



ANNUAL REPORT

Charity Registration 1186714 | 31 March 2021

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WELCOME



A NOTE FROM OUR CHAIRPERSON & CEO

2020 was a year like no other. When our journey began in December 2019, we could never have imagined what was right around the corner. But as the pandemic hit, almost overnight, our purpose to provide legal support to people with health and social care needs, became more important - more urgent - than ever before. And we more than rose to the challenge.

We have maintained our outstanding casework success rate. Launched a prize winning legal information chatbot. Led a helpline data project on the vanguard of data collaboration in the charitable sector and influenced public body policy and guidance. Indeed, we are extremely proud of the charity's spectacular achievements since we began officially operating as Access Social Care on 1st April 2020, during the pandemic's first wave.

Incubation we received from the Royal Mencap Society and Central England Law Centre, along with the invaluable support of our many funders, pro-bono donors and members provided us with the crucial foundations we needed to begin our critical task. However, the last year would not have been possible without the dedication of our staff and volunteers, whose commitment to justice is nothing short of remarkable. Thanks to them our inaugural year not only met but far exceeded all our expectations. Allowing Access Social Care to help more people receive the care they so desperately required, in the most desperate of times.

Throughout this report we share with you our income growth and quantitative achievements. But our work is not simply about statistics. It's helping real people, get the real support they need, and to which they have fundamental rights. Our work improves lives. Alongside our financial figures we hope you'll take a few moments to read the stories of some of those whose lives were affected by the events of the past year, real people now have better outcomes and better support through our work.

As we enter our second year, and we continue to grow in size and strength, we will continue to empower local communities with our knowledge and experience. We will continue to enforce the law with our legal expertise. And we will continue to challenge the decision-makers of the social care sector.

We will create better outcomes for everyone with social care needs.

For now, and for the future.

- Janine Tregelles, Chairperson
- Kari Gerstheimer, CEO

WHAT IS SOCIAL CARE?

Social care changes lives. Prevents loneliness. Provides intimate support. Protecting the rights of those with additional needs. Whether supplied in a private residence or in a care home, social care can be a lifeline for someone living with disabilities or mental health conditions, and for people who are ageing.

Every day millions of older and disabled people are denied the help they desperately need. Demand for social care has skyrocketed. Social care resources, meanwhile, have continued to plummet. This devastating discrepancy means people with social care needs are falling through the gap. This affects all of us, we will all need social care at some point, either for ourselves or for a loved one.

In this situation, people have a legal right to hold public bodies to account; challenging the decisions of local authorities denying or delaying their care. This requires expensive legal intervention and with most of us unable to afford lawyers we rely heavily on legal aid. However, a 92% drop in legal aid community care cases since 2010, means too often we are left fending for ourselves. We have nowhere to turn. Without access to justice, our rights do not exist. The rule of law is broken.

DID YOU KNOW?

1.5 million older people have unmet social care needs

£8 billion is the latest estimate for sector-wide funding gap in 3 years' time

8 out of 10 councils don't have sufficient funds to make up for increased costs and reduced incomes resulting from the pandemic

78% of local authorities in England and Wales are without a single community care legal aid provider

92% drop in community care legal aid cases since 2010



SCHOOL OF THOUGHT



Access Social Care was founded to help make social care accessible to all who need it. However, we knew from the beginning that education would be the key to unlocking support and success.

Before our work even begins, we start by challenging perceptions of social care and the legal profession.

Our insight tells us:

- Most UK citizens are **unaware of their social care rights**
- Some **don't know what social care means**
- Few see law as a tool to help them
- Many **lack confidence to instruct lawyers** or use legal language
- **Mistrust of legal professionals** is commonplace

At Access Social Care we've initiated a movement; educating people on how the law helps secure better outcomes for those with social care needs, driving better social care outcomes through early legal help and taking a data and evidence led strengths-based approach to catalyse system change.

THE ASC APPROACH

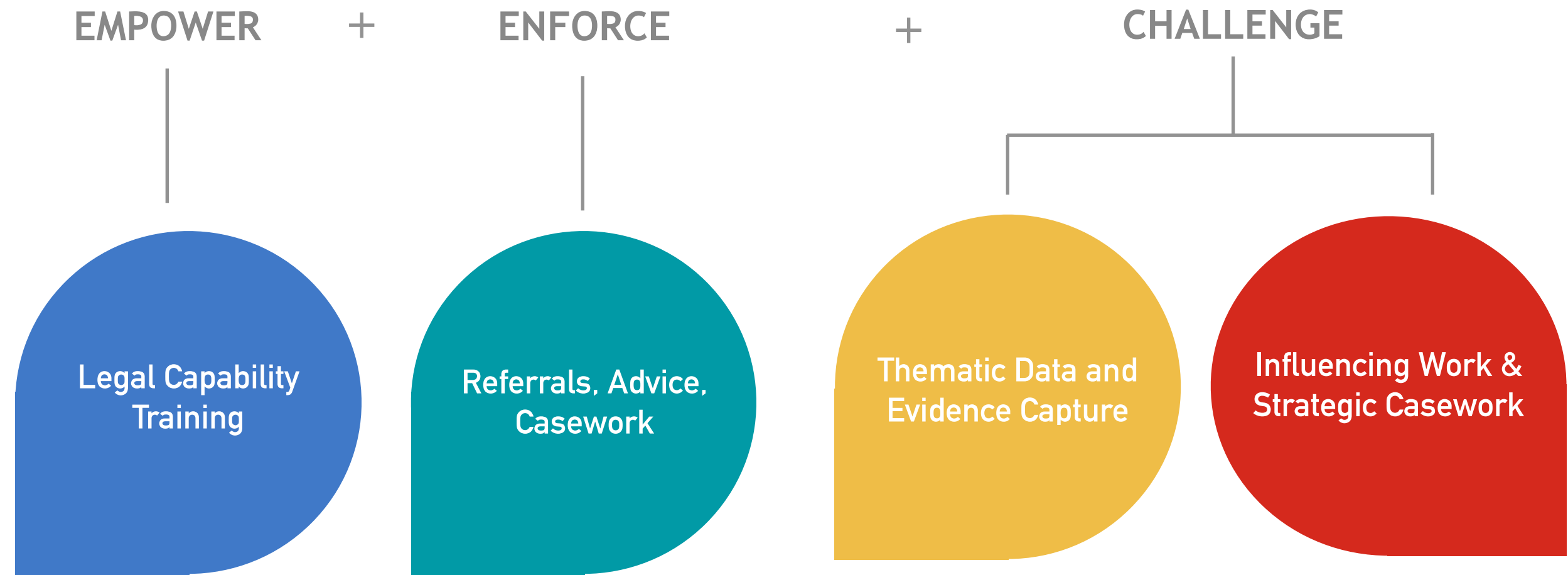
Access Social Care provides free legal advice for people with social care needs, helping them achieve a better quality of life. We highlight the gap left by cuts to Legal Aid, providing expert advice to those who can't afford it. And our network of lawyers and barristers hold a 98% success rate for ensuring fair access to justice when things go wrong.

Every day we work towards a future where social care is adequately funded. We collaborate with social services whilst ensuring legal obligations are met and we drive the change required to get support for anyone who needs it. We educate as we go, helping communities increase their knowledge of the law — and their rights in challenging it.

Our subscription-based model connects our specialist community care law expertise to other organisations through three main work-streams:



THE ASC APPROACH IN PRACTICE



PROVIDING SUPPORT

MEMBERSHIP MODEL

We connect our expertise with beneficiaries of other organisations through our membership model:

- Social care providers
- Helplines
- Place-based hubs

PEOPLE POWER

Our in-house legal team trains the lawyers working pro-bono to develop a secondary specialisation in community care law. Our pro-bono barristers assist with complex cases.

CHATBOT COUNSEL

We offer accurate legal information for free, 24/7, through our award-winning chatbot.

CLOSING CASES

We use the law positively and early on to avoid conflict. We pride ourselves on our 98% success rate in early legal intervention cases.

POSITIVE PARTNERSHIPS

We collaborate with hard-to-reach and under-served communities through our place-based hub initiative. Taking a strengths-based approach to driving system change in localities.

CREATING CHANGE

We channel our expertise into innovating the social care field; bringing about long term change and making a better future for all.

LOOK INSIDE

NEW MEMBERSHIPS

Our current members are social care providers and charities with helplines, who join our network so that their beneficiaries can access our service. In this reporting period our members are:

Mencap | Dimensions | Choice Support | United Response | MacIntyre | Discovery | Barnet Mencap | Wirral Mencap | Croydon Mencap | Milestones | Camphill Village Trust | HfT | Camphill Village Trust | Independent Age | Allsorts Glos | Age UK Gloucestershire | Inclusion Gloucestershire.

Partnerships, networks and constellations are core to our work. Partners on our flagship data sharing partnership are:

Age UK | Carers UK | Independent Age and Mencap.

Access Social Care is an active member of the Care and Support Alliance, the Voluntary Organisations Disability Group, Advice UK, and we are represented on the Administrative Justice Council Advice Panel, Social Care Futures and Fair Pay for Care Campaign.

WHAT OUR MEMBERS SAY ABOUT US:

"I will definitely be recommending this service to other managers."

I knew the cuts were unlawful, but I had no-one to ask before. Thank you for saving our service!"

"Thank goodness I called you! You have made xxx so happy that he can stay in his home!"

"Your service makes such a difference! There's never been anyone to ask before. We've just had to try and work things out for ourselves which takes so much time."

"I can't believe it took just one letter!"

WE'RE GROWING UP

In our first year we've been busily recruiting and strengthening our team. In 2020 we added further expertise and experience allowing us to provide our members and beneficiaries with a first-class service.

The Access Social Care team increased from just 2 to 22 people:

- Recruited an EA and completed a whole team TUPE transfer from Mencap in March 2020
- Matured our legal team through the appointment of 3 new community care experts
- Appointed a senior advice coordinator to grow our place-based hub



NEW LOOK, NEW FEEL

As a new charity we are rapidly growing and changing as we learn along the way. From ensuring the way we look and sound inspires trust and belief, to better engaging those we are trying to help.

This year we have taken great care to assess and adjust our ways of working, allowing us to adapt to the ever-changing landscape. By looking to improve our proposition we have laid the foundations upon which we continue to build:



[What we do](#) [Our Impact](#) [News](#) [Resources](#) [About Us](#) [Support Us](#)

We provide free legal advice and support to people in England to get the care they are entitled to.

What is [social care](#)?

[What is the issue?](#) and [what is our solution?](#)

[How we work](#)

REBRAND

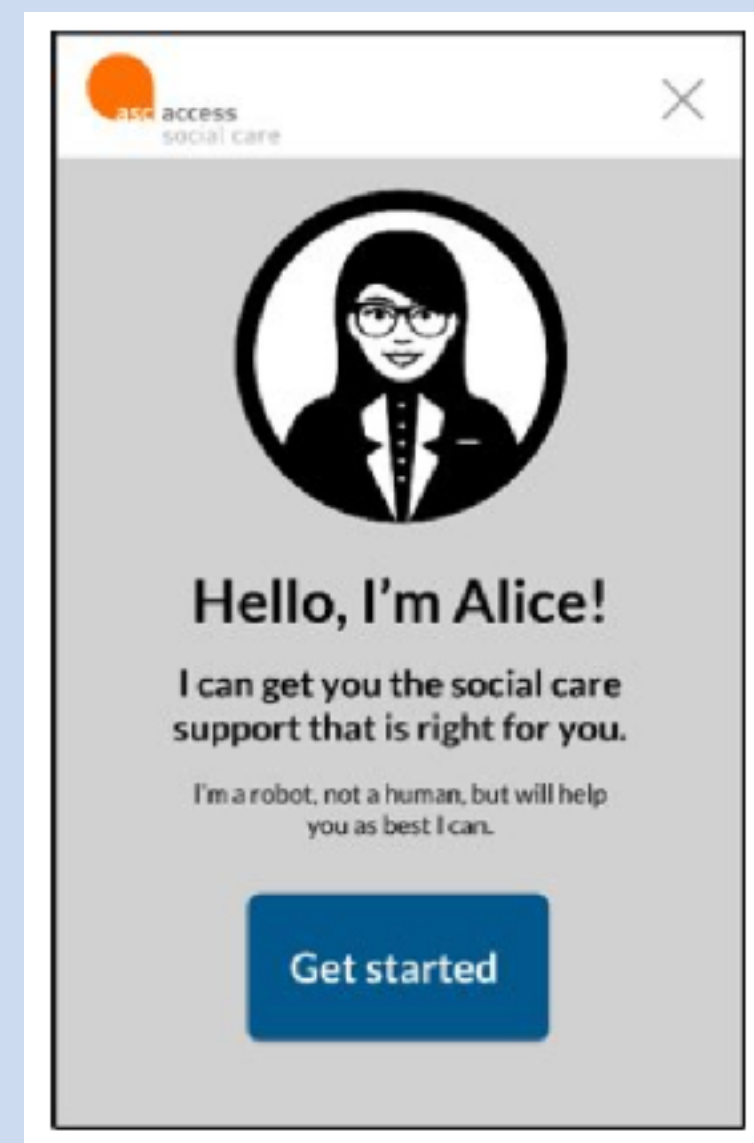
- Refined a clear proposition for the Access Social Care brand
- Secured pro-bono support from a branding agency and website designer to create distinct brand identity
- Defined our Tone of Voice for consistent comms
- Launched our new website
- Developed a suite of communication assets to amplify brand awareness
- Employed a top London PR agency; providing opportunities for ASC to speak on social care issues within the national press
- Created testimonials and video case studies to help promote our offering to a wider audience

NEW INNOVATIONS

When our legal advisors can't be there, our legal chatbot is the next best thing:

THE ASC CHATBOT

- Won the Nesta Legal Access Challenge in March 2020
- Simulates conversation with social care advice seekers
- Gives accurate and timely legal information
- Helps prevent legal problems arising
- Free at the point of use
- Available 24/7
- Accessible via desktop or mobile devices
- Gathers thematic and geographical data to help us understand advice demand and trends of unlawful public body decision making
- Recently awarded the Thrive Award from the Unltd Foundation;




MAKING A SUPERMODEL



In 2020, we identified that smaller community-based organisations struggle to afford our fees. Too many people were unable to access our service and therefore the help they needed. As a result we have committed to setting up a network of place-based hubs where we subsidise membership fees through partnership arrangements with funders. 2020 saw our very first hub open in Gloucestershire, in partnership with the Barnwood Trust.

These place-based hubs provide us with more meaningful connections to the communities we are looking to help; allowing us to respond to the needs of smaller user-led organisations working with under-served groups. These groups might otherwise associate using the law with conflict. But through education and taking a rights based approach - using the law positively and early on - we can help local citizens encourage public bodies to act lawfully. Ultimately improving first instance decision making, securing better social care outcomes and changing perceptions about the legal process.

NEW SYSTEMS & PROCESSES



Whilst delivering impact, we have been working hard to set up all the systems and processes required for a new charity. From bank accounts to accounting systems and financial models, we have set up a financial operating, management and forecasting system. Striving for excellence with our Governance we have started to build our board, recruiting two new Trustees and conducting a Governance Review.

We have developed our legal team systems – setting up a new CRM to help us capture data and manage cases, and working towards compliance with the Advice Quality Standard to ensure the highest quality advice. Working with academics Professor Lisa Vanhala and Doctor Jacqui Kinghan, we have developed our Theory of Change. We have been establishing a monitoring, evaluation and learning framework to help us understand and learn from our successes and our mistakes, so that we can continually improve our impact.

NEW RELATIONSHIPS

We would like to say a huge thank you to our funders and supporters.

Without you, our achievements this year would simply not have been possible. In this reporting period, we have benefitted from the kind support of

[Oak Foundation](#) | [Baring Foundation](#) | [Barnwood Trust](#) | [Community Justice Fund](#) | [Pears The Funding Network](#) | [The Allen and Overy Foundation](#), and [Therium](#).

We are also extremely grateful for pro-bono and in-kind support from

[Unltd](#) | [Maxx Design](#) | [Field Fisher](#) | [Baker Mackenzie](#) | [Slaughter and May](#) | [Orrrick](#) | [Shearmans and Stirling](#) and [Goring solicitors](#); as well as [39 Essex](#) | [Monkton Chambers](#), and [Landmark Chambers](#).

For our work on our Legal Information Chatbot, we won the [Nesta Legal Access Challenge](#) in March 2020 and secured prize money to further develop the platform.



THE PRESENT

WHAT WE SET OUT TO ACHIEVE



A YEAR IN REVIEW

EXTERNAL TARGETS	OUR OBJECTIVES	OBJECTIVES ACHIEVED? (Y/N)
EMPOWER	Training sessions	Y
	Rebrand by December 2020	Y
	Complete delivery of launch training to existing partners	Y
	Development of online resources (Video resources developed by December 2022)	Y
	Newsletters - Deliver monthly newsletter by December 2020	Y
	Include Rights Champion input	Y
	Rights Champions Project and L & D working groups - Recruit rights champions and hold first meeting Q3; have 10 rights champions by December 2021	Y
	L and D working groups to agree action plan to achieve culture change	Y - Consulting Member Advisory panel to agree action plan.
	Data capture - have we delivered cultural change - Baseline survey delivered to new members (50 responses) and post-training survey (50 responses) by December 2020	Delayed by Covid – Good level of responses by May 2021

A YEAR IN REVIEW

EXTERNAL TARGETS	OUR OBJECTIVES	OBJECTIVES ACHIEVED? (Y/N)
ENFORCE	Legal Chatbot (All due March 2021) - Content generation - Complete social care content for person with a social care need user profile - Content creation guidelines established for other user personas - Resources navigation and referral process in place for provider persona - Input 500 set questions, test with user groups, train team to add more data	Y
	Chatbot Testing Detailed testing conducted with at least 30 people with social care needs (including at least 5 testers from a Black, Asian or minority ethnic group) to start before March 2021	Y
	Chatbot public launch	Y (one week late – start of April)
	Pro-bono work - run 10 cases through a new clinic	Y
	Grow number. of barristers on panel by 1 by December 2020	Y
	Maintain barrister panel pick up rate at 90%	N pick up rate dropped during Covid.
	Recruitment of charitable provider members - 2 per year and 1 helpline Annual target – due by December 2020	Y Y
	Recruitment of commercial providers - 1 per year	Y
	Grow our Hub model - SW hub set up December 2020	Y
	Casework Success rate - maintain casework success rate at 90%	Y – success rate maintained at 98%
	Maximise use of legal aid - increase options for referrals with 5 new legal aid providers in our networks in year one (before December 2020)	Y
	Research - Implement data collection to evidence gaps in legal aid	Y
	Influencing - Analyse and present data to show gaps and provide model solutions	Y

A YEAR IN REVIEW

EXTERNAL TARGETS	OUR OBJECTIVES	OBJECTIVES ACHIEVED? (Y/N)
CHALLENGE	Increase sector wide legal literacy - Set up advisory panel with first panel meeting to take place in Q3	Y
	Helplines group data collaboration Helplines group data modelled and analysed State of the Nation report issued	Y
	Working with members on strategic cases	Y
	Legal Literacy - develop and maintain sector wide relationships	Y
	Sector wide collaboration with EHRC/legal aid lawyers Shared learning on emerging themes and trends – EHRC, legal aid lawyers, pro bono counsel by December 2021	Y
	Data categorisation and review - complete work on CRM by January 2021	Y
	Ongoing helplines group data collaboration	Y
	National thematic work - 5 casework outcomes evidencing successful influencing of public authorities by December 2022	Y
	Develop our strategic casework practice - run strategic cases; learn from CELC and EHRC	Y
	Increase digital and traditional media presence	Y

A YEAR IN REVIEW

INTERNAL TARGETS	OUB OBJECTIVES	OBJECTIVES ACHIEVED? (Y/N)
ORGANISATIONAL SET UP	Governance - Reporting and monitoring systems in place - KPI document to aid monitoring; financial management set up by Dec 20	Y
	Board recruitment - 1 new board member by December 2020	Y
	Policies (including handbook) - complete by March 2021	Y
	Governance review	On track
	Finance - Monthly reports, management accounts and balance sheet - Independent audit to start at end of financial year 2021	Y
	Creation of budget cost centres and financial modelling to review sustainability of each cost centre	Y
	Comms - launch Website	Y
	Charity Positioning - Agree audience and what we want them to think/feel/do by mid-January - Agree plan and integrated communications/digital strategy - Implement channel strategy	Y
	Media - Place 1 article per month	Y
	Legal team systems – develop CRM programme	Y
	AQS Submission for desk assessment by April 2021	N - Delayed desk assessment due to legal team capacity.
ORGANISATIONAL MODEL	Financial modelling - understand pricing model	Y
INCOME GENERATION	Service provision - New provider members 4 per annum	Y
	New helpline members - 1 per annum	Y
	Hub set up - 1 per annum	Y
	Fundraised income	Exceeded target which enabled us to respond to increased demand related to Covid.

EDUCATION & EARLY LEGAL ASSISTANCE

WE'VE
BEEN
EMPOWERING
& CREATING
CULTURE
CHANGE



All too often people don't know their rights or how to enforce them.

However, we know that by using the law positively, early on in the process, we can help avoid conflict and secure better outcomes. This is why we provide legal education to increase confidence in lawyers and the law, so people know exactly how, and when to use them.

In practice this means:

- Responding to feedback and **evolving our launch training** for new members to **build trust and confidence**
- Delivering 50 training sessions resulting in **239 managers trained in 29 different regions**
- Developing our **online resources** for easier access to knowledge
- Monthly newsletters **keeping people informed** of how we can help
- Recruiting 11 **rights ambassadors** to help promote our work
- Taking a learning and development approach to advice giving to **grow knowledge and understanding**

EDUCATION & EARLY LEGAL ASSISTANCE

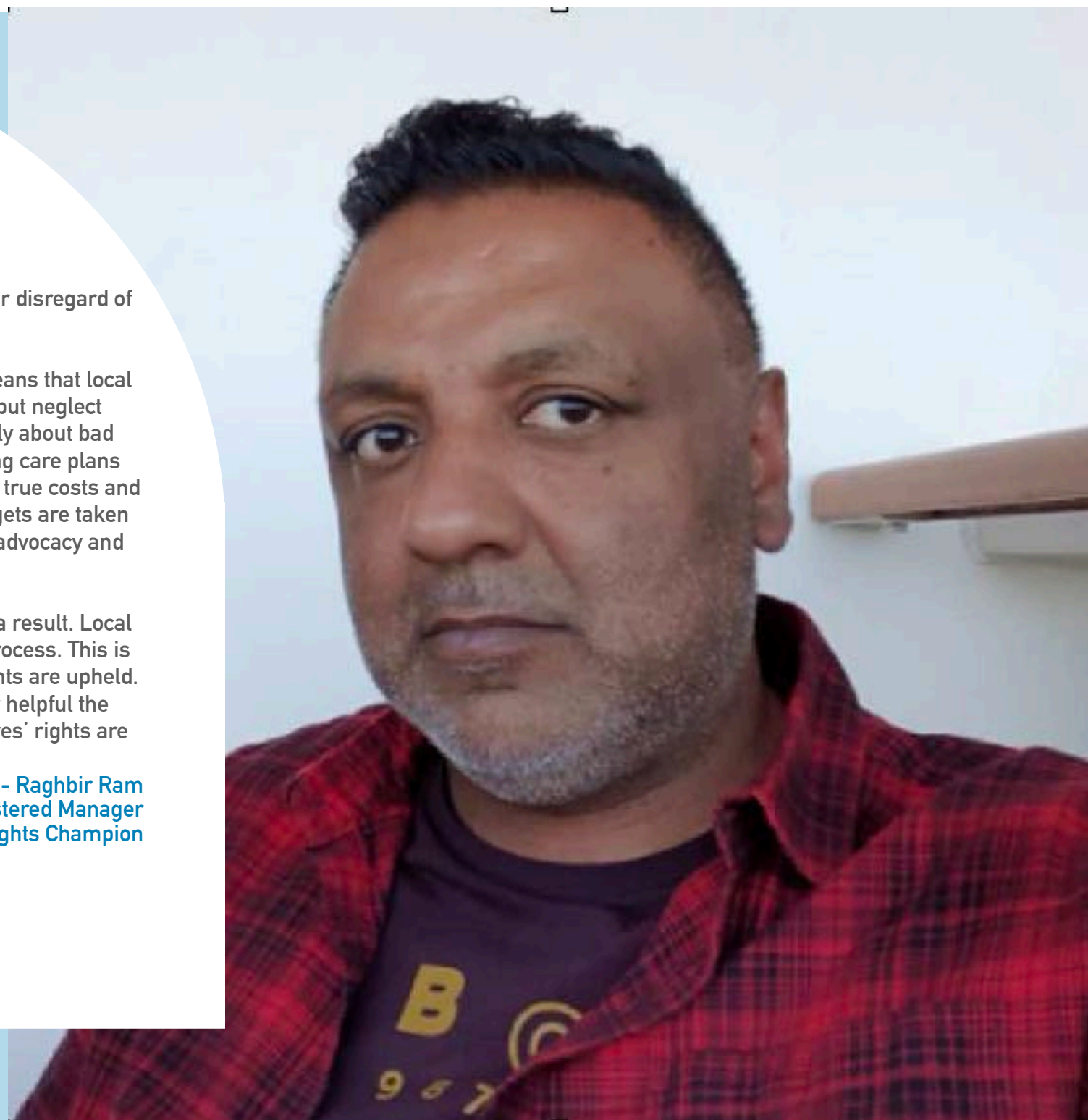
“Up and down the country people’s rights are not being upheld. There is a clear disregard of the Care Act by local authorities.

Furthermore, the lack of understanding from individuals about their rights means that local authorities can get away with it, so they hide behind finances and budgets but neglect people’s right to access services and the right support. Sometimes it’s simply about bad practice, which is not necessarily about the Care Act but might include; linking care plans together and not considering the individual; not acknowledging care providers’ true costs and taking the cheaper option against an individual’s wishes where personal budgets are taken away and people have no choice who they are supported by; or not involving advocacy and families in an annual review. There is a lot to challenge.

Our work with Access Social Care is invaluable and we are seeing change as a result. Local Authorities sitting up and taking notice – understanding when to follow due process. This is not about winning or getting what we want, it is about ensuring individuals rights are upheld.

Families are often not aware of their rights, and they feedback to us on how helpful the service is and how supported they feel. But more importantly that their relatives’ rights are upheld. We do not back down!

- Raghbir Ram
Choice Support Registered Manager
& Access Social Care Rights Champion



SOMEWHERE TO TURN

WE'VE
BEEN
ENFORCING

Problems with access to justice mean people feel there is nowhere to go when their right to social care is not upheld. We are growing our service to right these wrongs, ensuring people with social care needs get the accurate advice and support they have a right to receive.

We are providing early legal help to hold public bodies to account

- We have provided 529 one-off pieces of advice and worked on 101 cases in 2020.
- We have maintained our 98% casework success rate
- We have grown our membership – connecting our legal expertise to the beneficiaries of more helplines, social care providers, and community organisations commercial providers
- We have grown our pro-bono clinics and our Barristers panel
- In April 2021 we launched our legal information Chatbot. Available on our website, this clever Ai solution is an automated legal information provider. Providing social care law information, for free, 24/7

THIS YEAR WE
HAVE SECURED
SUPPORT FOR
MANY PEOPLE, IN
MANY DIFFERENT
WAYS:

Increases in 1:1
support hours and
direct payments


New, appropriate
accommodation for
individuals previously
refused or delayed by
the local authority

Overtaken
funding refusal from
local authority to allow
a young adult to
successful transition out
of family home into first
supported living
accommodation

Prevented
proposed unlawful
cuts to packages
and group cuts to
services by
working with
service managers
and the local
authority

Reinstated support in
cases where cuts had
already been made

THE PEOPLE WE HELP



"The new placement is just such an amazing place for Lauren to live. She has settled in so well and has changed beyond recognition. The guys who support her are more like family than support workers. My family cannot thank the Access Social Care team enough for what they have done for us."

"I will never forget it."

- Cate (Lauren's Mum)

Who We Helped: Lauren is a sociable young woman with a learning disability. When we met Lauren she was very unhappy. Sharing her home alongside people with much higher-level needs than herself, Lauren was becoming increasingly anxious, especially following intimidation by a fellow resident.

The Situation: Lauren's social worker agreed a move was needed and identified a new placement. Lauren and her mum, Cate, instantly fell in love with the new surroundings. The service manager believed Lauren would fit in well with the other residents – and Lauren could have a much longed for pet.

The local authority's funding panel rejected Lauren's placement (claiming it offered more support than Lauren needed), but did not propose any alternatives. Lauren was scared and quickly becoming more distressed.

How We Helped: We took on the case and corresponded with the local authority; setting out their legal duties to provide appropriate accommodation for Lauren, to promote her wellbeing and to involve her in care planning. The local authority was dragging its heels and risked losing the placement Lauren wanted – with no other available – but just a few letters from us led to the local authority agreeing to fund Lauren's new placement, and she moved in the following month.

THE PEOPLE WE HELP

Who We Helped: Brenda lived alone and her daughter Sian was becoming extremely concerned about her welfare. Brenda was increasingly reclusive, wearing the same clothes day and night and not eating unless food was directly put in front of her. Despite contacting both Adult Social Services and Brenda's GP for professional guidance, Sian was left alone to support her mother knowing something wasn't right.

The Situation: Although Brenda was able to self-fund her treatment, her daughter Sian felt out of her depth in trying to guide and support her, especially when Brenda received a diagnosis for Alzheimers. Countless requests for advice went unheard, meaning both Brenda and Sian were placed in an unsustainable position.

For her mother's safety, Sian moved Brenda in with her and provided round-the-clock care but sadly, Brenda sustained a broken hip through her confusion at moving home. Following a five-week hospital stay Adult Social Services incorrectly claimed to have assessed the suitability of Sian's property before granting just three thirty-minute visits a day, around the amount of time it takes for Brenda to make a single trip to the bathroom. The reality was Sian receiving next to no support and with two children and a full-time job to juggle.

How We're Helping: By providing a template letter to Sian, she was able to contact Adult Social Services and receive an initial visit. When this ultimately proved to be unsatisfactory we continued to provide counsel at each stage to support Sian in enforcing her legal rights.

"I have never asked for financial support, just advice from professionals, but I have never felt so out of my depth and on my own.

I have been let down numerous times and feel the public bodies who are meant to help are not able, and the main aim is to pass on the burden and avoid costs.

Before the legal knowledge and support of Access Social Care I was ignored, as was my Mother. Without their guidance in helping me support my mum, I truly fear she would have been left in an inhumane situation."

- Sian (Brenda's Daughter)

LONG-TERM SYSTEMIC CHANGE

WE'VE
BEEN
CHALLENGING

Public bodies do not capture enough data about social care. The lack of evidence and insight makes decision and policy making hard.

At Access Social Care we are leading the way in social care data capture and analysis. We believe a data and evidenced-based approach will enable us to clearly and effectively demonstrate the change that is required with social care. We use our data to influence and inform strategic casework.

Our Approach:

- Our monthly reports help us to **identify patterns and trends** of unlawful behaviour
- Our innovative data sharing project with Mencap, Age UK, Carers UK and Independent Age **pools data from 5 helplines and highlights issues** experienced by people with social care needs across the country
- We are collecting data to **evidence problems with legal aid**, and starting to scope solutions
- We collected **evidence from our member organisations** and from our Gloucestershire hub on cases relating to the right to family life (visiting rights) and vaccination prioritisation for people with learning disabilities

Our Outcomes:

- Our inaugural State of the Nation report was widely **picked up in the media and drew attention** to the shocking rise in helpline demand over the pandemic period
- At the beginning of the pandemic Do Not Resuscitate Orders were being issued to those with learning disabilities. We assisted Mencap in **challenging these at a local and national level** and have since provided case studies to the inquiry.
- We successfully challenged the decision by NICE to use the Clinical Frailty Scale to assess whether someone should access intensive care support in the event resources were limited. Through a pincer movement of threatened legal challenge and pressure from the policy team at Mencap we were able to **overturn this policy in two days**
- We bridge the access to justice and social care sectors and have **supported the social care sector** to respond to administrative law reform proposals
- We continue to work with Mencap and EHRC to **fight for people** with a learning disability and/or autism who are held in inpatient units, experiencing human rights abuses

UNDER THE INFLUENCE

WE'VE
BEEN
CHALLENGING

Case by case we make a difference. Holding those in charge of making unlawful decisions to account. But for real change, to make the ultimate difference, we must challenge the system.

By working with the media to grow the reputation of our CEO, Kari Gerstheimer, as an authority in social care commentary we extend our reach and influence to help us achieve this.

Working alongside our national member organisations, community groups and funders to gather data and information we will build on our media work over the next year. Continuing our mission to be a consistent voice for good and known as effective change makers in the social care landscape.

"[During the pandemic] The National Health Service was rightly first in line. But its poor cousin, social care, along with the social care workforce, and people with social care needs, have once again been left behind. Despite cross-party agreement that social care funding needs fixing, The Treasury has long been consistent in its reluctance to fund social care properly."

(The Daily Express: Kari talks about the value of social care in line with the NHS.)

"The Legal Team at my charity, Access Social Care, use Human Rights to right wrongs and ensure fair access to social care. We aim to empower and educate individuals to feel confident to seek legal advice; breaking down the perception of the law as an intimidating, complicated and opposing force."

(The Justice Gap: Kari explaining how Human Rights being under threat with the Government's review of the Human Rights Act)

"We are pleased to be stepping in to provide this much needed support for Gloucestershire with the launch of our new social care advice hub. By linking our expertise to local organisations in Gloucestershire, we want to reach as many organisations as possible, particularly those working with underrepresented groups, to ensure local people are provided with the advice and support they deserve."

(Punchline Gloucester: Kari discussing the launch of our Southwest hub)

INCOME GENERATION



MAKING
MONEY

In 2020 we benefited from a start-up grant from the Oak Foundation. However, we know that we need to make sure that we are a sustainable organisation going forwards.

We have worked hard to diversify and identify additional income streams over the past year and prioritised five areas for potential growth:

- **Memberships** - we are steadily growing our membership numbers.
- **Chatbot** - we are working with Unltd and our digital partners Springbok Ai to explore how we can generate increased income,
- **Grant Givers** – we have nurtured our existing relationships and built new ones through our fundraising programme.
- **Individual Givers** – difficulties meeting people face to face during the pandemic means we have started to engage with individuals via the LinkedIn platform; targeting Golden Circle lawyers and legal professionals with a high-value ask.
- **Fundraising Board** - beginning recruitment in 2021/22 through existing contacts in order to grow a pipeline of prospective Major Donors via, giving club, appeal or discreet events.

OUR 2020 SUCCESSES



Besides the everyday support we provide, these are a few of our favourite highlights from the past twelve months:

- **FINDING FAME** Aligning our core values and visual identity to present a clear vision for our charity. Securing press placements in national publications to raise awareness of the social care cause.
- **CHALLENGING CULTURE** Gathering evidence to provide vital support for the EHRC's proceedings against the Secretary of State for Health and Social Care for human rights' breaches of people in secure settings.
- **CRITICAL CONSULTANCY** Supporting Independent Age by training their staff in social care issues to amplify the support of more people.
- **ADVICE ALLIES** Forming an alliance, leading helplines in the collaboration of data, pooling insights and producing reports evidencing thematic trends to correct unlawful decision making.

We are proud of our 98% success rate in our cases.
So we know we can
- and must - help more people.

- ASC

OUR CHALLENGES AND LEARNINGS

Our successes haven't been without their challenges. However, quickly adapting and creating solutions means we have been able to minimise impact and disruption.

TRAINING:

Area managers struggled to attend our training due to pandemic pressures

- Delivered shorter/recorded sessions online - accessible and convenient

TEAMS:

Covid-19 meant added pressures of homeschooling, isolation and health concerns for our staff

- Offered flexible hours, a wellbeing package and supported staff to sift and prioritise to safeguard our impact

TROUBLES:

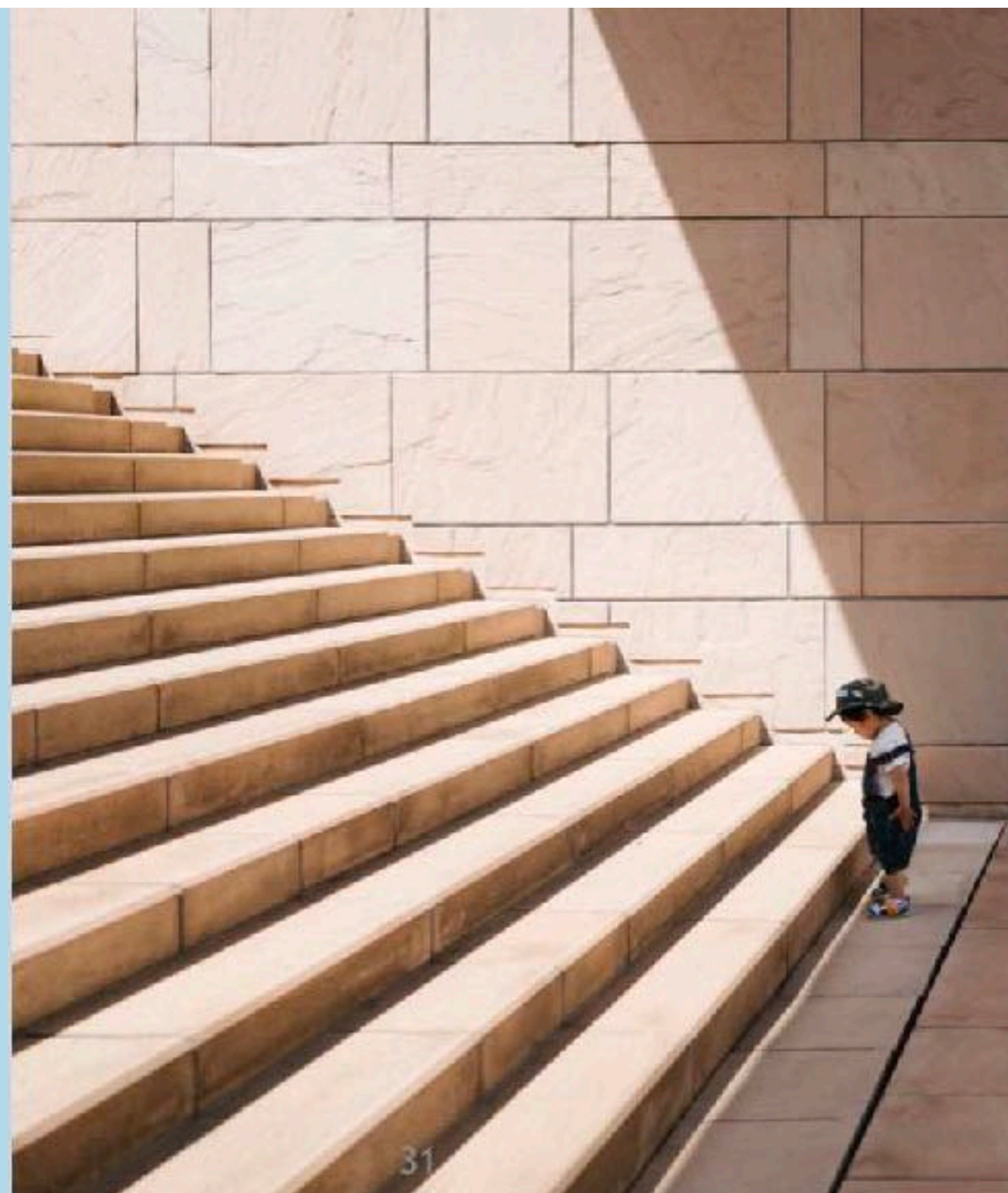
Financial pressures led to delays and organisations stopping membership.

- Forecast additional time for conversion due to changing circumstances

TRUST:

Longer than anticipated to develop relationships with frontline care managers that drive needed culture change

- Create maximum engagement with launch activity to inspire confidence



PRESSURES OF A PANDEMIC

When we first founded Access Social care, we never could have imagined that the world would be affected by a global pandemic. The virus has thrown up challenges for all of us, but many people with social care needs experienced much more serious difficulties than most. We are proud of our response.

COVID CONCERNS:

- Covid-19 pushed local authorities, and the people relying on them for care and support, to the brink
- 8/10 authorities warned of potential bankruptcy; stripping social care spending, sometimes unlawfully
- Council leaders estimate the pandemic will cut funding by a further 20%
- People with a learning disability have died at 6 times the rate of the general population
- NICE (National Institute for Health and Care Excellence) issued treatment guidelines marginalising working age disabled people



COPING WITH COVID



THE ASC RESPONSE

- Partnered with Mencap to influence NICE to amend guidelines; preventing unlawful discrimination in the treatment of working age disabled people.
- Worked swiftly to react to the unlawful practice of issuing Do Not Attempt Resuscitation Orders to people without consent.
- Led data project, tracking pandemic impact on social care, to focus strategic work on thematic issues.
- Leveraged network to expedite referrals; securing legal aid to enable much needed in person visits in conjunction with EHRC.
- Produced covid guidelines recognised by social care managers as indispensable in maintaining balance of health and safety with social care needs.
- Joined National Care Forum, along with 130 peer organisations, to call for clarification on care home visits.
- Assisted senior leadership teams across member organisations navigate the impact of rapidly changing regulations and guidance.

As well as being there for those who needed us, it was important we took the time to be there for each other. To look after staff wellbeing we introduced counselling services, emphasised the importance of flexible working and provided furlough for staff members with particularly challenging home situations.

From meditation and yoga classes to Zumba; reading clubs to Quiz nights, we Zoomed into each other's homes to laugh and build resilience together.

THE FUTURE

2021 AND BEYOND

OUR PLANS

We will continue to work on our strategic aims to increase the reach and influence of our work. By growing our membership we will find a sustainable way to provide public access to our service; providing more people with the social care they have a right to receive.

OUR IMPACT

In the 2021/22 period, we will complete our monitoring and evaluation framework in partnership with academics Professor Lisa Vanhala and Doctor Jacqui Kinghan. This will allow us to continue tracking our progress, learn from our experiences and further develop our model.

- **TO BETTER EMPOWER:** In 2021/22 we will develop more on-line resources to support our public legal education.
- **TO BETTER ENFORCE:** In 2021/22 we will continue to reach more people through the development of our legal chatbot and the growth of our membership. We are carrying out a review of our pro-bono activity to ensure that we are maximising the strength of these partnerships by targeting this support where it is needed the most.
- **TO BETTER CHALLENGE:** In 2021/22 we will be reviewing our strategic and influencing work. Following analysis we will redefine our influencing strategy to better steer our work in this important area.

OUR PRIORITIES

- **OUR TEAMS:** We are developing our operating model so that we can grow our organisation. In 2021/22 we are taking a period of consolidation so that we can feel confident that we have the right infrastructure, resources, systems and processes to support future growth.
- **OUR OFFERING:** We are growing our membership, reaching out to new partners and growing our place-based hubs.
- **OUR INCOME:** We are diversifying our income to ensure that our model is sustainable in the long term. We are evolving our membership offer, developing a commercial offer for the chatbot and broadening our fundraising activity.

OUR PROMISE

In 2021/22 we are committed to focussing on diversity. We want to stand shoulder to shoulder with Black and Asian-led organisations to reach under-served communities within our place-based hubs; tackling health and social care inequalities. Working with formal and informal community leaders we will take the time to build relationships and trust, co-create a framework which ensures parity of esteem, and responds effectively to cultural ethnic and hyper local sensitivities.

We want Access Social Care to be an organisation that celebrates difference, where all employees, clients and partners feel equally valued. We will develop our diversity strategy to ensure authenticity in our approach to diversity, and task and finish groups will help us deliver change where it is needed.

DELIVERING ON PRIORITIES



In 2021/22 we will develop more on-line resources to support our public legal education.

With an ambitious growth strategy, Access Social Care will need to quickly increase our capacity to provide high volumes of public legal education to care managers of our member organisations at times to suit their busy schedules.

The pandemic has shown that we can deliver training and engage managers remotely, and that the flexibility that online resources offer suits the increasingly stretched working lives of social care staff. Moreover, the frequent changes to regulations over the past year have highlighted the need to be responsive around training delivery and to offer a wider range of material to staff of our member organisations.

Throughout this period, we will:

- | | | |
|--|---|---|
| Apply accessibility standards to make our training available to all learners | Design our online learning provision in an agile way, testing what works and using existing software where possible | Create at least eight short learning modules within the first year |
| Conduct user research with our stakeholders | Work with each of our partners to agree the best way to disseminate our online learning within their organisation | Evaluate our online learning alongside our partners to identify the most effective way to develop our public legal education programmes |

DELIVERING ON PRIORITIES

MORE ENFORCING

In 2021/22 we will continue to reach more people through the development of our legal chatbot and the growth of our membership. We are carrying out a review of our pro-bono activity to ensure that we are maximising the strength of these partnerships by targeting this support where it is needed the most.

One of our highest priorities is helping local organisations and community leaders to feel more confident using the law. And the easiest way for us to achieve this is by training trusted intermediaries in using our legal information chatbot to give more specialist advice.

Our belief is that as we work with community leaders, we will create a movement, so that the leaders themselves carry our mission forwards. Our aim is to create a legacy of communities empowered to uphold the rule of law to ensure better social care outcomes for their citizens and fairer local systems.

We will build partnerships with community organisations and MPs in their constituency offices to encourage use of the chatbot. New grants secured will allow next level development with new functionality

Increase our memberships – helplines, providers, commercial providers. However, we will slow this growth in 21/22 to allow for a period of consolidation in order to develop the right internal infrastructures to support future expansion

Continue to intervene with early legal help to hold public bodies to account

We will set up a new place-based hub in London/SE in 2021 before finalising plans for a national network of place-based hubs. Each hub will be co-designed and co-produced with the communities it serves

Learn from local people, (particularly under-represented groups who regularly experience multiple barriers to accessing social care and information) using the chatbot. iteratively improving the product to respond better to the needs of local populations

Grow and develop our pro-bono clinics and Barristers panel; implementing changes from our strategic review

Reach more people through our chatbot and seek to license the product to other organisations to increase our impact

Collect local data in partnership with our community-based members will help us to take a data and evidence-led approach to driving change

THE FINANCIAL REPORT AND LEGAL INFORMATION

GOING CONCERN AND STATEMENT OF PUBLIC BENEFIT

GOING CONCERN

As a start-up charity, Access Social Care is well placed to manage the business risks we face. This position is supported by strong liquidity; sufficient reserves for business continuity and development plans; a good relationship with our key funders; and proven ability to retain and secure new services.

We have set out in this report a review of Access Social Care's financial performance, the reserves position and principal risks and uncertainties.

Notwithstanding the pandemic, the performance to date has been robust in terms of income generation. Whilst the pandemic has been hugely challenging at the operational level, Access Social Care has remained firmly in control of its service quality and financial performance throughout the operating period.

We have accrued over £200k of reserves in our first operating period. As set out in our reserves policy, we are working towards having 6 months operating costs to ensure business continuity and the ability to continue providing casework for our clients in the event of financial disruption. Access Social Care has maintained its cash and reserves at levels which provide a good degree of financial protection against a continuation of the pandemic through FY 2021/22.

As a new charity Access Social Care is still developing financial management processes. We have carried out a range of cashflow projections and financial modelling exercises over the past year, supported in particular by Unltd. We are currently working with an external consultant provided through the Cranfield Trust to further develop our forecasting tools to enable us to undertake regular scenario and strategic financial planning. The 2021/22 budget has been approved by the Access Social Care Board. Following the current financial modelling exercise, as well as an exercise at board level to agree on an organisational approach to financial risk, we anticipate that the Executive will make a range of investment requests to enable and facilitate successful future organisational growth.

Our planning processes, including financial projections, take into consideration the current economic climate and its potential impact on the various sources of income and planned expenditure.

The trustees therefore have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future being at least twelve months from the date of approval of these financial statements. Accordingly, the financial statements continue to be prepared on the going concern basis.

STATEMENT OF PUBLIC BENEFIT

The trustees confirm that they have complied with the duty in section 17 of the Charities Act 2011 to have regard to the Charity Commission's general guidance on public benefit, "Charities and Public Benefit". Access Social Care's charitable objects are enshrined within its memorandum and articles and as such the trustees ensure that the charity's activities are carried out for the public benefit through its strategic priorities. This is done primarily through the delivery of services aimed at people with a social care need as well as those who support them. This report allows us to show how our charitable funds are spent and the impact and benefits that has on those using our services, as well as the wider impact on society.

STATEMENT OF RESPONSIBILITIES OF THE TRUSTEES

STATEMENT OF RESPONSIBILITIES OF THE TRUSTEES

The trustees are responsible for preparing the trustees' report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charity and the incoming resources and application of resources, including the net income or expenditure, of the charity for the period. In preparing those financial statements the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and accounting estimates that are reasonable and prudent;
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

In so far as the trustees are aware:

- There is no relevant audit information of which the charity's auditors are unaware; and
- The trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charity's website.

Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions. If the CIO is wound up, the members of the CIO have no liability to contribute to its assets and no personal responsibility for settling its debts and liabilities. The trustees are members of the charity but this entitles them only to voting rights. The trustees have no beneficial interest in the charity.

Independent Auditors Godfrey Wilson Ltd were appointed as the charity's independent auditors during the year and have expressed their willingness to act in that capacity.

FACTS AND FIGURES

- We started operating with 14 staff members; by March 2021 we had 22 staff members
- £41,738 spent on public legal education
- £212,641 spent on legal advice
- £64,223 spent on our South West hub
- £143,509 spent on developing our legal chatbot
- The contribution of our volunteers is significant and helps us with our aims and objectives
- 25 chatbot volunteers, 70 x one off quantitative testers number of volunteers
 - 50 volunteer hours spent on our chatbot - ca. 50 hours
 - £88,426 spent on fundraising. £1,145,580 raised

CURRENT POSITION

Charitable Activities:

Total Income

Our total income for our first reporting period (Dec 2019 – March 2021) was £1,377,304 against a budget of £984,139.

The largest part of our income comes from our start up grant from the Oak Foundation. This income was £757,091 in the operating period. Income from other grants and donations was £387,564, some of this income must be used on activities which fall outside the operating period.

We have grown our membership subscription income to £225,178 in the operating period.

Total Expenditure

Total expenditure in the reporting period was £737,941.

Our spend on charitable activities was £649,515.

Expenditure on raising funds was £88,426.

Access Social Care has £547,594 in cash at 31 March 2021.

Restricted funds are £232,774

Unrestricted funds are £406,589

Total liabilities are £170,876 at 31st March 2021

Our risk management processes help identify where we might need reserves, and our financial management policies then determine how our resources are managed and how investment decisions are made. Annually, our board of trustees considers what resources will be required to meet Access Social Care's objectives and obligations and what the risks are that might threaten the desired outcomes.

Reserves Policy for the Charity

Reserves are maintained at a level that enables the charity to manage operational financial risks and short-term income volatility. They allow the charity to sustain service delivery, in particular legal casework support to our clients, over the long term, as well as ensuring that financial commitments can be met as they fall due.

As noted above, of the charity's £639,363 total funds at the end of March 2021, £232,774 are restricted funds and not available for general purposes.

The remaining £406,589 of total funds are unrestricted of which £24,605 is designated for programme expenditure and £150,906 are capitalised assets. Our free reserves are £231,078. Reserves are those unrestricted funds which are freely available to the trustees to spend on any of the charity's purposes. However, they exclude amounts which, if spent, would adversely affect the charity's ability to deliver its aims. Reserves do not therefore include property, funds which are set aside for programmes specifically to further our charitable objectives, or amounts set aside for essential costs.

Reserves 31 March 2021

The trustees have set a target for reserves based upon an analysis of the potential financial impacts of significant risks identified through the charity's risk management processes, as well as the need to continue to provide legal services to our clients. Access Social Care has reserves of £231,078 compared to target reserves of £339,396. Following financial modelling and risk analysis in 21/22, the charity anticipates that it will invest some reserves in a managed fashion to support the future growth of the charity.

MANAGING RISK

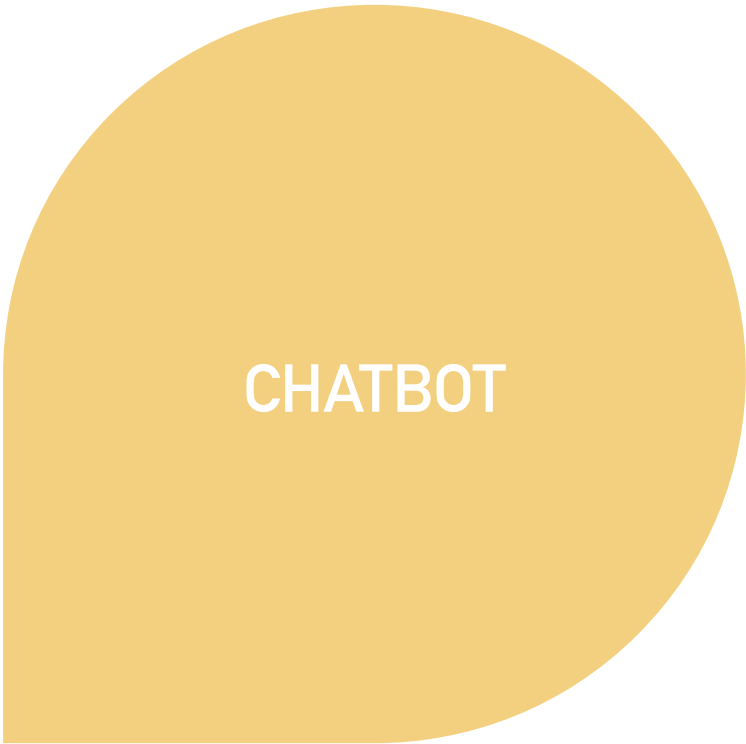
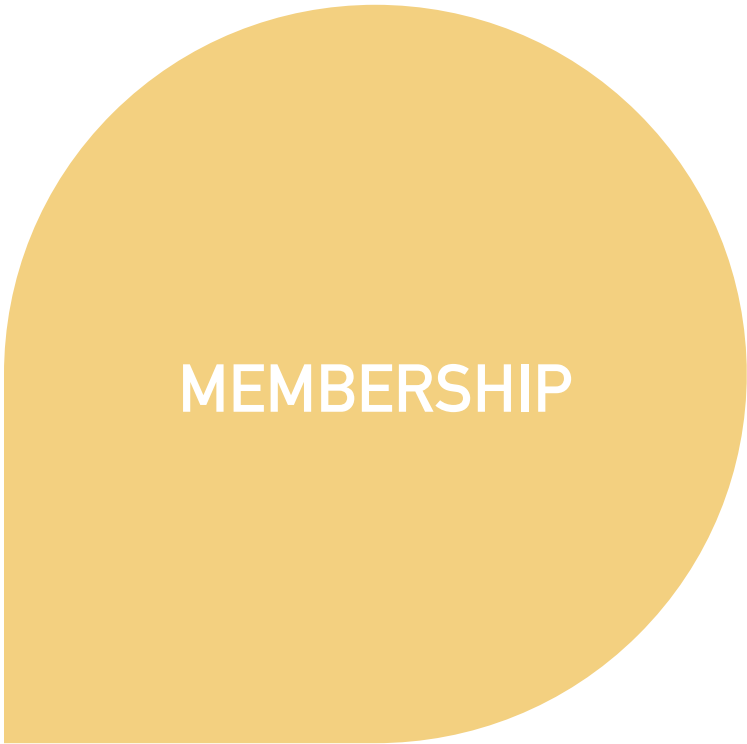
Risk Management and Internal Control for the Charity

Access Social Care continually reviews its risk framework, ensuring that it aligns with the organisation's strategic aims and objectives. The board of trustees reviews strategic risks on a quarterly basis. Independent assurance is provided by an outsourced independent audit function from Godfrey Wilson accountants. Risk management at the operational level is managed by the executive directors and departmental Heads, who review risks regularly both within their directorates and as a group.

Principal Risks for Access Social Care	What the Risks Mean	How we Mitigate the Risks
Need to increase income and bank reserves over the next 2-3 years so that we are a going concern after the term of our start up grant.	Likelihood – 4 x Impact – 5 =20	<ul style="list-style-type: none"> We are diversifying our fundraising and commercial income streams. We are increasing our fundraising capacity, growing our membership and developing a business plan for our chatbot.
Need to deliver on current contracts to a range of grant makers.	Likelihood – 2 x Impact – 5 =10	We have developed organisation wide monitoring, evaluation and learning systems to ensure that we are meeting our KPIs. KPIs are threaded through accountabilities. Progress is communicated regularly at operational, strategic and funder level.
Need to deliver on contracts to members.	Likelihood – 3 x Impact – 5 =15	We are entering a period of consolidation to review our growth; and to develop a People Strategy looking at recruitment, retention, remuneration, diversity and training.
Maintain and develop social care expertise to deliver expert legal advice through recruitment and retention of key staff members.	Likelihood – 3 x Impact – 5 =15	See above.
Define and agree service model.	Likelihood – 2 x Impact – 5 =10	Advisory board meetings with network partners set up to seek on-going advice on fees and model. Financial modelling work on-going – seeking robust challenge from financial experts. Hub model pilot live and seeking funding for roll out in other areas.
Develop and enshrine effective governance arrangements and board oversight.	Likelihood – 2 x Impact – 4 =8	<ul style="list-style-type: none"> Governance review document complete, review ongoing. Agreed to move forwards slowly in light of Covid.
Develop and implement organisational systems and IT including staff handbook and other policies and procedures.	Likelihood – 3 x Impact – 3 =9	Good progress with policy development. Handbook, and CRM are live.
Failure to protect clients from harm caused by staff or corporate negligence.	Likelihood – 1 x Impact – 5 =5	<ul style="list-style-type: none"> Working towards AQS – training and supervision arrangements are in line with the standard. Barristers panel and external consultancy (Karen Ashton) to assist with the quality of advice. Note also the work on our People Strategy and growth.
Ensure Compliance with regulatory bodies i.e. Charity commissioner, ICO, Fundraising Regulator.	Likelihood – 3 x Impact – 4 =12	GDPR advice secured from Baker MacKenzie. Policy and procedures development on-track. Independent auditors appointed and working towards first audit in June 2021.
Enshrine effective internal and external communication strategies and identify and mitigate reputational risk.	Likelihood – 3 x Impact – 5 =15	<ul style="list-style-type: none"> Contracted with external communications agency BLJ until April 2020 to put in place a comms strategy and to start to shape our brand. Working with a copy writer to develop tone of voice. Working with a brand elevator consultant to raise digital profile. Major incident policy and process drafted. Put in place policy and procedure for comms involving risk. <ul style="list-style-type: none"> Reputational risk Ethical position statement Public perception
Covid-19 impacts delivery model.	Likelihood – 5 x Impact – 4	<ul style="list-style-type: none"> Covid Impact paper prepared including mitigation plans for key staff absence. Consideration given to slowing down work streams to protect staff wellbeing. Consideration given to adapting to Covid Regulations including social distancing.

FUTURE PLANNING

To enable us to grow throughout the 2021/2 financial period, we have identified the following revenue streams:



FUNDRAISING

Our Fundraising Campaign

Access Social Care has a compelling 'ask' which has stood us in good stead in our first year with grant giving bodies. Even as a new charity, we already employ an executive member of staff focussed on fundraising and a philanthropy fundraiser, with a wealth of major donor experience, who was recruited in April 2021.

Our initial goal in 2020/1 was to begin building a stakeholder network that would ensure long-term support and consistent high-value gift giving. A stakeholder network would ideally comprise; senior members of staff and volunteers aiding introductions and building relationships with prospective donors and influential individuals who can grow our network and provide further connections to gift givers. Although our stakeholder pool is currently limited, our aim is to grow relationships with careful stewardship and networking events for groups and individuals whose interests and values closely align with our work.

Interruption to face-to-face meetings in 2020 meant the pandemic severely delayed our progress. However, we are committed to continuing our strategy in this next period, with plans to form a fundraising board lead by one of our connected trustees. Fundraising budgets for 2021/22-2023/24 will continue their focus on grant giving bodies and we will nurture our existing relationships with strategic funders whilst growing a pipeline of new funders to achieve this financial commitment. In addition, we have grown a 500+ network of high-earning legal professionals via LinkedIn – we aim to engage online with this group, using a lead magnet campaign to pull individuals offline and motivate them towards a fundraising ask. This campaign will be evaluated via KPIs and objectives throughout 2021.

ACCESS is committed to ensuring that fundraising activities are carried out in an ethical manner. The Access Social Care policy on donation and fundraising applies to the Board, casual, permanent and both contract staff and volunteers. It lays out clear processes and guidelines, with a firm position on fundraising practice and the standards expected in raising funds from the community.

Our Fundraising Principles

- Fundraising activities carried out by ACCESS will comply with all relevant laws.
- Any communications to the public made in the course of carrying out a fundraising activity shall be truthful and non-deceptive.
- All monies raised via fundraising activities will be used to support the organisation's stated mission and purpose.
- All personal information collected by ACCESS is confidential. We will not sell, give away or disclose personal information to any third party without explicit consent.
- Nobody directly or indirectly employed by or volunteering for ACCESS shall accept commissions, bonuses or payments for fundraising activities on behalf of the organisation.
- No general solicitations shall be undertaken by telephone or door-to-door.
- Fundraising activities should not be undertaken if they may be detrimental to the good name or community standing of ACCESS.
- Financial contributions will only be accepted from sources the Board considers ethical. Companies and organisations specifically excluded from making financial contributions to ACCESS include gambling, tobacco and alcohol, fossil fuel companies.

CHARITY INFORMATION

Charity Details

Charity Name: Access Your Right to Care, operating as Access Social Care

- Charity registration number: 1186714
- Registered office address: Oakwood House, St Patricks Road, CV1 2HL, Coventry, England

The Charity is constituted as a CIO and does not currently have any subsidiary undertakings.

- Details of governing document can be found at: <https://www.accesscharity.org.uk/governance>
- Organisations providing professional advice to the charity during the reporting period are as follows:
 - Central England Law Centre, Oakwood House, St Patricks Road Entrance, Coventry CV1 2HL
 - Davies Accounting, Rose Tree Cottage, Ross-on-Wye HR9 7QX
 - Godfrey Wilson, 5th Floor, Mariner House, 62 Prince Street, Bristol, BS1 4QD
 - Unltd – Business consultancy, 123 Whitecross Street, Islington, London, EC1Y 8JJ
 - BLJ – PR and Communications, 15 & 17, Grosvenor Gardens, London, SW1W 0BD
 - Fieldfisher and Gowling LLP – Legal advice Riverbank House, 2 Swan Lane, London, EC4R 3TT
 - Co-operative Bank The Co-Operative Bank, 118-120 Colmore Row, Birmingham, B3-3BD

CHARITY INFORMATION

The Board of Trustees and Delegated Arrangements

Access Social Care follows Charity Commission best practice guidance on recruitment and induction of new trustees. Skills gaps relevant to the strategic objectives of the charity are identified on the board by way of informal audit (last conducted in Spring 2020). These are addressed through the recruitment of new trustees. Potential trustees submit a CV and covering letter, and meet the CEO and one other member of the Executive team. Then the chair of trustees and two other trustees conduct an interview to assess suitability of the candidate.

New trustees are offered an induction programme including a set of key documents, meetings with other trustees, and discussions with staff. Opportunities for training are offered to support trustees in their roles.

In line with our Diversity aims, we are working hard to encourage applications from a diverse range of candidates and guarantee interviews for people from under-represented groups. We have a Governance Toolkit including an induction checklist for new Trustees.

The Articles of Association include terms of office and, with the exception of two of the founding trustees, an initial appointment is made for a 3-year term. Trustees will be eligible for reappointment for one further term of 3 years. The two founding trustees are appointed as follows and will be eligible for a further term of 3 years:

- Janine Tregelles – 5 years
- Chris Hale – 4 years

The Board of Trustees is responsible for determining the overall strategic direction of the charity and for developing policies and plans to support the delivery of charitable objectives. The Board monitors progress across all areas of activity including legal requirements and financial performance. The Board has agreed to carry out a full Governance Review to ensure excellence across all governance matters. Work on the Governance Review is on track and on-going. If the CIO is wound up, the Trustees as members of the CIO, have no liability to contribute to its assets and no personal responsibility for settling its debts and liabilities.

A chief executive officer (CEO) is appointed by the trustees to manage the day-to-day operations of the charity. To facilitate effective operations, the authority for operational matters including financial management, employment and performance relating to agreed key objectives is delegated to the CEO and other members of the Executive team. Any decisions outside of the strategic direction agreed by the Board, or more than £100,000 outside of the agreed budget, are referred to trustees for approval.

Pay and remuneration of the charity's key management personnel is reviewed by the board each year and any changes made are based on performance, an assessment of the market, the financial position of the organisation and relativity across the team.

Volunteers

Access Social Care volunteers support the charity's work in many ways and the charity benefits greatly from their experience and commitment to the cause. The trustees are grateful for the dedicated efforts of the volunteers who are involved in:

- The development of the chatbot
- The provision of legal advice
- The provision of legal education

We are also grateful to our team of Rights Ambassadors who help spread the word about the use of the law in their communities.

At least 200 people provided voluntary service to the charity in our first accounting period.

This Trustees' Annual Report was approved by the Trustees on 28th September 2021 and signed on their behalf by



Janine Tregelles - Chair

Access Your Right To Care

Reference and administrative details

For the period ended 31 March 2021

Charity number	1186714										
Registered office	Coventry Law Centre Ltd Oakwood House Cheylesmore Coventry CV1 2HL										
Trustees	The trustees who served during the period and up to the date of this report were as follows: Christopher Hale Kevin McGuirk Rebecca Mills Linda Redford Janine Tregelles										
Chief executive officer	Kari Gerstheimer										
Senior management team	<table> <tr> <td>Joanne Williams</td><td>Director of Partnerships and Engagement</td></tr> <tr> <td>Lainey Gough</td><td>Head of Legal</td></tr> <tr> <td>Catriona Filmer</td><td>Head of Legal</td></tr> <tr> <td>Miriam Valencia</td><td>Head of Operations</td></tr> <tr> <td>Hannah Hewish</td><td>Legal Strategy Manager</td></tr> </table>	Joanne Williams	Director of Partnerships and Engagement	Lainey Gough	Head of Legal	Catriona Filmer	Head of Legal	Miriam Valencia	Head of Operations	Hannah Hewish	Legal Strategy Manager
Joanne Williams	Director of Partnerships and Engagement										
Lainey Gough	Head of Legal										
Catriona Filmer	Head of Legal										
Miriam Valencia	Head of Operations										
Hannah Hewish	Legal Strategy Manager										
Bankers	The Co-Operative Bank Business Direct Skelmerdale WN8 6GH										
Auditors	Godfrey Wilson Limited Chartered accountants and statutory auditors 5th Floor Mariner House 62 Prince Street Bristol BS1 4QD										

Independent Auditors Report

To the members of

Access Your Right to Care

Opinion

We have audited the financial statements of Access Your Right To Care (the 'charity') for the period ended 31 March 2021 which comprise the statement of financial activities, balance sheet, statement of cash flows and the related notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the charity's affairs as at 31 March 2021 and of its incoming resources and application of resources, including its income and expenditure, for the period then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Charities Act 2011.

Basis for Opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other Information

The trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' report. We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- sufficient accounting records have not been kept;
- the financial statements are not in agreement with the accounting records and returns; or
- we have not obtained all the information and explanations necessary for the purposes of our audit.

Responsibilities of the trustees

As explained more fully in the trustees' responsibilities statement set out in the trustees' report, the trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as they determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

Independent Auditors Report

To the members of

Access Your Right to Care

Our responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The procedures we carried out and the extent to which they are capable of detecting irregularities, including fraud, are detailed below:

(1) We obtained an understanding of the legal and regulatory framework that the charity operates in, and assessed the risk of non-compliance with applicable laws and regulations. Throughout the audit, we remained alert to possible indications of non-compliance.

(2) We reviewed the charity's policies and procedures in relation to:

- Identifying, evaluating and complying with laws and regulations, and whether they were aware of any instances of non-compliance;
- Detecting and responding to the risk of fraud, and whether they were aware of any actual, suspected or alleged fraud; and
- Designing and implementing internal controls to mitigate the risk of non-compliance with laws and regulations, including fraud.

(3) We inspected the minutes of trustee meetings.

(4) We enquired about any non-routine communication with regulators and reviewed any reports made to them.

(5) We reviewed the financial statement disclosures and assessed their compliance with applicable laws and regulations.

(6) We performed analytical procedures to identify any unusual or unexpected transactions or balances that may indicate a risk of material fraud or error.

(7) We assessed the risk of fraud through management override of controls and carried out procedures to address this risk. Our procedures included:

- Testing the appropriateness of journal entries;
- Assessing judgements and accounting estimates for potential bias;
- Reviewing related party transactions; and
- Testing transactions that are unusual or outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. Irregularities that arise due to fraud can be even harder to detect than those that arise from error as they may involve deliberate concealment or collusion.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charity's trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Date: 28 September 2021

GODFREY WILSON LIMITED
Chartered accountants and statutory auditors
5th Floor Mariner House
62 Prince Street
Bristol
BS1 4QD

Godfrey Wilson Limited

Access Your Right To Care

Statement of financial activities

For the period ended 31 March 2021

				16 months 2021 Total £
	Note	Restricted £	Unrestricted £	
Income from:				
Donations	2.	1,059,150	86,430	1,145,580
Charitable activities	3.	-	231,711	231,711
Investments		-	13	13
Total income		<u>1,059,150</u>	<u>318,154</u>	<u>1,377,304</u>
Expenditure on:				
Raising funds		88,426	-	88,426
Charitable activities		<u>606,941</u>	<u>42,574</u>	<u>649,515</u>
Total expenditure	5.	<u>695,367</u>	<u>42,574</u>	<u>737,941</u>
Net income		363,783	275,580	639,363
Transfers between funds		<u>(131,009)</u>	<u>131,009</u>	<u>-</u>
Net movement in funds	6.	232,774	406,589	639,363
Reconciliation of funds:				
Total funds brought forward		<u>-</u>	<u>-</u>	<u>-</u>
Total funds carried forward		<u>232,774</u>	<u>406,589</u>	<u>639,363</u>

All of the above results are derived from continuing activities. There were no other recognised gains or losses other than those stated above. Movements in funds are disclosed in note 15. to the accounts.

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Balance sheet

As at 31 March 2021

	Note	£	2021 £
Fixed assets			
Tangible assets	9.		7,397
Intangible assets	10.		<u>143,509</u>
			150,906
Current assets			
Debtors	11.	111,739	
Cash at bank and in hand		<u>547,594</u>	
		659,333	
Liabilities			
Creditors: amounts falling due within 1 year	12.	<u>170,876</u>	
Net current assets			<u>488,457</u>
Net assets	14.		<u>639,363</u>
Funds	15.		
Restricted funds			232,774
Unrestricted funds:			
Designated funds			24,605
General funds			<u>381,984</u>
Total charity funds			<u>639,363</u>

Approved by the trustees on 28 September 2021 and signed on their behalf by



Janine Tregelles - Chair

Access Your Right To Care

Statement of cash flows

For the period ended 31 March 2021

	2021 £
Net movement in funds	639,363
Adjustments for:	
Depreciation charges	2,835
Dividends, interest and rents from investments	(13)
Decrease / (increase) in debtors	(111,739)
Increase / (decrease) in creditors	<u>170,876</u>
Net cash provided by operating activities	<u>701,322</u>
Cash flows from investing activities:	
Dividends, interest and rents from investments	13
Purchase of tangible fixed assets	(10,232)
Purchase of intangible fixed assets	<u>(143,509)</u>
Net cash used in investing activities	<u>(153,728)</u>
Increase in cash and cash equivalents in the period	547,594
Cash and cash equivalents at the beginning of the period	<u>-</u>
Cash and cash equivalents at the end of the period	<u>547,594</u>

The charity has not provided an analysis of changes in net debt as it does not have any long term financing arrangements.

Access Your Right To Care

Notes to the financial statements

For the period ended 31 March 2021

1. Accounting policies

a) Basis of preparation

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities in preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

Access Your Right To Care meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note.

b) Going concern basis of accounting

The accounts have been prepared on the assumption that the charity is able to continue as a going concern, which the trustees consider appropriate having regard to the current level of unrestricted reserves and having considered the potential financial implications of the ongoing Covid pandemic. There are no material uncertainties about the charity's ability to continue as a going concern.

c) Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item of income have been met, it is probable that the income will be received and the amount can be measured reliably.

Income from the government and other grants, whether 'capital' grants or 'revenue' grants, is recognised when the charity has entitlement to the funds, any performance conditions attached to the grants have been met, it is probable that the income will be received and the amount can be measured reliably and is not deferred.

Income from subscriptions received in advance is deferred until criteria for income recognition are met.

d) Donated services and facilities

Donated professional services and donated facilities are recognised as income when the charity has control over the item, any conditions associated with the donated item have been met, the receipt of economic benefit from the use by the charity of the item, is probable and the economic benefit can be measured reliably. In accordance with the Charities SORP (FRS 102), general volunteer time is not recognised.

On receipt, donated professional services and donated facilities are recognised on the basis of the value of the gift to the charity which is the amount the charity would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognised in expenditure in the period of receipt.

As discussed in the trustees' report, the charity benefitted from significant pro bono support in 2021, however these have not been recognised in the accounts on the basis that the charity would not have been able to afford these services if not provided for free.

e) Interest receivable

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity: this is normally upon notification of the interest paid or payable by the bank.

f) Funds accounting

Unrestricted funds are available to spend on activities that further any of the purposes of the charity. Designated funds are unrestricted funds of the charity which the trustees have decided at their discretion to set aside to use for a specific purpose. Restricted funds are donations which the donor has specified are to be solely used for particular areas of the charity's work or for specific projects being undertaken by the charity.

g) Expenditure and irrecoverable VAT

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Irrecoverable VAT is charged as a cost against the activity for which the expenditure was incurred.

h) Allocation of support and governance costs

Support costs are those functions that assist the work of the charity but do not directly undertake charitable activities. Governance costs are the costs associated with the governance arrangements of the charity, including the costs of complying with constitutional and statutory requirements and any costs associated with the strategic management of the charity's activities. These costs have been allocated between cost of raising funds and expenditure on charitable activities based on the proportion of direct costs, as follows:

	2021
Raising funds	12%
Charitable activities	88%

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Notes to the financial statements

For the period ended 31 March 2021

1. Accounting policies (continued)

i) Tangible fixed assets

Depreciation is provided at rates calculated to write down the cost of each asset to its estimated residual value over its expected useful life. The depreciation rates in use are as follows:

Computer equipment 3 years straight line

Items of equipment are capitalised where the purchase price exceeds £500.

j) Intangible fixed assets

Internally generated intangible assets meeting the relevant recognition criteria are initially measured at cost. Intangible fixed assets relate to the costs incurred in developing the charity's ChatBot asset. No amortisation has been charged as the asset is currently under development.

k) Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

l) Cash at bank and in hand

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

m) Creditors

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

n) Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently recognised at amortised cost using the effective interest method.

o) Pension costs

The charity operates a defined contribution pension scheme for its employees. There are no further liabilities other than that already recognised in the SOFA.

p) Accounting estimates and key judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying values of assets and liabilities that are not readily apparent from other sources. The estimates and underlying assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

The key sources of estimation uncertainty that have a significant effect on the amounts recognised in the financial statements are the depreciation and amortisation policies as set out in notes 1 i) and j) above.

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[For the period ended 31 March 2021](#)

2. [Income from donations](#)

	16 months 2021	
	Restricted £	Unrestricted £
Oak Foundation grant	757,091	-
Trusts and foundations	302,059	38,233
Corporate donations	-	45,500
Individual donations	-	1,772
Coronavirus Job Retention Scheme	-	925
Total income from donations	1,059,150	86,430
		1,145,580

3. [Income from charitable activities](#)

	16 months 2021	
	Restricted £	Unrestricted £
Consultancy income	-	6,533
Subscriptions	-	225,178
Total income from charitable activities	-	231,711
		231,711

4. [Government grants](#)

The charity received government grant funding under the Coronavirus Job Retention Scheme in the period to 31 March 2021. The total amount received was £925. There are no unfulfilled conditions or contingencies attaching to these grants.

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[Notes to the financial statements](#)

[For the period ended 31 March 2021](#)

5. Total expenditure

	Raising funds £	Charitable activities £	Support and governance costs £	16 months 2021 Total £
Staff costs (note 7)	70,903	473,392	66,150	610,445
Other staff costs	-	2,136	13,601	15,737
Evaluation	-	6,875	-	6,875
Consultancy	-	34,238	-	34,238
IT and telephone costs	-	2,767	39,560	42,327
Office costs	-	1,397	4,145	5,542
Finance and governance	-	-	17,569	17,569
Depreciation	-	-	2,835	2,835
Irrecoverable VAT	-	-	2,373	2,373
Sub-total	70,903	520,805	146,233	737,941
Allocation of support and governance costs	17,523	128,710	(146,233)	-
<u>Total expenditure</u>	<u>88,426</u>	<u>649,515</u>	<u>-</u>	<u>737,941</u>

Total governance costs were £4,950.

Access Your Right To Care

Notes to the financial statements

For the period ended 31 March 2021

6. Net movement in funds

This is stated after charging:

16 months

2021

£

Trustees' remuneration

Nil

Trustees' reimbursed expenses

199

Auditors' remuneration:

■ Statutory audit (including VAT)

5,940

■ Other services (including VAT)

2,280

During the period, one trustee was reimbursed for travel expenses of £199.

7. Staff costs and numbers

Staff costs were as follows:

16 months

2021

£

Salaries and wages

545,888

Social security costs

38,761

Pension costs

25,508

Freelancers

288

610,445

2021

No.

Number of employees earning in the range of:

£60,000 - £70,000

1

£70,000 - £80,000

1

The key management personnel of the charity comprise the Trustees, Chief Executive Officer, and Senior Management Team. The total employee benefits of the key management personnel for the period were £353,625.

2021

No.

Average head count

14

8. Taxation

The charity is exempt from corporation tax as all its income is charitable and is applied for charitable purposes.

Access Your Right To Care

Notes to the financial statements

For the period ended 31 March 2021

9. Tangible fixed assets

IT equipment £

Cost

At 3 December 2019

Additions in period

-

10,232

At 31 March 2021

10,232

Depreciation

At 3 December 2019

Charge for the period

-

2,835

At 31 March 2021

2,835

Net book value

At 31 March 2021

7,397

At 3 December 2019

-

10. Intangible fixed assets

Assets under development £

Cost

At 3 December 2019

Additions in period

-

143,509

At 31 March 2021

143,509

Amortisation

At 3 December 2019

Charge for the period

-

-

At 31 March 2021

-

Net book value

At 31 March 2021

143,509

At 3 December 2019

-

Intangible fixed assets relates to the charity's ChatBot app, which is currently under development.

Access Your Right To Care

Notes to the financial statements

For the period ended 31 March 2021

11.	Debtors				
				2021	
				£	
	Trade debtors			93,920	
	Prepayments			3,195	
	Accrued income			1,600	
	Other debtors			13,024	
				<u>111,739</u>	
12.	Creditors: amounts due within 1 year			2021	
				£	
	Trade creditors			9,391	
	Accruals			14,881	
	Other taxation and social security			27,712	
	Deferred income (see note 13.)			118,892	
				<u>170,876</u>	
13.	Deferred income			2021	
				£	
	At 3 December 2019			-	
	Deferred during the period			118,892	
	Released during the period			<u>-</u>	
	At 31 March 2021			<u>118,892</u>	
	Deferred income relates to subscription income invoiced in advance.				
14.	Analysis of net assets between funds				
		Restricted funds	Designated funds	General funds	Total funds
		£	£	£	£
	Tangible fixed assets	-	-	7,397	7,397
	Intangible fixed assets	-	-	143,509	143,509
	Current assets	282,774	24,605	351,954	659,333
	Current liabilities	<u>(50,000)</u>	<u>-</u>	<u>(120,876)</u>	<u>(170,876)</u>
	Net assets at 31 March 2021	<u>232,774</u>	<u>24,605</u>	<u>381,984</u>	<u>639,363</u>

Access Your Right To Care

Notes to the financial statements

For the period ended 31 March 2021

15. Movements in funds

	At 3 December 2019 £	Income £	Expenditure £	Transfers between funds £	At 31 March 2021 £
Restricted funds					
Oak Foundation	-	718,591	(628,212)	(86,729)	3,650
Hub / Casework	-	120,749	(65,879)	-	54,870
ChatBot	-	219,810	(1,276)	(44,280)	174,254
Total restricted funds	-	1,059,150	(695,367)	(131,009)	232,774
Unrestricted funds					
Designated funds	-	35,000	(10,395)	-	24,605
General funds	-	283,154	(32,179)	131,009	381,984
Total unrestricted funds	-	318,154	(42,574)	131,009	406,589
Total funds	-	1,377,304	(737,941)	-	639,363

Purposes of restricted funds

Oak Foundation

This a core grant which has enabled the set up of Access Social Care. The majority of the grant covers the cost of salaries.

Hub / Casework

These funds are to set up the place-based hub in Gloucestershire, fund community care casework, strategic casework and strategic data work.

ChatBot

These funds are to develop a legal information chatbot, which will be free at the point of use and available on the Access Social Care website.

Purposes of designated funds

This is grant income which been internally designated for programme work, mainly on the ChatBot project.

Transfers between funds

Transfers between funds relate to restricted capital expenditure for the ChatBot project.

16. Related party transactions

There were no related party transactions during the period.

THANK YOU

We wish to thank all of our donors, funders and supporters for helping make our first year as a charity a resounding success. We look forward to working together again in 2021-22.

With best wishes,
The Access Social Care team

Access Social Care

Oakwood House, St Patricks Road,
CV1 2HL, Coventry, England
enquiries@accesscharity.org.uk