

# **BEDFORD ADVICE FORUM**

Promoting and supporting the provision of advice and information services in Mid and North Bedfordshire

## **3 YEAR STRATEGY**

**2006 - 2009**

**October 2006**

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## 1. INTRODUCTION

Bedford Advice Forum was formed in 1997 to act as a forum for the advice sector in North Bedfordshire. The new Forum was created to enable agencies to discuss key issues affecting the sector such as training and funding and to enhance networking between advice agencies.

In 2001 BAF expanded its geographical boundary to include Mid Bedfordshire. This aligned BAF with new Community Legal Service Partnership that had been created for North and Mid Bedfordshire.

Although BAF has produced an annual report every year on its work, this is the first time that a document has been produced that lays out BAF's future strategy. This strategic document has been produced following detailed discussions by BAF's Steering Group and will be presented to a full BAF meeting on 31<sup>st</sup> October 2006.

## 2. AIMS OF BAF

BAF aims to:

- promote and support the provision of advice and information services in Mid and North Bedfordshire
- provide a forum for exchanging information on the provision, gaps and resource requirements of advice and information services in Mid and North Bedfordshire
- deliver, and support, training in collaboration with BAF member agencies
- seek funding for projects to develop advice services relevant to local needs

## 3. MEMBERSHIP CRITERIA

BAF members are not-for profit organisations (from the public/statutory sector or from the voluntary or not-for-profit sector) that provide advice or information on civil legal matters - either as the main function of the organisation or as an important part of its work.

BAF's constitution currently states that BAF members should provide services in Mid or North Bedfordshire.

Further details on BAF's membership criteria can be found in BAF's constitution.

A list of current BAF members can be found in **Appendix 1**.

## 4. GENERAL INFORMATION

### (a) Services provided

#### Forum meetings

BAF holds meetings for its members every 3 months. At the meetings BAF members can discuss various issues affecting the local advice and information sector. The meetings also provide members with an opportunity to publicise changes and developments in their own organisations.

Presentations are also made at Forum meetings to update members on emerging issues and projects in the advice sector.

In addition to the ordinary Forum meetings, BAF also holds an AGM once a year to review the Forum's work, to elect a Steering Group, and to ratify the Forum's accounts.

#### Training

BAF organises regular training courses for its members. Generally these courses are presented by trainers from BAF member agencies although on occasions an external trainer is brought in.

BAF's training courses are currently provided at nominal fees for its members. Non-BAF members can also attend BAF courses but are asked to pay a higher fee.

#### Bedfordshire Advice Directory

BAF produces the Bedfordshire Advice Directory which gives details of advice and information providers across the whole of the county. It also gives other useful contact details e.g. for statutory benefit agencies, MPs and local councillors.

#### Other activities

Other BAF activities have included:

- **Research into particular issues** - a recent example was a survey into debt advice amongst BAF members.
- **Input into policy discussions** - BAF was represented on the local Community Legal Services Partnership.
- **Organisation of BAF-STEP** - BAF obtained ESF funding for a training and staff development project for its members in 2003/2004

- **Funding for NVQ programmes** - BAF has funded a group of candidates on the NVQ in Advice and Guidance, NVQ in Management, and NVQ assessors' award.

## **(b) Current structure**

### **BAF members**

There are currently 54 members of BAF. A list of BAF members can be found in **Appendix 1**.

### **BAF Steering Group**

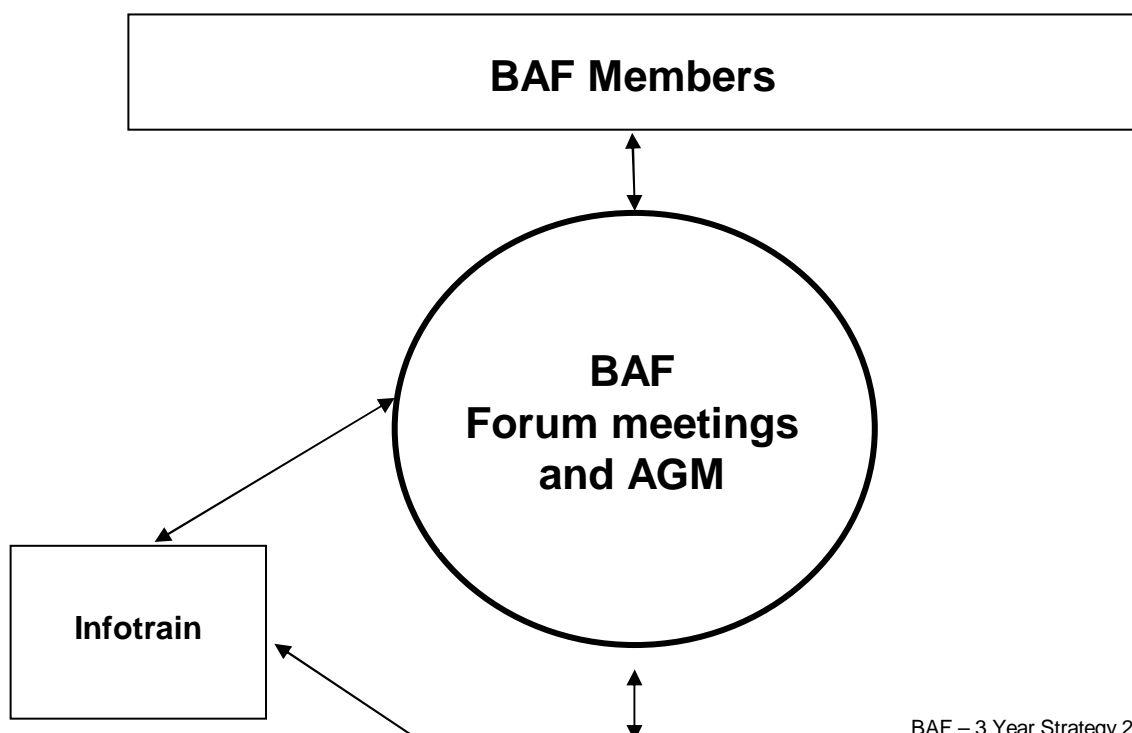
Since 2004 BAF has had a **Steering Group**, which is elected at its AGM. The Steering Group meets a few weeks before each Forum meeting to plan the meetings and to oversee BAF's services and work. The Steering Group also makes recommendations as to BAF's future work and strategy.

The members elected to the Steering Group for 2006/07 were:

David Verney (Chair)	-	Age Concern Bedfordshire
Annette Pacey (Treasurer)	-	BPHA
Len Simkins (Secretary)	-	Advice UK - Eastern Region
Tanya Richardson	-	Create / Finance ReDirect
Mark Smith	-	Mid Beds. CVS
Martin Trinder	-	North Beds. CVS
Gary Johnson	-	Welfare Rights Service (Beds. County Council)
Wendy Anderson-Welsh	-	Bedford Race Equality Council

**N.B. Mark Smith** has now left the Steering Group and **David Waggott** (Mid Beds. CAB) has joined the group

The Forum, AGM and Steering Group meetings are organised for BAF by Infotrain, a local company which specialises in support for the advice sector.



## **Main duties of BAF personnel**

### **Steering Group**

- Oversees BAF's services and work
- Plans BAF meetings
- Is responsible for BAF's finances

### **BAF Chair**

- Acts as a figurehead and spokesperson for BAF
- Chairs BAF meetings and Steering Group meetings
- Presents annual report for AGM

### **BAF Treasurer**

- Administers BAF's budget and accounts
- Prepares financial statements for BAF meetings
- Prepares and presents annual accounts for AGM

### **BAF Secretary**

- Deals with BAF correspondence
- Responsible for administering BAF meetings
- Supports Chair and Treasurer in their roles

**N.B.** A number of duties of the Secretary are currently delegated to Infotrain

### **Infotrain**

- Prepares agendas for AGM, BAF meetings and Steering Group meetings
- Takes, and distributes, minutes of AGM, BAF meetings and Steering Group meetings
- Distributes documentation to BAF members
- Maintains BAF membership database
- Administers BAF training programmes

**N.B.** Most of the above work is done by Sue Walmsley at infotrain

## **(c) Financial details**

### **Income**

At present the only income for BAF comes from fees that are charged for participants to attend BAF's training courses.

BAF does not charge a membership fee for its members although this is something that will need to be considered for the future.

At the AGM in April 2006, the accounts for 2005/06 were presented. This showed an income of **£740** for the period April 2005 - March 2006.

Obviously a key challenge for BAF over the next few years will be to generate more income.

### **Expenditure**

At the AGM BAF's expenditure for 2005/06 was listed as:

BAF training - room hire	£ 166.00
BAF training - fees to trainers (member organisations)	£ 180.00
BAF training - administrative costs	£ 465.00
BAF NVQ programme - assessments and training	£1,140.00
BAF meetings - facilitation and administrative costs	£3,700.00
BAF Directory update	£ 162.00
Insurance	£ 288.22
<b>Total expenditure</b>	<b>£6,101.22</b>

### **Profit / Loss**

In 2005/06 BAF made a loss of £5,361.22

A loss was also made in 2004/05.

These losses have only been sustainable because BAF had a surplus in its bank account as a result of the management fees it earned during a successful ESF funded project (BAF-STEP) in 2002-2004.

The balance in the account, as at the AGM in April 2006, was £6,810.76.

It is obvious therefore that, unless BAF can start to raise some income, the current level of services are only sustainable for another year or so.

## **(d) Physical resources**

BAF has no accommodation or office space and BAF has to hire rooms for its training courses and some of its meetings.

BAF meetings are generally held at BPHA, and the Steering Group meetings are held at CVS Mid and North Beds. BPHA and the CVS are both members of BAF and provide this meeting space free of charge.

Training courses are generally held at the Bunyan Meeting Free Church in Bedford, or sometimes at the CVS office in Bedford.

Much of the background support work for BAF is done in infotrain's office in Bedford.

BAF does not own any equipment or have any other physical resources. In fact the only physical item that BAF does have are some residual copies of its 2005 Bedfordshire Advice Directory.

## (e) Strengths, weaknesses, opportunities and threats

STRENGTHS	WEAKNESSES
<p><i>What is BAF good at? How can BAF begin to build on this and ensure continuous improvement?</i></p> <ul style="list-style-type: none"> <li>• BAF has a good reputation</li> <li>• BAF provides good local training</li> <li>• BAF is a central focus for the local advice sector</li> <li>• BAF keeps agencies informed of new developments in the advice sector</li> <li>• BAF Directory - well received</li> <li>• Agencies can get benefits of networking through BAF</li> </ul>	<p><i>What areas of BAF's performance and structure could be improved?</i></p> <ul style="list-style-type: none"> <li>• Relatively low attendance at BAF meetings</li> <li>• The diversity of BAF's membership makes it difficult for BAF to represent all members' interests</li> <li>• No BAF weblink / website</li> <li>• No long-term strategy</li> <li>• BAF is not a legal entity</li> </ul>
OPPORTUNITIES	THREATS
<p><i>What is happening in the wider world that will create opportunities for BAF to develop its services, improve quality and become more efficient and effective?</i></p> <ul style="list-style-type: none"> <li>• IT funding - to develop a BAF website</li> <li>• BAF could become a recognised training provider by providing more training - and charging higher fees</li> <li>• BAF could raise funds by introducing membership fees</li> <li>• BAF could become a legal entity (e.g. a Community Interest Company) - this would help with funding bids</li> <li>• The decline of the CLSP - BAF could step into this role</li> <li>• BAF could expand to cover the whole of Bedfordshire</li> </ul>	<p><i>What is happening in the wider world that may cause problems or create barriers for BAF?</i></p> <ul style="list-style-type: none"> <li>• Introducing membership fees could result in a loss of members - especially if BAF did not increase its services</li> <li>• Problems could occur because BAF is not incorporated</li> </ul>

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## 5. REVIEW OF 2005-2006

2005-06 was another successful year for BAF.

BAF produced an Annual Report in April 2006. This outlined the activities that BAF had undertaken in 2005/06.

### BAF Meetings

Last year BAF held **4 Forum meetings** for its members to discuss various issues affecting the local advice and information sector. The meetings also provided members with an opportunity to publicise changes and developments in their own organisations.

A number of useful presentations were made at the Forum meetings including:

- A positive future for BAF - discussion on BAF's aims and services
- Mental Capacity Act 2005
- Advice for Winter - covering fuel poverty, Warm Front Grants and Winter Fuel Payments
- NOS4Advice (National occupational standards for the advice sector)
- Benefits Advice in Bedfordshire - local research report
- Quality standards for the advice sector

BAF also held an **AGM** in April 2005.

**BAF's Steering Group**, which was elected at the 2005 AGM, also met 4 times during the year to plan and oversee BAF's work. The members of the Steering Group in 2005/06 were:

David Verney	-	Age Concern Bedfordshire (Chair)
Annette Pacey	-	BPHA (Treasurer)
Len Simkins	-	Advice UK - Eastern Region (Secretary)
Tanya Richardson	-	Create / Finance ReDirect
Mark Smith	-	Mid Beds. CVS
Martin Trinder	-	North Beds. CVS (from June 2005)

The Forum, AGM and Steering Group meetings were organised by Infotrain, on behalf of BAF.

## BAF Training Courses

BAF organised 3 courses in 2005/06. These were:

- Introduction to Housing Benefit
- Benefits Update
- Immigration and Benefits

Trainers for the courses were provided by BAF members: BPHA, Advice<sup>UK</sup> and Luton Law Centre. The courses were attended by 34 participants in total and were very well received.

## Bedfordshire Advice Directory

Requests for copies of the Advice Directory, which was re-published in January 2005, continued throughout the year and stocks are now almost exhausted.

A 2006 update sheet, with amendments and additions to Directory entries, was distributed in January.

There is now a call for the Directory to be available in electronic format - this will be considered by BAF's Steering Group in the future.

## Debt advice survey

Following *The Cost of Debt conference* held in Bedfordshire in 2005, BAF decided to conduct a short survey to gauge the amount of debt advice provided by BAF members.

The survey, which was conducted at the end of 2005, showed that there are very few agencies providing debt advice in North and Mid Bedfordshire (only 7 BAF organisations responded positively) and even fewer offering a service to the general public (only 2). This information was passed back to the Tackling Poverty Together Group, who organised the conference.

## 6. A 3 YEAR STRATEGY FOR BAF (2006-2009)

### (a) Background to strategy

On 11<sup>th</sup> May 2006 BAF's Steering Group held an "away day" to begin to discuss BAF's future strategy.

Various issues were discussed at the away day including:

- Review of BAF's role and structure
- Review of current BAF services
- Potential future services for BAF
- BAF strategy for the future

A SWOT analysis of BAF was also completed - see page 9 of this document.

The **key outcomes** of the discussions and the SWOT analysis were:

1. BAF's **aims** should remain the same.
2. BAF's **membership criteria** should remain the same - although with the demise of the CLSPs there is now no compelling reason why BAF should be tied to the Mid and North Beds. geographical area. Expanding to cover the whole of Bedfordshire is now more of a possibility and should be reviewed later this year.
3. BAF should endeavour to strengthen its **role** to become the recognised voice of the local advice sector in local policy discussions and meetings.
4. The **fees for BAF's training** courses are too low considering the quality of the courses. It was agreed to increase the fees and that the normal fee for a one-day course should be £40. However, a higher fee (£60) should be charged to statutory members and a lower fee (£20) should be available for small, voluntary organisations.
5. As well as increasing fees it was agreed that **publicity for BAF training courses** should be increased. In addition to publicity in being sent to BAF members, it should also be sent to: BRIEF members; CVS members; Housing Association forum members; solicitors; and agencies in Luton.
6. The **benefits of membership of BAF** should be highlighted to members. This would help strengthen member's perception of BAF. The current benefits are: Forum meetings for sharing information; training at reasonable rates; production of BAF directory. However, other services need to be provided to members to enhance the membership services. These could include: BAF website; use of BAF mail-outs for member publicity; support on quality and developmental issues for members.
7. It was agreed to **develop a BAF website**. This could provide information on BAF, its members, and its meetings. It could also provide: policy downloads; a message board for members; and updates for the BAF

- directory. In the long-run it might also be possible for BAF to sell services through the website.
8. BAF funds are decreasing and **membership fees** will need to be introduced at some point. It will be easier to do this if members recognise the benefits of BAF membership. The fee structure could be based on the structure developed for BAF training fees - with three bandings.
  9. It was important to continue to look for **funding for BAF**. It may be that it will be easier to get funding for short-term projects (e.g. development of a website) rather than any ongoing funding.
  10. BAF needs to **consider becoming a legal entity** (e.g. Community Interest Company) - this will help with funding bids, give BAF an enhanced status, and will protect individual members (and the Steering Group) if ever there were any legal action or complaints against the forum.

## **(b) Key elements of strategy**

At the next Steering Group meeting on 27<sup>th</sup> June 2006, the outcomes from the away day were discussed further and the following decisions were made:

- It was agreed that BAF should move towards a **countywide remit** by allowing advice agencies in South Bedfordshire to become members of BAF. BAF would then become Bedfordshire Advice Forum.
- **Publicity for BAF training courses** should be distributed to a wider audience. It was agreed, however, that BAF members should still have priority in booking training courses. BAF members' networks lists will be used to implement this increase in publicity.
- **Training Fee Structure** - It was agreed to introduce a 'banding' system for BAF member training fees:
  - **Standard Rate** - for organisations with 1-100 employees. This will apply to the majority of BAF members
  - **Higher Rate** - for Councils, Housing Associations, Police, Colleges etc. i.e. those organisations with over 100 employees.

Organisations that are run completely with volunteers can request to pay at a discretionary lower rate. Non BAF members will continue to be charged at a rate above the high rate for members.

- BAF should consider becoming a **Community Interest Company** i.e. a Limited Company which is run for the benefit of the community with no shareholders. It would give BAF the enhanced status of a legal entity which would strengthen BAF's funding bids and protect individual members if ever there were legal action or complaints against the Forum.
- **BAF Website** - in order to achieve most of the aims discussed at the strategy meeting, BAF needs to set-up a website.

- A **funding application** should be made to The Bedford Charity under its grants programme for voluntary sector infrastructure support – and to other funding streams if appropriate.

## (c) Cost implications

The cost implications of the above strategic decisions are:

- **Countywide remit** – The increased membership will result in minor increases in costs for BAF in terms of extra stationery and postage for communications. However, these extra costs should be more than offset by extra training fees received from South Bedfordshire members.
- **Increased publicity for BAF training courses** – There will be some extra costs in terms of staff time, stationery and postage in extending publicity for courses. However, as much publicity as possible will be distributed via email at no extra cost, and any extra costs incurred should be more than offset by extra training fees from non BAF members.
- **Training fees** - It is proposed that the standard rate for courses will be £40, with the higher rate (for large organisations) set at £60. This will mean that BAF courses are still very good value (compared to similar courses, mainly in London, which often cost about £100) and therefore demand should not decrease. However, there will be substantial extra income for BAF from the increased fees. At the moment the fees are £20, therefore the increase in fees should more than double the training income for BAF.
- **Community Interest Company** – The cost of setting up a CIC is only about £200. However, there are annual costs to be paid to cover the Company Secretary work, Companies House fees, and accountancy fees. In total this could amount to about £900 a year. It is therefore a risk for BAF to set up a CIC but it is hoped that the extra status that BAF will have as a CIC will help it to attract funding more easily. It will also be important to make sure that any funding applications cover the costs of running the company.
- **BAF Website** – There are obvious costs in developing a website. The costs of setting up a BAF website could range from £500 - £5,000 depending on the complexity of the site. There will also be annual costs in maintaining the site which could be £500- £2,000. Although BAF should definitely set up a basic website, the development of a more complex site will depend on whether external funding is available. However, in the long-run it is hoped that a website could start to generate some income through the sale of various services) that could help offset the maintenance costs.
- **Funding applications** – There are some costs involved in applying for funds mainly through the time involved in developing the bid. Wherever possible BAF will try to pay for this work on a “no win, no fee” basis where payment of a fee (or allocation of later work) is only made if the funding is successful. Therefore there are no direct cost implications in BAF applying for funds.

It is clear that the only elements of BAF's strategy that could have negative cost implications are: becoming a Community Interest Company; and developing a BAF website. BAF's view is that forming a CIC is a calculated risk – but because BAF will benefit in the long-term, the change should be implemented. Developing a website is also important but, because of the costs involved, only a basic website

can be developed at the moment – unless funding becomes available to develop a more complex website.

## **(d) Action plan for 2006-2007**

### **September 2006**

- Submit initial **funding application to The Bedford Charity** under its grants programme for voluntary sector infrastructure support.
- Attend meeting with local advice groups to discuss possibility of applying for **partnership funding from Advice Plus** – BAF's interest will be to provide infrastructure support services to the partnership.

### **October 2006**

- Submit full **funding application to The Bedford Charity**, if the initial proposal is accepted.
- Submit an **application to Advice Plus**, if there is agreement for a partnership bid.
- Submit **BAF's draft strategy** to the BAF meeting on 31<sup>st</sup> October for approval. Key issues to be approved are:
  - BAF to become a Community Interest Company
  - BAF to extend membership to South Bedfordshire – and become Bedfordshire Advice Forum
  - BAF to introduce higher, banded training fees and extend its publicity for training courses
  - BAF to develop a website

### **November 2006**

- Start background preparations for BAF to become a **Community Interest Company**
- Commission a website designer to develop a **BAF website**. (The complexity of the site will depend on whether the funding application to the Bedford Charity is successful and whether other funds may be available)

### **December 2006**

- Make application for BAF to become a **Community Interest Company**
- Develop **BAF website**
- Plan BAF **2007 training programme** and design new publicity system

- **Send invitations to relevant agencies in South Bedfordshire** to become members of BAF

## January / February 2007

- Launch of new Bedfordshire Advice Forum – as a **Community Interest Company**. (N.B. This change will require agreement at a special BAF meeting or an AGM)
- Launch of publicity for **BAF 2007 training programme** - using new publicity system and new fee structure
- Launch of **BAF website**

## March / April 2007

- Review BAF strategy for 2006-2009 and set new strategy for 2007-2010
- Review BAF action plan for 2006-2007 and set action plan for 2007-2008

## (e) Future considerations

When developing its future strategy, BAF needs to consider various other opportunities for developing its work. These could include:

- BAF becoming the key training provider for the local advice sector. BAF could consider organising regular, comprehensive training programmes for the advice sector – rather than the occasional, small scale programmes that are currently organised
- Registering with the Law Society so that BAF training courses could have CPD (Continuous Professional Development) status. This would make the courses more attractive to BAF members with LSC contracts and to solicitors
- BAF taking on part of the role of the now defunct Legal Services Partnership by becoming the body that monitors the advice needs, and advice supply, in the not-for-profit advice sector in Bedfordshire
- BAF becoming the focal point for the development of a Community Legal Advice Network (CLAN) in Bedfordshire, in line with proposals for CLANs and CLACs in the recently published Community Legal Service strategy
- BAF becoming the recognised voice of the not-for-profit advice sector in Bedfordshire and representing the sector in local and regional policy discussions
- BAF taking on a quality support role by helping smaller advice agencies develop their services to a recognised quality standard
- BAF developing a website that not only assists its members but also acts as a means of selling services to non-BAF members



# APPENDIX 1

## BAF - Current Members

There are 54 members of BAF (as in June 2006).

- Advice UK (Eastern Region)
- Advocacy Alliance
- Age Concern Bedfordshire
- Anchor 'Staying-Put' Bedford
- Aragon Housing Association
- Bedford & District CAB
- Bedford African Caribbean Forum
- Bedford Borough Council – Community Welfare
- Bedford Borough Council – Housing Advice Service
- Bedford College
- Bedford Community Rights Centre
- Bedford Credit Union Ltd
- Bedford Foyer (BPHA)
- Bedford Housing Link
- Bedford Race Equality Council
- Bedford Samaritans
- Bedford Volunteer Bureau
- Bedford YMCA
- Bedfordshire Child Poverty Action Group
- Bedfordshire County Council – Action Point
- Bedfordshire County Council – Children's Information Service
- Bedfordshire County Council – Trading Standards
- Bedfordshire County Council – Welfare Rights Service
- Bedfordshire Housing Aid Centre
- Bedfordshire Police - Welfare Department
- Bedfordshire Refugee & Asylum Seeker Support
- Bedfordshire Rural Communities Charity - Carers Short Breaks
- Bedfordshire Rural Communities Charity - ILM Programme
- Bedfordshire Rural Communities Charity - Village Care Schemes
- Beds. & Herts. Energy Efficiency Advice Centre
- BPHA

- Christian Family Care
- Community and Voluntary Services (Mid and North Beds.)
- Create / Finance ReDirect Ltd
- Family Groups (Bedford)
- Home-Start Bedford
- Hope Debt Advice Centre
- King's Arms Project
- Langley House Trust
- Lansdowne Surgery Patient Support Service
- Luton Law Centre
- Mayday Trust
- Mid Bedfordshire Citizens Advice Bureau
- National Childminding Association
- North British Housing Association
- Peterhouse Project
- Relate
- Rutland Road Church
- Sight Concern Bedfordshire
- Spurgeon's Child Care
- Soldiers, Sailors, Airmen and Families Association
- Sure Start Cauldwell
- The Bedford Charity
- Victim Support Bedfordshire