

**MEETING: 20<sup>th</sup> June 2022**

**Ref: 19250**

**ASSESSMENT CATEGORY: Bridging Divides – Cornerstone Fund**

**AdviceUK**

**Adv: Sandra Jones  
Base: Tower Hamlets  
Benefit: London**

**Amount requested: £300,000.00  
{Revised request : £342,380}**

**Amount recommended: £342,500**

**The Lead Organisation**

Formed in 1979 under the name Federation of Independent Advice Centres, the organisation revised its articles and changed its name to AdviceUK in 2004 becoming the key co-ordinating body for independent advice providers in the UK with a membership of over 1,000 organisations, some 300 of which are based in Greater London. A registered charity, AdviceUK provides support to members and non-members in the areas of design and delivery of advice services, fundraising, workforce development, quality assurance and regulation, and products to support advice provision. It also seeks to influence stakeholders to create an environment that supports the provision of diverse, high quality advice services to a wide range of communities with a view to encouraging advice and support that makes a long-term difference to improving people's lives.

**The Partnership**

The partnership brought together by AdviceUK comprises eleven advice-giving organisations that serve marginalised and minority ethnic communities in London. The majority do not solely provide social welfare advice and support; all offer safe and trusted spaces in which people are supported to navigate a range of issues affecting their lives. Each organisation has participated in test-and-learn activities during the delivery stage and contributed towards the development of the Stage 2 application.

The eleven partners are: Account3; Age UK Lewisham and Southwark; Arachne Greek Cypriot Women's Group; IKWRO (Iranian and Kurdish Women's Rights); IMECE Women's Centre; Latin American House; London Chinese Community Centre; Merton Centre for Independent Living; Notre Dame Refugee Centre; Refugee Women's Association; Youth Legal; and AdviceUK, which will be leading on project management for the partnership.

**The Proposal**

Londoners in marginalised communities face multiple barriers in accessing social welfare advice to deal with the problems that they face. AdviceUK has been trialling the 'Whole Person, Whole community Approach' in Bristol and used the learning gathered there to begin developing communities of practice centred around marginalised communities in London and civil society organisations supporting them. The focus is on placing people with lived experience at the centre of the processes to re-design advice services.

Using the Whole Person, Whole Community Approach, during stage 1 of Cornerstone, AdviceUK identified that funder requirements make it more difficult for Londoners to get social welfare advice that can improve their lives. The current approach to measuring, monitoring, and evaluating social welfare advice services is limiting organisations' effectiveness. Stage 2 will therefore focus on monitoring and evaluating services. By using this approach, the collaboration will bring together Londoners from marginalised and BAME communities, advice givers, funders, and infrastructure organisations in order to ascertain what is happening currently and gain a shared view about whether current approaches to monitoring and evaluating advice services match the collective desire to improve the lives of Londoners. It will also enable key players in the system to challenge their assumptions about how performance should be measured and remove practices that get in the way of doing the right thing for those who are seeking advice. This should lead to creating new ways of supporting the advice sector and the communities they serve, making visible the value of an approach to social welfare advice that is not 'one size fits all'.

Following discussion at the assessment meeting, a revised budget has been submitted as there have been dramatic increases and forecasts for the rate of inflation and talking to partners it was felt that the impact of inflation had been underestimated. Some additional costs have also been identified through assessment.

### **Cornerstone Fund Outcomes**

This proposal meets all the long-term outcomes outlined in the Cornerstone Outcomes framework, namely, building capacity and capability; drawing on co-production; improved gathering and use of data and intelligence; enabling voice and influence and involving partners in collaborative working practices.

### **Equality Considerations**

The partners involved in the proposal support marginalised communities and are predominantly user led, with the proposal focused on involving and consulting advice service users. AdviceUK has 230 members in London, of which over 60 are focused on supporting minority ethnic communities and 30 are focused on supporting other communities of interest such as Deaf and disabled people's organisations. The aim of the proposal is to challenge systemic discrimination faced by marginalised communities.

### **Financial Information**

AdviceUK 2020/21 accounts reflect the strong financial position of the organisation which is due to its highly diversified income across twenty income streams including members, other advice agencies, grants, donors and contractual customers with the majority of income coming from unrestricted sources. The organisation has managed to remain buoyant despite the pandemic.

Year end as at	2021	2022	2023
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	3,593,588	2,681,436	2,611,356
Expenditure	(3,224,418)	(2,607,097)	(2,591,712)
Gains/(losses)	35,796	0	0
<b>Surplus/(deficit)</b>	<b>404,966</b>	<b>74,339</b>	<b>19,644</b>
<b>Reserves:</b>			
Total endowed	0	0	0
Total restricted	101,517	101,517	101,517
Total unrestricted	2,062,570	2,136,909	2,156,553
<b>Total reserves</b>	<b>2,164,087</b>	<b>2,238,426</b>	<b>2,258,070</b>
Of which: free unrestricted	1,318,631	1,392,970	1,412,614
Reserves policy target	400,000	400,000	400,000
Free reserves over/(under) target	918,631	992,970	1,012,614

## The Recommendation

AdviceUK, one of the major advice sector infrastructure organisations in the UK, has established a strong partnership of small organisations serving marginalised communities. The partnership have developed a proposal that will challenge funders around how they monitor and evaluate advice services, which will lead to systemic change that could change systems wider than just for the advice sector. A revised budget has been submitted which is realistic and is supported.

***£342,500 over three years (£106,200; £117,400; £118,900) towards a project whereby AdviceUK and 11 organisations will use a Whole Person, Whole Community approach will co-produce a challenge to funders on the way current monitoring and evaluation of advice services are limiting their effectiveness.***