



asc access
social care



Access Social Care

ANNUAL REPORT

April 2022- March 2023

Charity Registration: 1186714

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A note from our Chair



Access Social Care started operating at the start of the first pandemic lockdown in April 2020. Now, at the time of writing, the country is gripped by a cost-of-living crisis alongside a social care workforce crisis.

With more than half a million people on a waiting list just to get a social care assessment¹ and 2.6 million people over 50 with an unmet care need², our work has never been more needed.

We continue to rise to the challenge in this uncertain financial climate, transitioning from a start-up to a more established organisation. We have had success growing our impact with our award winning chatbot, by enabling local citizens in our place-based Hubs who need early legal support, to use the chatbot to secure assessments, fair social care charging, and adequate social care provision; and using chatbot data to influence local authorities to change their policies and practices.

Our expertise has protected clients' wellbeing by preventing unlawful reductions in 1:1 support hours which in one case the local authority wanted to halve. We supported the family with legal advice which led to the Council not proceeding with this planned cut.

Too often, barriers to adequate and appropriate social care mean our clients and their loved ones experience unimaginable hardships. Our extraordinary colleagues so often go over and above to ensure people with social care needs get the right support, and I would like to thank them for the profound difference they make to people's lives.

Thanks also to our funders and partners for the support you provide to make our work possible.

A handwritten signature in blue ink that reads 'Janine Tregelles'.

Janine Tregelles CBE
Chair of the Board of Trustees

¹ Statistic from [ADASS Waiting for Care Report](#)

² Statistic from [Age UK for the Care and Support Alliance](#)

What we do and why we exist

Every day millions of older and disabled people are denied the social care they need. Most local authorities can't meet the growing demand for care, and none are confident they can meet their legal duties in the future. This affects all of us; we will all need social care at some point in our lives either for ourselves or a loved one.

We all have a right to hold public bodies to account, but most of us cannot afford lawyers so rely on legal aid. The 92% drop in legal aid cases since 2010 means that we have nowhere to turn.

Without access to justice, our rights do not exist. The rule of law is broken.

ASC is a specialist health and social care rights advice organisation. We work with communities to increase knowledge of the law and our rights. We collaborate with social services whilst ensuring legal obligations are met. With a 98% success rate, our teams of lawyers ensure fair access to justice when things go wrong. We are working towards a future where social care is adequately funded and we all get the support we need.

Our strategy

Our vision is for people to get the health and social care support they need to live fulfilled lives.

Our mission is for ASC to be the leading specialist health and social care legal advice provider. We collaborate, educate and challenge to drive system change and ensure rights are met.

IMPACT PRIORITIES

We Empower
Communities use the law early on to get better outcomes

We Enforce
People get early legal advice and support when they need it

We drive SystemChange
We use data to challenge persuade and influence to improve quality, policy and practice locally and nationally

ENABLING PRIORITIES

We use Technology
We innovate and use technology to increase efficiency and impact

We value our People
Our People strategy protects the social care law career pathway and ensures ASC is the best place to work

We generate Income
Our diverse income streams grow to support increased impact

Our values

At ASC, we are...

Trustworthy	<ul style="list-style-type: none">• Recognised for excellence, we will be the best we can be in everything we do. We will be truthful, independent and outcomes focussed.
Fair	<ul style="list-style-type: none">• We believe in treating people with kindness and compassion in a way that is right, reasonable, and just.
Fearless	<ul style="list-style-type: none">• We will do what is right, not what is easy. We will bravely challenge injustice.
Inclusive	<ul style="list-style-type: none">• Our beneficiaries' voices will influence our thinking and decision making at all levels of our organisation. Collaborative in our thinking, we will work with others to achieve our goals.
Positive	<ul style="list-style-type: none">• We will be constructive and progressive in our challenge. We will optimistically and dynamically drive for change

Our approach – managing conflict and living to our values

Our purpose is to improve the lives of people with social care needs. Our approach is to do this by collaborating with all parts of the system. We know that whilst we positively and constructively challenge public bodies through our casework, we can still work with leaders from public bodies to drive improvements to policy and practice.

Occasionally in the course of our work with our members - some of whom are social care providers - we come across pockets of poor practice, unlawful behaviours, safeguarding or human rights concerns. When this occurs, we live to our values; we fearlessly do what is right not what is easy, challenging injustice and driving for change. We are firm throughout the life of our relationship with our members that we only work with providers who are willing to engage with us, as human rights and specialist community care lawyers at an Executive and Leadership level, to secure continuous improvements to their services. We feel so strongly about this approach it is built into our contract.

To help us with design, delivery and decision making we work with experts by experience, ensuring our work is informed by the voices of the people our charity exists to serve. Our advisory panels and community partners support with this work.

About social care

We all know someone who relies on social care to live in dignity, to make life choices, or to live safely in their own home, in a care home, or in the community. That might be a parent or a grandparent with dementia, a child or a sibling with a learning disability, or a friend with a mental health issue. By the time we are of pension age, half of us will be disabled. We will all need social care at some point, either for ourselves or for a loved one.

If done well, social care can change lives for the better. But every day millions of older and disabled people are denied the social care they need and have a right to. Most local authorities can't meet growing demand: 94% say they don't have the funding or workforce to meet their legal duties to provide care³.

Sometimes the problem is no support – We helped a 90-year-old with dementia who needed prompting to ensure she remembered to wash, dress and feed herself. Because she was physically able the authorities said she didn't need any help. She was left hungry in soiled clothing.

Sometimes it's the wrong support - Like the 18 year who had to give up her degree because she was trapped in hospital for 18 months when all she needed to go home was an accessible bathroom.

Sometimes the support comes too late – We helped a 15-year-old who just needed a few hours of help a week but instead ended up in an inpatient mental health unit, over-medicated and restrained, hundreds of miles away from his mum and dad.

The impact of COVID-19 and the cost-of-living crisis

Pre-pandemic, social care was already on a financial knife edge. The pandemic caused demand for social care to increase. The cost-of-living crisis is now pushing cash strapped local authorities - and the people that rely on them for support - to the precipice.

Local authorities are sounding the alarm that 430,000 people are on waiting lists just to get a social care assessment.⁴ And a helpline data project led by us here at ASC has shown that there was a 400% increase in carers calling helplines during the pandemic. As we emerged from lockdown, call volumes remained around twice as high as pre-pandemic levels⁵. This new wave of advice seekers comprises of people already in the system who have been holding back new referrals due to lockdown, as well as a whole new group of people entering crisis.

The demand for social care advice is unprecedented. But while legal interventions can save lives, **71% of the population of England and Wales do not have access to a community care legal aid provider**⁶. Access Social Care needs to expand to meet the demand from new people requiring our support.



³ Statistic from [ADASS Spring Survey 2023](#)

⁴ Statistic from [ADASS Waiting for Care Report](#)

⁵ Statistic from our [State of the Nation report 2022](#)

⁶ Statistic from [data analysed by The Law Society](#)

Our products and services

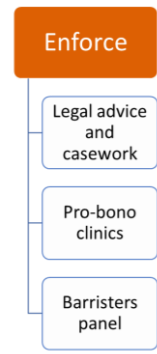
Our membership model

ASC links its specialist community care law expertise to social care providers, helplines, community-based organisations, and the people they serve through a membership model. Members pay subscriptions linked to the level of service they wish to acquire. Our membership model has 3 main types of activity aligned with our 3 impact priorities:



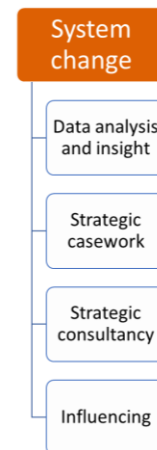
Empower

We build relationships to increase knowledge of rights and improve legal capability and confidence. Our legal education ensures care and support staff, managers, families, and people with support needs, feel confident using legal language to improve decision making and know how and when to seek advice when things go wrong.



Enforce

We ensure more people access legal help to solve problems early on. We know that with just a few letters from us, we can transform outcomes and make sure people with social care needs get the care and support they have a right to.



Challenge

We achieve system change, working with public body decision makers to improve quality, policy and practice. We collect and analyse data to spot trends and use strategic casework and influencing to persuade and challenge, securing improved decision making and changes to the design and implementation of policy, guidance, and regulations.

This year we worked with the following member organisations:

Achieve Together, Avenues, Camphill Village Trust, Choice Support, Croydon Mencap, Dimensions, Discovery, Ealing Consortium, Father Hudson's Care, HFT, Lifeways, MacIntyre, Mencap, Norwood, Sense, United Response, and Wirral Mencap.

Our community work

Our membership model works well for people who are connected to a large social care provider. However, smaller community-based and user-led organisations working with people experiencing intersectionality and multiple barriers to accessing advice and quality social care can struggle to afford our fees.

We know that disabled people, Black, Asian, minority ethnic, and some religious communities, experience worse health and social care outcomes than the general population. Free legal advice has been proven to improve health outcomes⁷, so at Access Social Care we feel it is critical that we work alongside communities that have experienced disadvantage.



We work at the intersections of health and social care to ensure improved flow between social care and health, and have adapted to work in a place-based and community-led way. In 2023 we have linked to social care experts by experience through our partner Social Care Futures. In Gloucestershire, Croydon, Lambeth, Lewisham and Harlesden, we are connecting our service to Black and Asian communities, a disabled person led organisation, and a family carer led organisation. We are also connecting to community groups working in some of the most economically deprived postcodes. Gloucestershire is our flagship community hub. Our partnerships with Barnwood Trust, Friendship Café, and Inclusion Gloucestershire in particular have led to learning and networks that have supported the growth of our work in the county as well as informed work in other hubs.

Learning from our partnership in Croydon Social Prescribers, we have expanded our secondee programme in 2022/23. We are seconding employees from our partners Social Care Futures, Black Thrive and Friendship Café into Access Social Care. We work with secondees to share learning about how we use the law to improve outcomes for people with social care needs, and to learn how our partners work in a culturally appropriate way with their networks.



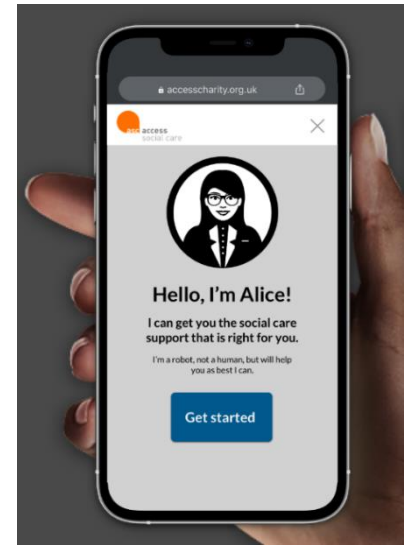
We co-produce legal education programmes and our secondees ripple knowledge out into their communities to improve knowledge of rights and confidence around using the law and legal language. By encouraging communities and community leaders to use our chatbot we are ensuring the quality of advice whilst harvesting data which can then be given back to communities. This helps them see trends in advice seeking behaviours which may indicate problems with policy and practice in their area. Communities can then use this data to work alongside public body decision makers to improve quality.

⁷ See [Professor Dame Hazel Genn's article on the health benefits of free legal advice.](#)

Our chatbot

We are a small organisation, but the demand for specialist advice is huge and growing. To complement our human advice and to help us reach more people, we have invented a legal information chatbot designed to support care workers, unpaid carers and people with social care needs.

Available 24/7 via our website, the chatbot answers legal questions and helps advice seekers draft personalised legal letters to send to public bodies, ensuring rights are met. Importantly, the chatbot also harvests thematic and demographic data which we use to inform evidence-based influencing work and strategic casework.



Content currently available on the chatbot includes:

- Getting care and support, including: getting an assessment, eligibility, and getting care after a hospital stay.
- Problems with care and support, including: delays in getting a care plan, cuts to care and support, dealing with inadequate care and support, and problems with direct payments.
- Charging, including: problems with charging and disability related expenses
- Continuing Healthcare, including: assessments, eligibility, and dealing with Continuing Healthcare problems.
- Carers' rights, including: getting support as a carer, getting alternative support in place when a carer cannot provide care, and ending a caring role.

This year we secured funding to grow our in-house tech team to help us transition towards becoming a product developer. We are excited that the team have transitioned to an agile working pattern, enabling us to rapidly respond to the needs of chatbot users, customers and the needs of our organisation.

Over the past year we successfully developed a software as a service platform and licensed the chatbot to 4 partner organisations so they could host the chatbot on their websites. This work means that the chatbot will be available to more people.



We are proud that this work carried out together with our digital partner Springbok Ai in 2022/23 was recently awarded the "[Best Digital Innovation](#)" category at the Third Sector Business Charity Awards.

Our impact

We empower

- We have built knowledge and confidence in using the law by:
 - Training 540 staff at member organisations through 66 training sessions, with participants reporting a 35% increase in confidence and knowledge.
 - Running 7 Rights Champions update sessions, reporting on new legal developments, allowing Rights Champions to share best practice, and more.
 - Delivering 35 training sessions through our Hubs, with participants reporting on average a 32% increase in knowledge and 28% increase in confidence to challenge.
- We have promoted the use of our legal advice chatbot to:
540 staff from member organisations; 41 staff from pilot organisations; 25 stakeholders from pilot organisations; 5 staff from funder organisations; and 383 people through our Hubs. At one of these training sessions, which was for parents of disabled young people aged 17-25, none had been given any information about adult social care processes. Following the training course one parent said "useful knowledge, and knowledge is power".
- While data gathering was interrupted by the development of our new platform, we are able to estimate from previous data sets that the number of chatbot conversations was approximately 1,850 on the ASC chatbot. Chatbot users report that using personalised legal letters from the chatbot has helped secure social care assessments, lawful social care charging and appropriate social care support.

For example:

M was referred to us by an NHS Social Prescribing Link Worker from Croydon North Primary Care Network. She has been diagnosed with Functional Chronic Pain and cannot walk without support. M lives on the second floor with 5 flights of stairs and there is no lift, so she is unable to leave her home. She needs help with cooking, cleaning, shopping and showering, relying on friends and her mum. She received 6 weeks of support from the British Red Cross, and was placed on a long waiting list for Croydon Adult Support.

M's case still hadn't progressed until the Social Prescriber, who had been recently been trained on the Care Act and our free Legal Chatbot by our Senior Advice Co-ordinator Jennine Bailey, referred her to our free legal clinic. Our legal volunteer completed a letter to Croydon Council with M within a week, which was sent to adult social services. After two weeks, M informed us that she had had an assessment, and was waiting to hear back from Croydon Council. Social Services have now done the assessment, after which the panel offered M 9 hours of social care support. She was then given advice by the volunteer regarding how she could address her accommodation issues.

M was really happy with the support provided by Access Social Care. She felt "very grateful with the letter that was completed as it sped the whole process up with Social Services". M contacted us again to follow-up on the letter and was really happy with the advice she received.

We enforce

- Our in-house legal team have worked on 505 legal cases this year, including 355 level 1 / initial advice pieces, 27 level 2 cases, 74 level 3 cases and 49 level 4 / pro bono cases.⁸
- Our pro-bono clinics worked on 49 cases.

For example:



Paul

Paul may be smiling because he's happy in what he regards as his second home, St Catherine's. Staff at St Catherine's may be smiling because, with the help of ASC, we know that we can now afford to continue to provide the level of care he needs in order for him to be happy and content. As CEO of Father Hudson's Care, the organisation to which St Catherine's belongs, I too am smiling because I now know that this service has a future, and that other adults with complex needs and their families will be able to come to us knowing that their family member can live here for decades, safely and well cared for.

There is no doubt in my mind that becoming involved with ASC has been one of the most important contributions to the sustainability of our services for adults with complex needs. By working with the individual and their family it has been possible to challenge the extremely low fees that some Local Authorities have been paying for many years.

Whilst we have challenged this in the past ourselves, and on occasion successfully, in a number of instances our challenges have not brought about the necessary funding changes for those already in our care. What ASC have brought is a very professional, rational and balanced approach, underpinned by the Care Act. They have also empowered our Care Managers and families to understand the Care Act much better, and enhanced their ability to use the authority of this Act for the benefit of the individual and their families.

Paul's care had been underpaid for many years. Through the work of the family's ASC-assigned representative, Julie Hinnigan, the Local Authority finally agreed to double this amount going forward and to also provide a certain amount of back pay. I have to say that the Local Authority when approached in this way did react fairly, and reasonably quickly. This has not been and still is not our experience generally, but it needs to become the norm. If it does not then charities like ours will find the whole situation unsustainable. Our aim is not to make a profit - our aim is to have sufficient funding to provide the care and the quality of care that is needed. It was necessary for us to engage ASC on behalf of the families because it is known by the parties involved that as a charity Father Hudson's Care would neither reduce the care needed by Paul so that it matched the fee that was being provided, nor would it make someone leave St Catherine's who had been with us for many years and for whom this was their second home.

I mention ASC's support for adults with complex needs, but I have to add that their guidance regarding Local Authority support for our residents and would-be residents in our Care Home for older people, many of whom have dementia, has been an unexpected but very beneficial additional support.

- Andrew Quinn, CEO of Father Hudson's Care

⁸ This includes cases opened within the financial year, and cases already open on 01.04.22 with continued work into the year.



Lucy's grandson

“My daughter who has autism spent fifteen wasted years in hospital. The support from Access Social Care charity was instrumental in her discharge with a full support package. We are so very grateful for their advice, and legal and family support. My daughter for the last two years has lived successfully in the community, and in March 2023 fulfilled her dream when she gave birth to a beautiful baby boy.”

- Lucy was a client we supported, funded by our partner Mencap.

We drive system change

- Our work in Gloucestershire has contributed to a change of policy around the advice provided to people with social care needs seeking an assessment. Healthwatch Gloucestershire has chosen the social care assessment process as their next survey topic as a result of our training.
- Our work on the community care law career pathway has contributed towards proposed Legal Aid Agency changes in the supervisory requirements for community care legal aid. We hope that this will lead to more legal aid providers being able to hold a community care law contract.
- ASC are working to increase transparency about how spending decisions are made on social care within central government and how equalities information is gathered, collected and analysed. We are continuing to work with the Information Commissioner's Office (ICO) as they investigate His Majesty's Treasury and the Department for Levelling Up, Housing and Communities. We hope that this will lead to the social care sector being able to engage more with the decision making process which will in turn lead to better decision making and more transparency in central government.
- Too many social care providers are not adequately funded to meet the needs of the people living in their services. The combined impact of the cost-of-living crisis and the social care workforce crisis has compounded this issue, leaving many social care providers with little choice but to hand back contracts. For people who have lived for years with the same social care provider and staff team, this can be devastating. Working with our member organisations we have been providing training and supporting social care providers to take an individualised approach to securing fee uplifts, ensuring people with social care needs receive appropriate support and are able to stay in their homes.

- We have collaborated with national press to raise awareness on cases we have worked on and the wider issues they represent, including articles about our Transforming Care work in the [Daily Mail](#) and [The Times](#).
- This year we launched the [State of Our Nation podcast](#), inviting experts, leaders and change-makers to raise awareness of the highs and lows in the adult social care system. We launched 6 episodes this year.

We use technology

Our chatbot project is going from strength to strength. While data gathering was interrupted by the development of our new platform, we are able to estimate from previous data sets that the number of chatbot conversations this year was approximately 1,850 on the ASC chatbot.

We have now recruited a tech team to support ASC's transition to becoming a product developer. We have also partnered with Asian People Disability Association, BME Forum Croydon, Ealing Mencap and the National Autistic Society to licence our chatbot so that it appears on our partners' websites. We also have two further partners joining soon that have signed our partnership agreement – Choice Support and Crossroads Care Gloucestershire. Licensing the chatbot ensures that more people will access the technology to learn about and to secure their rights to social care.



“The chatbot function is a very effective tool for our website users, and this now enables a lot more people to get social care advice quickly and clearly once they navigate the process online. We are happy to be part of this exciting new project and very pleased to be working with Miriam, Fin and their team at Access Social Care to enable APDA to be reaching and helping more people in our community.”

- Zeenat Jeewa, CEO of Asian People's Disability Alliance

We value our people

- Recognising the national shortage of community care lawyers, we started working on a career pathway project to look at improving recruitment and retention of specialist lawyers working in the field.
- [Episode 6 of our State of Our Nation podcast](#) discussed the social care workforce crisis with Kirstie Jones (Group People Director at Saludem Care) and Christoph Marr (Managing Director at Marr Procurement), raising awareness of recruitment and retention issues in the sector.

Our people

Our Staff

The last quarter of 2022/23 was a challenging time for our staff team, with an unprecedented number of Access Social Care employees experiencing significant and difficult life events. We have worked hard to support the wellbeing of our teams throughout this time, piloting team counselling and employee wellbeing funds. We have grown our staff team in 2022/23 to 35 people, but with a significant proportion of part time staff. We are proud that our staff tell us in staff surveys that we live to our values, while taking on feedback and making continuous improvements as we grow to ensure that ASC continues to be the best place to work.



Our volunteers

ASC 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

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

We are also grateful to our team of Rights Champions and experts by experience who provide consultancy to develop our work and spread the word about the use of the law in their communities.

Our funders

We are grateful to our many funders who have partnered with us to increase our impact:

- Oak Foundation
- Barnwood Trust
- Esmee Fairbairn
- Pears Foundation
- AB Charitable trust
- Unltd
- Access to Justice Foundation
- Legal Education Foundation
- Caretech Foundation
- Disrupt Foundation
- Fidelity Foundation
- Rangoonwala Foundation
- Britford Trust
- Renishaw Foundation
- Dulverton
- Benita Rayne Family Trust
- Baring Foundation
- The Barratt Foundation
- David Solomons
- The Grace Trust
- Garfield Weston

Our pro-bono partners

We would like to extend our thanks to our pro-bono partners:

- Baker McKenzie, Fieldfisher, Slaughter and May, Orrick have all supported us with clinics. Shearman and Sterling and Allen and Overy have supported us with one-off support on cases.
- Travers Smith, Fieldfisher, Anthony Collins and Baker Mckenzie have supported us with corporate advice.
- Pears Foundation, Doughty Street Chambers, 39 Essex Chambers, Browne Jacobsen, Mencap and Fieldfisher have provided us with free use of their rooms.

Looking forwards to 23/24 and beyond

Career Pathway Project



Community care specialist lawyers underpin all of our workstreams. The national shortage of community care lawyers is affecting our ability to grow and reach more people. We want to build out a career pathway project over the next 5 years to prevent the extinction of community care law, improving awareness of community care law as a possible career and improving recruitment and retention both within Access Social Care and across the wider sector. We hope this will enable us to continue to grow our membership and expand the provision of specialist community care advice.

Chatbot project



We will complete our chatbot licensing pilot in 23/24 and will look to expand our chatbot partners, hosting the chatbot on more websites, reaching more people and gathering more data about problems with access to social care. We will pilot working with university pro-bono clinics to encourage use of the chatbot.

Measurement, Evaluation and Improvement



We have been building relationships with the Health and Social Equity Collective at Kings College London. This partnership has led to the recruitment of two Master's students to evaluate the impact of our work, and we are seeking funding for a post doctorate researcher to work alongside our frontline teams to measure, evaluate, learn and iteratively improve our work with communities to reduce health and social care inequalities.

Our governance and management

ASC follows the Charity Commission's best practice guidance on recruitment and induction of new trustees. Skills gaps relevant to the strategic objectives of the charity are identified by the Board by way of informal audit (last conducted in Spring 2023). These are addressed through the recruitment of new trustees. Potential trustees submit a CV and covering letter, and meet the Chief Executive Officer (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 CBE – 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 ongoing.

If the Charitable Incorporated Organisation (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 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.

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
- Travers Smith - legal advice, 10 Snow Hill, London EC1A 2AL
- Anthony Collins - legal advice, 134 Edmund St, Birmingham B3 2ES
- Baker Mckenzie - legal advice, 100 New Bridge St, London EC4V 6JA
- Fieldfisher– Legal advice Riverbank House, 2 Swan Lane, London, EC4R 3TT
- The Co-Operative Bank, 118-120 Colmore Row, Birmingham, B3-3B

Financial Review

Going Concern Statement

ASC is still a relatively new charity and our experience of the last few years from our incorporation leaves us well-placed to manage the risk that 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 ASC's financial performance, the reserves position, and principal risks and uncertainties. Notwithstanding the ongoing pressures on fundraising, our performance to date has been robust in terms of income generation and ASC has remained firmly in control of its service quality and financial performance throughout the operating period.

As we have grown as an organisation, we have developed our financial management, budgeting and reporting processes to ensure that controls are robust and information is up to date and supports decision making. We have appointed a new Head of Finance to take this work to the next level as we seek to grow further.

The 2023/24 budget has been approved by the ASC Board. 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". ASC'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 social care needs 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 this has on those using our services, as well as the wider impact on society.

Income

Our total income for the year to 31.3.2023 was £1,669k. Although this was flat when compared with last year (y/e 31.3.22 £1,679k), the prior year figure was inflated by a very late receipt of grant

funding (£410k) which was utilised in the current financial period. After accounting for this, our income has increased both in size and diversity with a range of new funding partners supporting us.

Our largest funder remains Oak Foundation (£457k, FY22: £845k) but we have also secured significant (>£100k) support from Disrupt Foundation, Fidelity Fund and Esmee Fairbairn Foundation. In addition to these trusts and foundations, income from our memberships exceeded £400k (FY22: £320k).

Expenditure

Total expenditure in the reporting period was £1,523k, a 31% increase on the prior year (£1,161k). The majority of our expenditure is on staff and this area was responsible for vast majority of the increase, from £903k to £1,213k reflecting an investment in professionalising the organisation bringing key skills into HR and particularly to boost the development of our chatbot as well as an increase in our frontline legal team. In addition, we spent £87k in amortising our chatbot.

Capital Expenditure

Spend on further development of the chatbot this year was £195,649 – this amount has been capitalised and does not appear in our expenditure in the Statement of Financial Activities (SOFA). Towards the end of the reporting year we launched a pilot programme, building the chatbot into partner websites to support testing. This process will lead to further development in the coming year which we will continue to capitalise until development is substantially complete.

Funds Analysis

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.

Of the charity's £1,303k total funds at the end of March 2023, £592k are restricted funds that are committed to future expenditure and not available for general purposes.

We hold £397k in designated funds to cover the amortisation of our intangible asset, the chatbot. These funds result from cash expenditure on development which were not expensed at the point of purchase in the SOFA. Instead these funds will be used to cover future amortisation costs and therefore will be released to the SOFA in future years.

Our free reserves are £314k (FY22: £477k). Free 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 Policy

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. Our reserves as at 31.3.23 are £314k, this does not yet meet our target reserves of £745k (6 months operating costs).

We recognise that 6 months is generous provision, but we consider it necessary because there is a national shortage of community care lawyers and the legal casework we conduct could not be referred out. We therefore need to have enough reserves to enable us to close off our casework in an orderly fashion, to protect the interests of our clients should ASC be required to wind up operations.

From the outset, the Trustees have set a conservative reserves policy recognising that ASC is a charity in its infancy and that our sources of funding can fluctuate. We recognise that we have more to do to meet the policy. Our budget for next year includes further growth and we will balance the need to deliver on our strategic objectives with increasing our reserves.

Risks

ASC 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 Risk	Background	Our Mitigation Strategy
Not being successful in raising new income as ASC expands	The ongoing cost of living crisis which has affected organisations as well as individuals and the continuing lack of funding for social care make the job of fundraising incredibly challenging.	We have recruited a Head of Business Development to drive our membership and chatbot income. We continue to research all available sources of funding from trusts and foundations. In addition, we will explore new funding models such as social investment to see if they can support our impact aims and they are right for our charity.
Failure to recruit, retain and develop key staff leading to delivery and operational issues	There are very few specialists remaining in community care but there is also a wider issue in finding talented individuals across other departments as a small organisation	We are working on a career pathway for community care specialists, partnering with universities to build a healthy pipeline. We have recruited an HR professional who will support our recruitment, retention and wellbeing programmes.
Ensuring that we comply with our organisational duties on safeguarding	It is incredibly important to us that we have high standards in this area and we have undertaken a safeguarding deep dive in partnership with our board over the last 6 months	Safeguarding policy redrafted. We have established a Designated Safeguarding Lead (DSL) and we will monitor and report on our practice as we go forward, offering support to our team to ensure they have everything they need.

Fundraising

ASC continues to operate with a small fundraising team supported and managed by the Director of Partners & Engagement and includes a part-time Senior Fundraiser and Prospect Researcher and a full-time Junior Fundraiser. The team relies on input from the CEO and operational teams to provide accurate and relevant content for proposals and reporting. CEO and/or Exec members sign off applications over the value of £100k.

Grant giving has remained the main source of income for fundraising, although the landscape for fundraising with Trusts and Foundations is proving challenging. A combination of factors such as: economic climate, strategy re-focus on marginalised and racialised communities, funder partnering or closing their application process to seek out charities that funders choose to support, as well as funders reporting being overwhelmed with applications, has proven difficult for traditional pipeline fundraising in this area. Grant giving at ASC has been successful to date, however pipeline conversion ratios dipped this year and are showing little or no opportunity to continue to grow beyond the status quo. The team has strengthened its approach to maintaining and retention of grants and cultivating relationships with grant givers who are invested in supporting the work of the charity. The team managed 15 live grants, requiring reporting, finances, cultivation, and stewardship, as well as continuing to research and apply to funds that align closely with ASC's vision, mission, and values.

Other areas of Fundraising include:

- **Individual Giving** – This is an area that is slowly on the rise at ASC. As the charity's stakeholders and brand awareness begin to grow, the team has started to maximise opportunities for engagement with stakeholders and segment communication to 'opted-in' individuals, with a view to maintaining existing and growing new individual givers.
- **Major Donors** – ASC are supported by a small Development Board to help grow our networks with influential, well-networked, and/or wealthy individuals that have an interest in supporting our work. ASC currently has one major donor, supporting the charity's work in wellbeing for the Legal Team.

What's next?

ASC's Fundraising Team are committed to monitoring fundraising trends through publications, webinars, and peer connections. There are some areas for opportunity that the team has been scoping this year, with planned in activity to begin to support over the coming year, including; Individual Giving and Legacy fundraising. Both will take time to build but are a worthy investment of staff time to support an opportunity for a new source of income. Our main focus for the team remains on grant fundraising.

Access Your Right To Care

Statement of responsibilities of the trustees

For the year ended 31 March 2023

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.

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.

Auditors

Godfrey Wilson Limited were re-appointed as auditors to the charity during the period and have expressed their willingness to continue in that capacity.

Approved by the trustees on 10 October 2023 and signed on their behalf by

Janine Tregelles

Janine Tregelles - Chair

Access Your Right To Care

Reference and administrative details

For the year ended 31 March 2023

Charity number	1186714																		
Registered office	Coventry Law Centre Ltd Oakwood House Cheylesmore Coventry CV1 2HL																		
Trustees	<p>The trustees who served during the period and up to the date of this report were as follows:</p> <table><tr><td>Christopher Hale</td><td></td></tr><tr><td>Rhoda Iranloye</td><td>appointed 12 July 2022</td></tr><tr><td>Kevin McGuirk</td><td></td></tr><tr><td>Rebecca Mills</td><td>resigned 3 May 2022</td></tr><tr><td>Linda Redford</td><td></td></tr><tr><td>Joyce Sarpong</td><td>appointed 12 July 2022</td></tr><tr><td>Janine Tregelles</td><td></td></tr><tr><td>Robbie Turner</td><td>appointed 12 July 2022</td></tr></table>	Christopher Hale		Rhoda Iranloye	appointed 12 July 2022	Kevin McGuirk		Rebecca Mills	resigned 3 May 2022	Linda Redford		Joyce Sarpong	appointed 12 July 2022	Janine Tregelles		Robbie Turner	appointed 12 July 2022		
Christopher Hale																			
Rhoda Iranloye	appointed 12 July 2022																		
Kevin McGuirk																			
Rebecca Mills	resigned 3 May 2022																		
Linda Redford																			
Joyce Sarpong	appointed 12 July 2022																		
Janine Tregelles																			
Robbie Turner	appointed 12 July 2022																		
Chief executive officer	Kari Gerstheimer																		
Senior management team	<table><tr><td>Joanne Williams</td><td>Director of Fundraising & Communications</td></tr><tr><td>Lainey Gough</td><td>Director of Operations and Impact (resigned May 2023)</td></tr><tr><td>Catriona Filmer</td><td>Head of Legal (resigned December 2022)</td></tr><tr><td>Miriam Valencia</td><td>Head of Operations</td></tr><tr><td>Hannah Hewish</td><td>Legal Strategy Manager</td></tr><tr><td>Anna Gaughan</td><td>Head of Community (resigned December 2022)</td></tr><tr><td>Alan Bird</td><td>Chief Technology Officer (appointed November 2022)</td></tr><tr><td>Pauline Gayle</td><td>People Director (appointed September 2022)</td></tr><tr><td>Peter Stimpson</td><td>Head of Finance (appointed April 2023)</td></tr></table>	Joanne Williams	Director of Fundraising & Communications	Lainey Gough	Director of Operations and Impact (resigned May 2023)	Catriona Filmer	Head of Legal (resigned December 2022)	Miriam Valencia	Head of Operations	Hannah Hewish	Legal Strategy Manager	Anna Gaughan	Head of Community (resigned December 2022)	Alan Bird	Chief Technology Officer (appointed November 2022)	Pauline Gayle	People Director (appointed September 2022)	Peter Stimpson	Head of Finance (appointed April 2023)
Joanne Williams	Director of Fundraising & Communications																		
Lainey Gough	Director of Operations and Impact (resigned May 2023)																		
Catriona Filmer	Head of Legal (resigned December 2022)																		
Miriam Valencia	Head of Operations																		
Hannah Hewish	Legal Strategy Manager																		
Anna Gaughan	Head of Community (resigned December 2022)																		
Alan Bird	Chief Technology Officer (appointed November 2022)																		
Pauline Gayle	People Director (appointed September 2022)																		
Peter Stimpson	Head of Finance (appointed April 2023)																		
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 2023 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 2023 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.

Independent auditors' report

To the members of

Access Your Right To Care

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.

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.

Independent auditors' report

To the members of

Access Your Right To Care

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.

Independent auditors' report

To the members of

Access Your Right To Care

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.

Godfrey Wilson Limited

Date: 12 October 2023

GODFREY WILSON LIMITED

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

Access Your Right To Care

Statement of financial activities

For the year ended 31 March 2023

	Note	Restricted £	Unrestricted £	2023 Total £	2022 Total £
Income from:					
Donations	3	1,025,746	241,505	1,267,251	1,357,264
Charitable activities	4	-	400,722	400,722	322,291
Investments		-	1,163	1,163	106
Total income		<u>1,025,746</u>	<u>643,390</u>	<u>1,669,136</u>	<u>1,679,661</u>
Expenditure on:					
Raising funds		37,320	147,366	184,686	135,800
Charitable activities		<u>611,420</u>	<u>727,303</u>	<u>1,338,723</u>	<u>1,025,436</u>
Total expenditure	6	<u>648,740</u>	<u>874,669</u>	<u>1,523,409</u>	<u>1,161,236</u>
Net income / (expenditure)		377,006	(231,279)	145,727	518,425
Transfers between funds		<u>(176,755)</u>	<u>176,755</u>	<u>-</u>	<u>-</u>
Net movement in funds	7	200,251	(54,524)	145,727	518,425
Reconciliation of funds:					
Total funds brought forward		<u>391,914</u>	<u>765,874</u>	<u>1,157,788</u>	<u>639,363</u>
Total funds carried forward		<u><u>592,165</u></u>	<u><u>711,350</u></u>	<u><u>1,303,515</u></u>	<u><u>1,157,788</u></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.

Access Your Right To Care

Balance sheet

As at 31 March 2023

	Note	£	2023 £	2022 £
Fixed assets				
Intangible assets	10		<u>397,509</u>	<u>288,685</u>
Current assets				
Debtors	11	183,348		119,211
Cash at bank and in hand		<u>985,426</u>		<u>977,551</u>
		1,168,774		1,096,762
Liabilities				
Creditors: amounts falling due within 1 year	12	<u>262,768</u>		<u>227,659</u>
Net current assets			<u>906,006</u>	<u>869,103</u>
Net assets	14		<u><u>1,303,515</u></u>	<u><u>1,157,788</u></u>
Funds	15			
Restricted funds			592,165	391,914
Unrestricted funds:				
Designated funds			397,509	-
General funds			<u>313,841</u>	<u>765,874</u>
Total charity funds			<u><u>1,303,515</u></u>	<u><u>1,157,788</u></u>

Approved by the trustees on 10 October 2023 and signed on their behalf by

Janine Tregelles

Janine Tregelles - Chair

Access Your Right To Care

Statement of cash flows

For the year ended 31 March 2023

	2023 £	2022 £
Net movement in funds	145,727	518,425
Adjustments for:		
Amortisation charges	86,825	47,896
Dividends, interest and rents from investments	(1,163)	(106)
Loss / (profit) on the sale of fixed assets	-	7,397
Decrease / (increase) in debtors	(64,137)	(7,472)
Increase / (decrease) in creditors	35,109	56,783
Net cash provided by operating activities	202,361	622,923
Cash flows from investing activities:		
Dividends, interest and rents from investments	1,163	106
Purchase of intangible fixed assets	(195,649)	(193,072)
Net cash used in investing activities	(194,486)	(192,966)
Increase in cash and cash equivalents in the period	7,875	429,957
Cash and cash equivalents at the beginning of the period	977,551	547,594
Cash and cash equivalents at the end of the period	985,426	977,551

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 year ended 31 March 2023

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. 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 and 2022, 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.

Access Your Right To Care

Notes to the financial statements

For the year ended 31 March 2023

1. Accounting policies (continued)

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:

	2023	2022
Raising funds	12%	12%
Charitable activities	88%	88%

i) 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.

Amortisation is provided at rates calculated to write down the cost of each asset to its estimated residual value over its expected useful life. The amortisation process commences upon the completion of each sprint. The amortisation rate in use for ChatBot is 4 years straight line.

Access Your Right To Care

Notes to the financial statements

For the year ended 31 March 2023

1. Accounting policies (continued)

j) 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.

k) 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.

l) 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.

m) 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.

n) 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.

o) 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 determining the value of additions to capitalised intangible assets and the associated amortisation policy.

Access Your Right To Care

Notes to the financial statements

For the year ended 31 March 2023

2. Prior period comparatives: statement of financial activities

	Restricted £	Unrestricted £	2022 Total £
Income from:			
Donations and legacies	1,056,547	300,717	1,357,264
Charitable activities	-	322,291	322,291
Investments	-	106	106
Total income	<u>1,056,547</u>	<u>623,114</u>	<u>1,679,661</u>
Expenditure on:			
Raising funds	33,203	102,597	135,800
Charitable activities	<u>701,131</u>	<u>324,305</u>	<u>1,025,436</u>
Total expenditure	<u>734,334</u>	<u>426,902</u>	<u>1,161,236</u>
Net income	322,213	196,212	518,425
Transfers between funds	<u>(163,073)</u>	<u>163,073</u>	-
Net movement in funds	<u>159,140</u>	<u>359,285</u>	<u>518,425</u>

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Notes to the financial statements

For the year ended 31 March 2023

3. Income from donations

	Restricted £	Unrestricted £	2023 Total £
Oak Foundation grant	457,660	-	457,660
Trusts and foundations	565,680	209,000	774,680
Corporate donations	2,406	25,013	27,419
Individual donations	-	7,492	7,492
Total income from donations	1,025,746	241,505	1,267,251

Prior period comparative:

	Restricted £	Unrestricted £	2022 Total £
Oak Foundation grant	844,946	-	844,946
Trusts and foundations	208,934	247,979	456,913
Corporate donations	-	39,018	39,018
Individual donations	2,667	7,825	10,492
Coronavirus Job Retention Scheme	-	97	97
Kickstart Scheme	-	5,798	5,798
Total income from donations	1,056,547	300,717	1,357,264

4. Income from charitable activities

	Restricted £	Unrestricted £	2023 Total £	2022 Total £
Consultancy income	-	360	360	1,887
Subscriptions	-	400,362	400,362	320,404
Total income from charitable activities	-	400,722	400,722	322,291

All income from charitable activities in the prior year was unrestricted.

5. Government grants

In the prior year the charity received government grant funding under the Coronavirus Job Retention Scheme and the Kickstart Scheme. In the period ending 31 March 2023 the total amount received was £Nil (2022: £5,895). There are no unfulfilled conditions or contingencies attaching to these grants.

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Notes to the financial statements

For the year ended 31 March 2023

6. Total expenditure

	Raising funds £	Charitable activities £	Support and governance costs £	2023 Total £
Staff costs (note 8)	133,460	945,493	134,411	1,213,364
Other staff costs	1,371	19,472	22,463	43,306
Workshops	-	540	6,857	7,397
Consultancy	15,400	24,621	54,781	94,802
IT and telephone costs	-	8,046	27,745	35,791
Office costs	158	5,122	4,042	9,322
Finance and governance	-	-	20,634	20,634
Amortisation	-	86,825	-	86,825
Irrecoverable VAT	-	-	11,968	11,968
Sub-total	150,389	1,090,119	282,901	1,523,409
Allocation of support and governance costs	34,297	248,604	(282,901)	-
Total expenditure	184,686	1,338,723	-	1,523,409

Total governance costs were £13,137 (2022: £13,718).

Prior period comparative

	Raising funds £	Charitable activities £	Support and governance costs £	2022 Total £
Staff costs (note 8)	102,908	693,933	106,274	903,115
Other staff costs	225	14,007	15,081	29,313
Evaluation	-	17,125	-	17,125
Workshops	-	8,318	-	8,318
Consultancy	10,700	64,690	5,350	80,740
IT and telephone costs	-	11,966	17,892	29,858
Office costs	12	1,720	2,513	4,245
Finance and governance	-	-	19,336	19,336
Amortisation	-	47,896	-	47,896
Irrecoverable VAT	-	-	13,893	13,893
Loss on disposal	-	-	7,397	7,397
Sub-total	113,845	859,655	187,736	1,161,236
Allocation of support and governance costs	21,955	165,781	(187,736)	-
Total expenditure	135,800	1,025,436	-	1,161,236

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Notes to the financial statements

For the year ended 31 March 2023

7. Net movement in funds

This is stated after charging:

	2023 £	2022 £
Trustees' remuneration	Nil	Nil
Trustees' reimbursed expenses	581	Nil
Loss on disposal of fixed assets	Nil	7,397
Amortisation	86,825	47,896
Auditors' remuneration:		
▪ Statutory audit (ex VAT)	6,500	5,400
▪ Other services (ex VAT)	Nil	7,083
	<u> </u>	<u> </u>

During the period 2 trustees were reimbursed for travel expenses, totalling £581 (2022: no trustee expenses reimbursed).

8. Staff costs and numbers

Staff costs were as follows:

	2023 £	2022 £
Salaries and wages	1,008,684	781,049
Social security costs	87,579	71,219
Pension costs	45,440	36,165
Freelancers	71,661	14,682
	<u>1,213,364</u>	<u>903,115</u>

	2023 No.	2022 No.
Number of employees earning in the range of:		
£60,000 - £70,000	1	1
£80,000 - £90,000	1	1
	<u> </u>	<u> </u>

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 £329,807 (2022: £380,797).

	2023 No.	2022 No.
Average head count	<u>32</u>	<u>26</u>

9. Taxation

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

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Notes to the financial statements

For the year ended 31 March 2023

10. Intangible fixed assets

	ChatBot app £
Cost	
At 1 April 2022	336,581
Additions in period	<u>195,649</u>
At 31 March 2023	<u>532,230</u>
Amortisation	
At 1 April 2022	47,896
Charge for the period	<u>86,825</u>
At 31 March 2023	<u>134,721</u>
Net book value	
At 31 March 2023	<u><u>397,509</u></u>
At 31 March 2022	<u><u>288,685</u></u>

Intangible fixed assets relates to the charity's ChatBot app which has now been brought into use, but continues to be developed. The app will be amortised over 4 years as each stage of development is complete.

11. Debtors

	2023 £	2022 £
Trade debtors	102,926	112,478
Prepayments	8,385	6,733
Accrued income	<u>72,037</u>	<u>-</u>
	<u><u>183,348</u></u>	<u><u>119,211</u></u>

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Notes to the financial statements

For the year ended 31 March 2023

12. Creditors: amounts due within 1 year

	2023 £	2022 £
Trade creditors	2,065	19,166
Accruals	32,251	22,228
Other taxation and social security	72,010	47,505
Deferred income (see note 13)	<u>156,442</u>	<u>138,760</u>
	<u><u>262,768</u></u>	<u><u>227,659</u></u>

13. Deferred income

	2023 £	2022 £
At 1 April 2022	138,760	118,892
Deferred during the period	156,442	138,760
Released during the period	<u>(138,760)</u>	<u>(118,892)</u>
At 31 March 2023	<u><u>156,442</u></u>	<u><u>138,760</u></u>

Deferred income relates to subscription income invoiced in advance.

14. Analysis of net assets between funds

	Restricted funds £	General funds £	Total funds £
Intangible fixed assets	-	397,509	397,509
Current assets	602,165	566,609	1,168,774
Current liabilities	<u>(10,000)</u>	<u>(252,768)</u>	<u>(262,768)</u>
Net assets at 31 March 2023	<u><u>592,165</u></u>	<u><u>711,350</u></u>	<u><u>1,303,515</u></u>

Prior year comparative

	Restricted funds £	General funds £	Total funds £
Intangible fixed assets	-	288,685	288,685
Current assets	391,914	704,848	1,096,762
Current liabilities	<u>-</u>	<u>(227,659)</u>	<u>(227,659)</u>
Net assets at 31 March 2022	<u><u>391,914</u></u>	<u><u>765,874</u></u>	<u><u>1,157,788</u></u>

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Notes to the financial statements

For the year ended 31 March 2023

15. Movements in funds

	At 1 April 2022 £	Income £	Expenditure £	Transfers between funds £	At 31 March 2023 £
Restricted funds					
Oak Foundation	273,716	457,660	(375,103)	-	356,273
Hub / Casework	97,272	146,400	(174,942)	-	68,730
ChatBot	20,926	366,686	(95,376)	(176,755)	115,481
Public Legal Education	-	55,000	(3,319)	-	51,681
Total restricted funds	391,914	1,025,746	(648,740)	(176,755)	592,165
Unrestricted funds					
Designated funds					
<i>Programme work</i>	-	215,000	(215,000)	-	-
<i>ChatBot</i>	-	-	-	397,509	397,509
Total designated funds	-	215,000	(215,000)	397,509	397,509
General funds	765,874	428,390	(659,669)	(220,754)	313,841
Total unrestricted funds	765,874	643,390	(874,669)	176,755	711,350
Total funds	1,157,788	1,669,136	(1,523,409)	-	1,303,515

Purposes of restricted funds

Oak Foundation

This is 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 and Croydon, 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.

Public Legal Education

These funds are to increase legal knowledge and legal capability and to improve the career pathway for community care law.

Access Your Right To Care

Notes to the financial statements

For the year ended 31 March 2023

15. Movements in funds (continued)

Purposes of designated funds

Programme work

Grant income which was internally designated for programme work. This has been fully expended in 2023.

ChatBot

The designated ChatBot fund represents the net book value of the intangible asset and is maintained as a distinct fund to separate it from the charity's general funds.

Transfers between funds

Transfers between funds relate to restricted capital expenditure for the ChatBot project and relocating the ChatBot intangible asset to a designated fund. The restriction on the funds has been discharged by the purchase of the asset, as the ongoing use of the asset is not restricted. This restriction has also been discharged from the internal staff time capitalised.

Prior year comparative	At 1 April 2021 £	Income £	Expenditure £	Transfers between funds £	At 31 March 2022 £
Restricted funds					
Oak Foundation	3,650	844,946	(574,880)	-	273,716
Hub / Casework	54,870	123,334	(72,842)	(8,090)	97,272
ChatBot	174,254	70,667	(69,012)	(154,983)	20,926
Public Legal Education	-	17,600	(17,600)	-	-
Total restricted funds	<u>232,774</u>	<u>1,056,547</u>	<u>(734,334)</u>	<u>(163,073)</u>	<u>391,914</u>
Unrestricted funds					
Designated funds	24,605	-	-	(24,605)	-
General funds	<u>381,984</u>	<u>623,114</u>	<u>(426,902)</u>	<u>187,678</u>	<u>765,874</u>
Total unrestricted funds	<u>406,589</u>	<u>623,114</u>	<u>(426,902)</u>	<u>163,073</u>	<u>765,874</u>
Total funds	<u><u>639,363</u></u>	<u><u>1,679,661</u></u>	<u><u>(1,161,236)</u></u>	<u><u>-</u></u>	<u><u>1,157,788</u></u>

16. Related party transactions

Rhoda Iranloye, a trustee, is also a Group Director of Regulatory for Dimensions. During the year the charity received contract income of £7,380 (2022: £nil) from Dimensions. All transactions were carried out at arms length.