



ACFA Trustee Annual Report

April 2023 - March 2024

Trustees at period ending 31/03/2024

Katherine Tanko - Trustee and Chair

Karen Bowers - Trustee and Vice Chair

Alice Tibbert - Trustee and Secretary

Dr Robert France - Trustee and Treasurer

Frances Begley - Trustee

Michael Harris - Trustee

William Cotterill - Trustee

Alison Rush - Trustee (appointed 30/05/2023)

Fiona Cope - Trustee (appointed 30/05/2023)

Jon Shoesmith - Trustee (appointed 26/09/2023)

Governing Document

ACFA: The Advice Network is a Charitable Incorporated Organisation. It was established on 19.12.2019 under a constitution which established the objects, powers and governance of the charity.

Trustee Induction

Trustees who are currently in post are already familiar with the practical work of the charity having been working for a member organisation. They therefore possess familiarity with the advice sector locally and/or nationally. Additionally, all new trustees will be provided with a copy of the constitution of the CIO, a strategic plan and previous minutes of trustee meetings. All trustees are encouraged to attend training related to the obligations and responsibilities of charity trustees.

Organisational Structure

ACFA: The Advice Network has a trustee board (as of 31.03.2024) of 10 members who meet quarterly and are responsible for the strategic direction and policy of the charity. Membership of the CIO is open to anyone who is interested in furthering its purposes. Usually, membership is sought by advice giving agencies working in Bristol, North Somerset, South Gloucester (BNSSG) or other surround local authority areas. There are two categories of membership: Full membership is for non-statutory, not for profit organisations who provide free social welfare advice and information – for example, advice centres, law centres and Citizens Advice services. Full members receive all member benefits and have the right to vote on ACFA business or policy, such as at ACFA meetings and at our AGM. Affiliate membership is for statutory services, private companies, educational establishments, housing associations who provide free social welfare advice and information. For example, local authority services, private practice and university student advice etc. Affiliate members receive all member benefits but do not have the right to vote on ACFA business or policy, such as at ACFA meetings and at our AGM.

Risk Management

The Trustee Board has conducted a review of the major risks to which the charity is exposed. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces. Significant external risks to sustainability have led to the development of a strategic plan that considers options for development and diversification. Internal control risks are minimised by the implementation of procedures for authorisation of transactions and projects.

The charities purpose is set out in the objects of the organisations constitution:

The promotion of the voluntary advice service sector in Bristol and the surrounding areas for the public benefit by:

- Supporting advice service organisations;
- Encouraging closer working relationship amongst all advice providing organisations;
- Sharing information with members and providing training on a range of issues including technical updates and wider social policy issues;
- Representing the advice sector in Bristol to external bodies and in both local and national issues.

The focus of our work

ACFA is not just for specialist organisations that provide advice to the public on social welfare law issues; it is for all voluntary sector and community organisations

that provide advice, information and/or support. We are keen to ensure that organisations work together effectively to ensure people get the help they need, when they need it. Our mission is to work in partnership to combat poverty and promote social justice by improving the quality & provision of free, independent advice. ACFA supports advice agencies based in and around Bristol who provide free, independent and confidential advice services. Individually and collectively, ACFA members will be more effective and efficient in order to provide great advice services. Activities ACFA has five key priorities that have guided its activity throughout the year:

One: Voice

We represent and express the collective views and opinions of the advice sector on matters that are important to them and promote the advice sector to a wide audience.

Two: Sustainability

We work towards ensuring that the advice sector and ACFA enjoy a sustainable future.

Three: Partnership

We encourage and facilitate a collaborative and strategic approach to the funding and delivery of advice services and provide a platform for sharing best practice, exchanging information, knowledge and experience.

Four: Evidence

We facilitate the collating of evidence which illustrates the impact advice has on the communities we serve and the social policy issues the sector has identified through its work. Five: Support

We provide resources and services that help member agencies deliver high quality advice services, and enable sector wide support for common goals.

Main Achievements of 2023/24

In early 2023, we secured funding through the Quartet Community Foundation for an ACFA part time administrator, hosted at Housing Matters, and a Strategic Lead, hosted by Bristol Law Centre. The Strategic lead has helped give 'One Voice' to the ACFA membership. This specifically during the formation of the BNSSG VCSE alliance on which the advice sector now has a seat at the table, and at health-related forums and steering groups e.g. Integrated Care Partnerships and/or Boards across the BNSSG.

Household Support Fund: In the summer of 2023, the Bristol Advice Partnership and ACFA Trustees were approached by the Department of Work and Pensions and Bristol City Council Community Teams with a funding opportunity linked to the Government's wider Household Support Fund. After months of planning, we negotiated a £400k grant to be distributed to 14 ACFA membership agencies to deliver advice, support and information services over a 6 month period to support people across Bristol who were most at risk of poverty and deprivation due to the cost of living crisis. This work included advice and information drop ins in key community hubs in East, North, South and Central Bristol. As well as organisations being able to take on more complex casework and emergency funds to support people in high levels of deprivation.

Frontline Workers – networking opportunities: After key conversations at our members meetings, it became apparent that although the leadership of each advice agency felt well connected, frontline workers e.g. advisers, support workers and volunteers felt less connected to one another. We created two opportunities in the year, September 2023 and January 2024, to bring together frontline workers from different agencies, to meet, connect, and share knowledge about their services. These proved popular with around 50 people at each event with resounding positive feedback from attendees.

We hope to run events similar to this in 2024/25 and act on some of their feedback regarding setting up an online group to have live frontline worker updates e.g. available appointments and changes to service delivery and/or capacity at different agencies.

Regular Members meetings: We have continued to run bimonthly members meetings with good attendance from across the membership. We requested recommendations and suggestions for guest speakers across the year including: a specialist on maximising recruitment success in the advice sector, Advice UK on upcoming advice related campaigns, and Clarion Housing on bespoke employment support services available to all advice clients.

Plans for 2024/25

After a year of focusing on reconnection of advice agencies and assessing our overall post pandemic service deliveries we're looking forward to a year of pursuing more collaborative work. Key objectives for the year ahead include:

- Securing continuation of funding for ACFA to extend administrative and strategic work.
- Reviewing the ACFA Strategy, led by ACFA Strategic Lead, Jane Emanuel and supported by the Trustees and wider membership.
- Secure a 6-month extension of the Household Support Fund.

- Offer and deliver training sessions on specialist subjects e.g. Welfare Benefits (Full day updaters course).

Sources of funds

ACFA's income is predominantly self-generated via membership and training fees.

Investment Policy

The charity has maintained a prudent amount in its reserves each year and have previously not invested surplus cash. Trustees are currently reviewing whether there are any suitable opportunities for investment of cash balances held.

Public Benefit

The Trustees have had due regard to the Charity Commission guidance on public benefit in deciding what activities the organisation should undertake and confirm that all the organisation's activities are undertaken to further our charitable purposes for the public benefit.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name

ACFA: The Advice Network

No (if any)

1187070

Receipts and payments accounts

CC16a

For the period
from

Period start date

01/04/2023

To

Period end date

31/03/2024

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Savings interest	99	-	-	99	34
Easy Fundraising	18	-	-	18	22
Training Income	1,205	-	-	1,205	660
Membership Fees	1,621	-	-	1,621	1,927
Grants	20,675	-	-	20,675	-
	-	-	-	-	-
Sub total (Gross income for AR)	23,618	-	-	23,618	2,643
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	23,618	-	-	23,618	2,643
A3 Payments					
Policy Library updates	1,200	-	-	1,200	1,200
Payment Processing charges	-	-	-	-	101
Website Design & Maintenance	1,378	-	-	1,378	1,796
Software	125	-	-	125	-
Training Expenses	-	-	-	-	1,350
Publicity	-	-	-	-	-
Meeting Costs	981	-	-	981	719
Honorariums	7,227	-	-	7,227	-
Overheads (Bristol Law Centre)	3,128	-	-	3,128	-
Overheads (Housing Matters)	1,987	-	-	1,987	33
Membership refunds	-	-	-	-	-
Sub total	16,026	-	-	16,026	5,197
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	16,026	-	-	16,026	5,197
Net of receipts/(payments)	7,592	-	-	7,592	2,555
A5 Transfers between funds				-	-
A6 Cash funds last year end	8,680	-	-	8,680	11,135
Cash funds this year end	16,272	-	-	16,272	8,680

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Current Account Balance	1,773	-	-
	Savings Account Balance	6,166	-	-
	Bristol Law Centre	8,333	-	-
	Total cash funds	16,272	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Robert France	13.12.24
 2	Katherine Tanko	17/12/2024