numbers of parents engaged across the work of the Forum. These 2 officers led on the considerable task of updating our website, alongside our growing social media engagement to respond to the feedback from members and the wider parent community that they don't know enough of the considerable reach of the Forum.

This year also saw the resignation of the long serving Team Leader and an appointment process for a successor. The new postholder took up the role in full after Christmas following

a two-month induction period and benefitted from coaching support from an experienced former PCF lead from another region because of a Priority Grant.

The Charity have continued to press for the embedding of the Local Area Coproduction Strategy and we have offered input into a significant range of other working papers. Unfortunately, the local area has been very inward looking this year as concerns rise about SEND funding and we were not party at all to the decision to stop making payments from the Higher Needs Block Fund in September and which remains in place except for very limited cases. In addition, despite our strong efforts we have not been able to secure the publication of the coproduced draft Autism Strategy; a review of the Sufficiency of Education Place strategy; nor a review of the Short Breaks offer, which is increasingly not fit for purpose.

The operation of the Charity is an increasingly complex task given the legislative changes applying to charities and employers. Whilst this has been a year when these matters have been business as usual it has continued to require significant input of time by core officers. We fully engaged in the region including providing for its financial management and employment needs, as well as the Courageous Conversations and nationally including the What Works Well in SEND process and the national conference.

What were the forum's greatest achievements in 2024/25?

The details are recorded above but in summary:-

- Healthwatch Report on Transfer from Children's to Adults Health Services
- Workshops and Reports to enhance the offer for ADHD in Buckinghamshire
- Webinars on Independent living; ADHD; Navigating the Health Service and Community Inclusion
- AGM attended by the Director of Education & the Head of Integrated Commissioning
- Growth in Social Media presence
- Succession planning and delivery for the role of Team Leader
- Securing an increased grant from the Local Area

What were the forum's greatest challenges in 2024/25?

The details are recorded above but in summary:-

- A significant reduction in Strategic Engagement
- Exclusion from discussions concerning Council funding decisions in relation to the ceasing of payments from the Higher Needs Block, as well as refocussing of SEND Improvement plans to focus on areas of concern for spending including transport.
- A lack of a plan for sufficiency of school and college places
- A further reorganisation of the ICB in BOB increasing fragmentation of resource and planning
- A refusal to engage in a long overdue review of short breaks provision

Public Benefit

We declare that we have had due regard to the Charity Commission guidance on public benefit in exercising our power and duties.

Approved by the Trustees

18th July 2025
Lucy Jones, Team Leader

INDEPENDENT EXAMINER'S REPORT

At the request of the Trustees, I have examined the receipts and payments account for the year ending 31st March 2025, along with the related paperwork.

In my opinion, the financial statement that follows gives a fair view of the financial activity of the Charity in the year ending 31st March 2025.

Joanne Potts

18th July 2025

FINANCIAL STATEMENTS

Income and Expenditure 1st April 2024 to 31st March 2025 – General Fund

	2025 £	Note	2025 £	2024 £	2024 £
Receipts					
Grants – BCC	17,500	1		14,834	
Grants – DfE	17,950			17,500	
Regional Admin	400			400	
Donations	<u>0</u>			<u>0</u>	
			35,850		32,734
Payments					
Promotion Costs	0			0	
Participation	(4,143)			(4,528)	
Attendance Fees	(9,308)	2		(14,449)	
Travel Costs	(583)			(978)	
Conferences/Events	(1,200)	3		0	
Room Hire	(548)			(1,183)	
Refreshments	(407)			(386)	
Regional Participation	(504)			(706)	
Childcare	(70)			0	
General Admin	(10,267)	4		(6,180)	
Finance Admin	(2,573)			(2,040)	
Audit and Accountancy Fees	(100)			(300)	
Printing	0			(65)	
Postage	(431)			(405)	
Telephone	(15)			0	
Stationery	0			(3)	
Website Costs	(378)			(4,764)	
IT Costs	(2,184)	5		(829)	
Training Costs	(3,508)	3		(2,844)	
Insurance	(146)			(146)	
Miscellaneous	<u>0</u>			<u>0</u>	
			(36,362)		(39,804)
Surplus receipts over payments			(512)		(7,070)
Reserves brought forward			11,217		18,287
Reserves carried forward			<u>10,705</u>		<u>11,217</u>

Notes

1. Increased grant secured from Buckinghamshire Council to match DfE grant
2. Reduced due to large scale cancellations of planned meetings by Council
3. Costs relating to ADHD workshops and webinar supported by funds received in preceding year
4. Appointment of new Team Leader needed overlap costs and induction support
5. Renewal of IT equipment

FINANCIAL STATEMENTS**Income and Expenditure 1st April 2024 to 31st March 2025 – Regional Cluster**

	2025 £	Note	2025 £	2024 £	2024 £
Receipts					
From Cluster	5,700			5,700	
Misc Income	<u>5,700</u>			<u>3,016</u>	
			11,400		8,716
Payments					
Meetings	(1,108)			(1,353)	
Administration	(3,752)			(4,339)	
Representative Engagement	0			0	
SE19 Regional work	(881)			(803)	
Regional Training	(1,510)			(2,290)	
Regional Other	(1,865)			(610)	
Financial Services	(400)			(400)	
Audit	(50)			(100)	
Activities	<u>0</u>			<u>0</u>	
			(9,566)		(9,895)
			<u> </u>	<u> </u>	
Surplus receipts over payments			1,834		(1,179)
Reserves brought forward			18,100		19,279
			<u> </u>	<u> </u>	
Reserves carried forward			<u>19,935</u>		<u>18,100</u>

Balance of Funds 31st March 2025

	2025	2024
	£	£
Current Assets		
Cash at bank and in hand	30,840	29,262
	<hr/>	<hr/>
Net Assets	<u>30,840</u>	<u>29,262</u>
Current Liabilities		
Monies owed to the Cluster	19,935	18,100
PAYE/NIC to pay to HMRC	201	(55)
Reserves		
General reserves	10,705	11,217
	<hr/>	<hr/>
Net Liabilities	<u>30,840</u>	<u>29,262</u>

Approved by the Trustees**18th July 2025****Lucy Jones, Team Leader**