

The background of the cover is a photograph of a busy, brightly lit hallway. People are seen walking in various directions, some in the foreground and others further down the corridor. The lighting is warm, with yellow and orange tones. The overall scene suggests a professional or public environment.

# advice<sup>ni</sup>

*the independent  
advice network*

ANNUAL REPORT 2004



photo: john baucher

advice<sup>ni</sup>  
the independent  
advice network

Director

## Director's Report

The advice sector has been through a fairly difficult year both in terms of funding and in coping with the raft of government policy and operational changes. In relation to funding it has proved virtually impossible for members to be able to access Peace 2 funding and some members unfortunately have ceased their advice service operations while others have been only able to offer reduced services to their users. This is despite a steady increase in demand for services resulting largely from the introduction of initiatives such as Tax Credits and the wider Welfare Reform and Modernisation Programme. And while a number of advice<sup>ni</sup> members did receive some additional funding through the Social Security Agency, these and other initiatives will continue to present major challenges for the sector over the coming year.

The recently published Taskforce Report 'Investing Together' will also have major implications for the sector as a whole, particularly around issues of accountability, quality assurance and governance. How we deliver our services and measure our work will present particular challenges. We will need to become much more outcome focused - we need to think how we can best meet the needs of those who we work with and we must increasingly explore and develop opportunities for delivery mechanisms which empower, develop capacity and focus more clearly on promoting social inclusion. To be truly effective in meeting the needs of our service users we will need to extend and engage in new partnerships across the range of public, private and voluntary sectors. Developing outcome focused plans and targets will be a key focus for the year ahead. We have started to develop with our membership, quality assurance processes and will be publishing a number of best practice guides in the coming year.

Finally I want to thank the management committee of advice<sup>ni</sup> for their support to me during the year and also to the staff who do such a marvellous job on your behalf. Can I also thank all our members, subscribers, funders and supporters for your help and guidance during the past year. Please enjoy the rest of this report.

Bob Stronge  
Director



photo: john baucher



# ChairChair

## Chair's Report

Welcome to this year's Annual Report. The past year has been extremely busy time for advice<sup>ni</sup> with a number of major new initiatives underway which you will read about in more detail in the rest of this Annual Report.

It is very gratifying to me personally to report that the organisations performance against the targets set out in the strategic plan have all been progressed. The re-branding to advice<sup>ni</sup> has proved to be a very positive development, as has our decision to seek Investors in People standard, which has meant that many new organisational policies and procedures have been put into place. These have improved planning processes, created better organisational governance and improved staff development opportunities. The move to new premises has also been a very positive development for staff.

advice<sup>ni</sup> has continued to build strong relationships/partnerships with a range of organisations and it continues to strive to create opportunities for members to become actively involved in its activities. The world of advice and information services is changing fast. There are many new developments in the pipeline including the Taskforce on Resourcing the Voluntary Sector and the DSD's new Advice and Information Strategy and it is essential that we keep our membership fully informed and engaged in these processes.

As this is my third and last year as chair of advice<sup>ni</sup> I would like to say how much I have enjoyed the varied work that has been involved and would like to thank all the staff and Management Committee members for their support and help over this time.

Mathilda Taulbutt  
Chair

'advice<sup>ni</sup> will play a proactive role in providing leadership to the independent advice sector'

## Quality Assurance and Membership Criteria

In the past twelve months there have been significant quality assurance developments in advice<sup>ni</sup> both in terms of our own organisation and member participation in developing a quality assurance framework for the sector.

"...good growth and development of organisation with training and other online services. Good initiatives are already in place and are working well to support the membership"

*Anne Donnelly, National Union of Students /the Union of Students in Ireland*

Our quality assurance work has been guided by the extensive research we conducted into existing quality assurance models including the Community Legal Service Quality Mark in GB, advice<sup>uk</sup>'s Achieving Excellence model, the NVQ in Advice and Guidance and the Investors in People standard. At the conclusion of the research the Investors in People Standard was selected as the basis for taking forward the quality assurance work. advice<sup>ni</sup> is seeking accreditation to the liP standard and an liP Group Contracting scheme has commenced, which will see ten member organisations work towards achieving the Investors in People standard.

"...keeps us informed of developments in the advice sector"

*Patricia Murray, Employers for Childcare*

Member involvement has been maximised via a Quality Assurance Working Group (QAWG) in which over one third of the membership participated. The QAWG met twice in the past year and also sent a delegation to London to meet with representatives of advice<sup>uk</sup>'s quality assurance team and visit a Quality Mark accredited advice agency.

To ensure that quality assurance benefits the entire membership, proposals for reviewing the advice<sup>ni</sup> membership criteria have been discussed in detail. A set of draft revised criteria has been piloted among the QAWG and a full consultation with the entire membership will be conducted before the implementation of any new criteria.

The guiding principle of all our work in this area has been to ensure that it is inclusive and that learning is cascaded to assist all members to develop quality systems appropriate to their needs.

Leadership





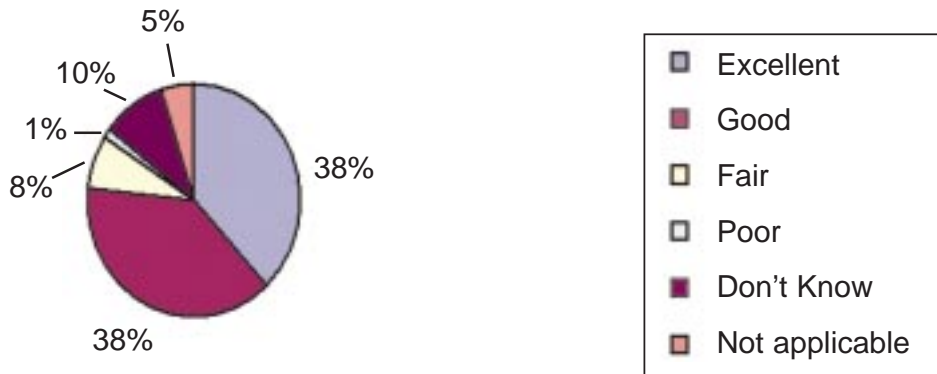
advice<sup>ni</sup> has continued to highlight the work of the membership and the experiences of their clients with key stakeholders:

- ▶ We played an active role in the Advice Services Alliance / Social Security Consultative and Operational Forum.
- ▶ advice<sup>ni</sup> representatives met with the Social Security Advisory Committee, using this meeting to raise issues in relation to Pension Credit, Disability Living Allowance, Tax Credits and poverty in Northern Ireland.
- ▶ We highlighted the role of the independent advice sector at meetings with the Northern Ireland Legal Services Commission, the Department for Social Development and local Councils.
- ▶ We took the lead in facilitating Partnerships for Pensioners, a group made up of members of the Advice Services Alliance and the Pension Service. Initially this group monitored the ongoing problems with Pension Credit, but latterly discussions have broadened to include issues such as take-up and the role of Pension Advisers.

“We greatly value the partnership with advice<sup>ni</sup> and other voluntary organisations, in considering the needs of older people”  
*Brian Doherty, SSA Pension Service*

## Overall satisfaction with leadership in the following service areas

(Welfare Reform, Money Advice, Funding, NVQ, Social Policy, Insurance, Newsheet, Email List, Online Forum, Development Planning, Website, AIMs, Quality Assurance).



source: advice<sup>ni</sup> membership evaluation 2004

# Leadership

## Welfare Reform and Modernisation Project

This year saw the design and implementation of a major new project on Welfare Reform and Modernisation (WRM). This project which is funded by the Social Security Agency is designed to assist ASA members and the public in understanding and taking advantage of the changes to the welfare system being introduced as part of the Welfare Reform and Modernisation Programme.

"The funding of a post under the Welfare Reform & Modernisation Project has given Age Concern Northern Ireland an exciting opportunity to promote the uptake of benefits with older people through a programme of benefits talks and outreach sessions. We want to thank advice<sup>ni</sup> for helping us through the development of this valuable initiative and for the practical support in installing and adapting AIMS."

*Caryl Williamson - Age Concern*

Throughout the year WRM funded advisers have offered independent and confidential advice and information to their clients. Their assistance has helped many clients deal with often confusing WRM issues.

During the year advice<sup>ni</sup> has assisted in the delivery of this project by: -

- ▶ Managing the financial and budgetary aspects of the project
- ▶ Helping to facilitate the resolution of operational problems experienced by project members
- ▶ Assisted in helping to provide support and networking opportunities for groups by liaising closely with public sector partners
- ▶ Helping raise awareness of policy issues arising from the WRM project
- ▶ Contributing articles to *adviceMatters* on WRM issues
- ▶ Facilitating and supporting WRM Steering Group
- ▶ Developing and moderating a WRM e-Group
- ▶ Co-ordinating progress and evaluation reports
- ▶ Collating statistics to help provide a co-ordinated analysis of the impact of WRM
- ▶ Consulting with project partners in relation to the effective Monitoring and Evaluation of the Project
- ▶ Delivering free training on the Advice and Information Management System (AIMS) to our members

"A client of mine was getting Pension Credit of £2.50 per week and paying Housing Benefit of £55.00 per week. He now receives a Pension Credit of £60 per week and pays no Housing Benefit. Backdated money is over £6,000. Without the WRM programme this would not have happened.

*James Dunlop - Help the Aged*

Leadership



photo: john baucher

## New Developments

### Money Advice Services

With the huge increase in personal debt the need for a clear, sustainable money advice strategy is increasingly apparent and advice<sup>ni</sup> along with our colleagues in the ASA have been lobbying the Department for Enterprise Trade and Investment for funding to establish a dedicated money advice service for Northern Ireland. Key to this service will be the consolidation and expansion of existing frontline advice services and an effective support infrastructure for money advisers. This should include co-ordinated training, an advisers forum and specialist consultancy and referral mechanisms. advice<sup>ni</sup> are committed to working towards the establishment of a Northern Ireland wide money advice service by March 2005.

### DSD Advice and Information Strategy

Considerable work has been devoted to working in partnership with other ASA members and the DSD to develop a new ten year strategy for advice services in Northern Ireland. advice<sup>ni</sup>'s Director was a member of the strategy working group. The DSD plans to consult on the strategy in the New Year and we will undertake an in-depth consultation with members on this issue at that time.

"advice<sup>ni</sup> has provided excellent support and guidance to our project. Membership gives our project a means of consultation and have an overall say regionally in issues involving advice and information"

*Eugene Bradley, Neighbourhood Assist*

Leadership

# 'advice<sup>ni</sup> will provide services and support to its membership'

advice<sup>ni</sup> provides a range of services to its members which currently numbers 81. Services include professional indemnity insurance; 75% of our members avail of this and a number also avail of other insurance packages at competitive rates through our broker, Kyle Insurance plc. We provide guidance and support on organisational issues including draft policies on Equal Opportunities, Complaints and Confidentiality Policies as well as a range of support services on personnel matters. The number of Subscribers which stands at 57 also continues to grow. advice<sup>ni</sup> continues to refer requests for advice from the public to appropriate advice providers.

Totals Calls logged	4,920
Calls from advice <sup>ni</sup> members	1,022
Calls from members of the public seeking information or advice	1,000

## ICT

advice<sup>ni</sup> continues to provide appropriate support both internally and to its members encouraging advice workers to use ICT as a tool to support their work:

- ▶ There are currently 91 advice workers across Northern Ireland subscribed to the advice<sup>ni</sup> e-mail list which is used to promote events, raise issues of concern and share information.
- ▶ The advice<sup>ni</sup> website is regularly updated with information and news relevant to the advice sector and those seeking advice - [www.adviceni.net](http://www.adviceni.net) The most visited pages after the home page are Contact Us, Where to Find Advice, and Find Your Local Advice Centre. The site attracts an average of 567 hits per day.
- ▶ ICT support was provided to members in the form of helping to source new systems, writing ICT strategies, costing Internet usage and installing and configuring AIMS.

## AIMS

advice<sup>ni</sup> continued to support its members in the use of AIMS (Advice & Information Management System) through training and technical support. We commissioned the London Advice Services Alliance (LASA) to create a report specifically for use by our members. The advice<sup>ni</sup> Workload Report gives an analysis of:

- ▶ new and existing clients who have started enquiries in the period
- ▶ clients by postcode
- ▶ all client contacts in the period
- ▶ all work done in the period
- ▶ referral and special cases in the period

Under the Welfare Reform Project advice<sup>ni</sup> successfully secured funding to enable 30 members to begin using AIMS as a standardised case recording system. In the year covering this report, 38 advisors undertook AIMS training at introductory level and a further 8 at

"Lasa's work with advice<sup>ni</sup> over the last year has proven to be a very successful collaboration, both in the implementation of the joint AIMS IT software project, and in particular the development of a specific Northern Ireland report for use by membership agencies. We hope that the Northern Ireland advice & information sector continue to benefit from the work of advice<sup>ni</sup> and LASA looks forward to further developing our partnership work on the AIMS software".  
*Phil Woodall, Project Manager, LASA Aims Team*

Support



# Training



## Money Advice Training and Development

advice<sup>ni</sup> continue to work closely with the Money Advice Trust (MAT) and the Wiseradviser Operational Team in order to ensure accessible high quality relevant and co-ordinated money advice training in Northern Ireland. We have taken the lead in the roll-out of MAT approved Wiseradviser face-to-face courses. In doing so we have recognised and maximised the expertise within the advice<sup>ni</sup> membership. A tutor group has been established to focus on development and implementation and to support the cascading of learning and sharing of information. Experts within the field of money advice have assisted with mapping courses across the UK and identifying relevant courses for Northern Ireland. advice<sup>ni</sup> has developed draft standards (to be approved by MAT) that will lay out the skills, experience and knowledge required for an adviser to be working to generalist, skilled and specialist levels in money advice. Our aim is to develop an agreed learning map for Northern Ireland that will guide all practitioners on a progression route that best suits their needs.

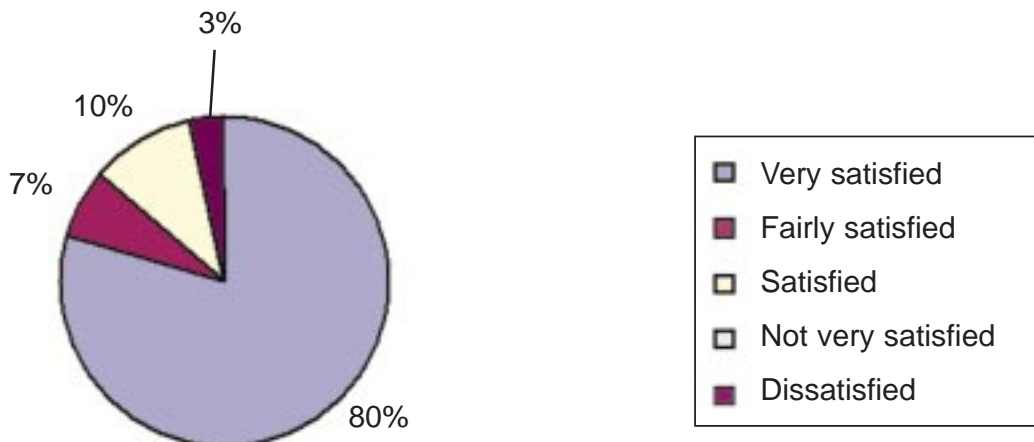
“The Money Advice Trust has enjoyed a further years work with advice<sup>ni</sup>. Their delivery of wiseradviser training services underpin quality money advice and we look forward to continuing this excellent partnership”  
*Rachel Fry, Money Advice Trust*

Over 45 individuals, from within advice<sup>ni</sup> membership, Citizens Advice Bureau, Trading Standards Service, General Consumer Council, Sx3, and the Consumer Advice Centre, have successfully completed one of the 4 Generalist Level Dealing with Debt courses delivered by advice<sup>ni</sup>. This training has equipped them with the skills and knowledge to deliver holistic money advice at the basic level. advice<sup>ni</sup> is engaged in a sector wide approach to unit and individual accreditation for money advisers and has submitted a proposal submission to Northern Ireland Open College Network for accreditation of the generalist level course.

'I found the maximising income and minimising debt section and the group work to be most useful as I was able to discuss items with other workers.'

'I felt the level of knowledge was very relevant and I felt that I was able to follow the notes all through the day - very informative, clear and precise training.'  
*Evaluation quotes from course participants*

### Members overall satisfaction with services



source: advice<sup>ni</sup> membership evaluation 2004

Support



“The main change I have found from undertaking the NVQ is the increased confidence I have in my own ability to deal with clients”  
*Evaluation quote from NVQ course participant*

**National Vocational Qualifications ( NVQ's)**

advice<sup>ni</sup> continue to operate as an approved Open University Assessment Centre for the delivery of the NVQ in Advice and Guidance Level 2-4 and the Assessor and Verifier awards. We have improved accessibility to the qualifications by running parallel candidate workshops in Belfast and Derry and have developed a blended approach to supporting assessors in undertaking assessment activity by producing an assessor pack and CDrom. Regular assessor, standardisation and internal verification meetings have been held to ensure high standards and we have successfully undergone 3 external verification visits demonstrating advice<sup>ni</sup> commitment to quality assurance.

Interest in the vocational qualifications continues to grow and developments have been supported through the ASK project (Advice Skills and Knowledge) - a partnership project with Law Centre (NI), which is now in it's second year. Members are seeing the benefits of the project to their organisation, staff and volunteers. In the first year 52 candidates started the project; 42 achieved a NIOCN Welfare Rights Adviser Programme certificate; 1 candidate also completed an NVQ Level 3, a further 10 are presently undertaking an NVQ. advice<sup>ni</sup> and Law Centre (NI) have designed workbooks that link the evidence requirements for the Welfare Rights Adviser Programme and NVQ awards thus providing candidates with an opportunity for dual accreditation.

This year saw the retirement of Roger Crowther, our External Verifier since 1998. Roger provided much support and encouragement to advice<sup>ni</sup>. We thank him for his commitment and wish him well.

advice<sup>ni</sup> work to develop and strengthen existing provision in the area of Advice & Guidance, utilising in an innovative and creative way, OU qualifications. The centre team demonstrate excellent sector and local knowledge, commitment to quality outcomes and to improving networking and collaboration between advice<sup>ni</sup> members.

*Caroline Morris, External Verifier*

Year Ending March 2004	
Total no. of candidates registered:	69
Total no. of completers	40
Total no. in progress	18
Total no. de-registered	11
No. of active assessors	8
No of active internal verifiers	4
No. of Workshops/ Assessors meetings	17

ask  
 Support  
 710ddns

## 'advice<sup>ni</sup> will represent the interests of its members in all its activities'

Facilitating social policy debate within the membership and presenting social policy issues to statutory agencies has become an increasingly prominent area of work within advice<sup>ni</sup>.

In the last twelve months, quarterly Social Policy Briefing Papers have been published on the Reform of Water and Sewerage Services in Northern Ireland; Targeting Grant Aid for Private Sector Housing; the Social Security Agency's Benefit Take-up Strategy; Pension Credit - The First 60 Days and Tax Credits - Looking Back, Moving Forward.

In addition, our quarterly newsheet, *adviceMatters*, continues to have a dedicated Social Policy section which contained 14 social policy issues in the past year. These issues were highlighted by a total of 35 advisers from centres across Northern Ireland and related to a variety of subject areas including Pension Credit, Disability Living Allowance, Income Support, Direct Payment, Incapacity Benefit and Tax Credits.

advice<sup>ni</sup> has also endeavoured to represent the views of members by responding directly and/or indirectly to the following consultations;

- ▶ NICVA policy manifesto
- ▶ Rates Reform
- ▶ Disability and Carers Customer Charter
- ▶ Pension Service Customer Charter
- ▶ Jobs & Benefits Customer Charter
- ▶ Child Poverty consultation
- ▶ Neighbourhood Renewal consultation
- ▶ A shared Future - Improving Relations in Northern Ireland
- ▶ Wiseradviser Strategic Plan
- ▶ Belfast City Council Advice Services Review
- ▶ New TSN - The Way Forward
- ▶ TRIAX Health Renewal Sub-group - Debt and Ill Health
- ▶ DETINI Report on the Provision of Money Advice in Northern Ireland
- ▶ Financial Services and Markets Act: two year review: Changes to Secondary Legislation
- ▶ DSD Equality Impact Assessment for Community Support Programme
- ▶ Credit Unions and Industrial and Provident Societies Review: Initial Consultation on Proposals for Modernisation of Northern Ireland Policy on Credit Unions and Industrial Provident Societies
- ▶ Belfast City Council Draft Community Support Plan 2004-2007
- ▶ People and Places Neighbourhood Renewal in Belfast Draft Implementation Plan
- ▶ Better Communication: a study looking at developing better communication between the ASA and the Advice Sector

'advice<sup>ni</sup> is in the privileged position to be the only advice sector umbrella body in Northern Ireland whose membership and thereby whose policy comment, can authoritatively reflect the 9 dimensions of equality under Section 75 of the Northern Ireland Act 1998. As such, considerable potential exists to lead the social policy debate from an equality perspective, informed and evidenced by the direct frontline casework experiences of members.'

*An External Review of the Social Policy Online Project*  
*Jan Wright, Associate Consultant, CENI*

# Representation

# Representation

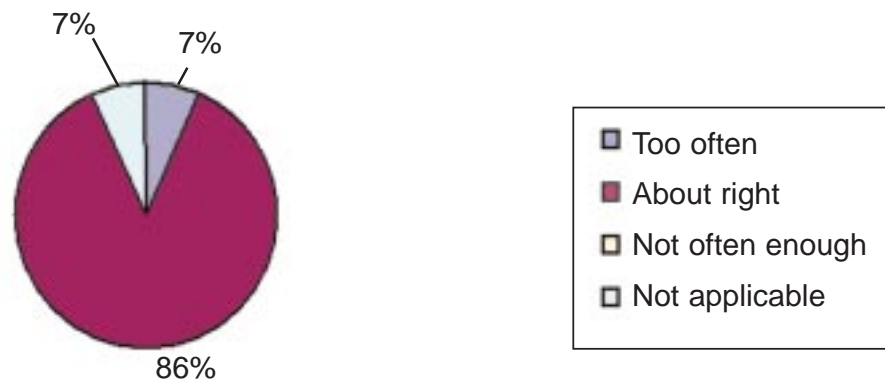
In addition, advice<sup>ni</sup> is represented on the following committees: the NICVA executive committee, the General Consumer Council (NI) Consumer Skills for all Project, the Advisory Council for Infrastructure Investment, the Organisation of the Unemployed NI, the Northern Ireland Anti-Poverty Network, the Women's Resource & Development Agency, QUB e-Consultation Study Group and the ICT Steering Group, Wiseradviser Operational Team.

## Belfast City Council

advice<sup>ni</sup> has been actively involved in negotiating the future development of advice services in the Greater Belfast area. We have liaised closely with Council on the Review of Advice Services and have held meetings with members enabling them to directly inform the strategic direction of advice services. This year saw Council move closer to the principle of equitable distribution of funding as the independent advice sector received 43% of the core funding available to the advice sector. advice<sup>ni</sup> are committed to working in partnership with the Council, DSD, our members and other stakeholders to get the best possible solution to address the advice, information and advocacy needs of the people of Belfast.

Our organisation values our partnership working with advice<sup>ni</sup>. We sit on the management committee and feel involvement is excellent"  
*Pat Austin, Help the Aged*

## How members rated communication between advice<sup>ni</sup> and themselves



source: advice<sup>ni</sup> membership evaluation 2004

## e-Consultation

advicenet, an online forum for advice workers to discuss policy issues, funded by the Community Foundation for Northern Ireland, was officially launched at Parliament Buildings in Stormont by Bill McCluggage, Director of eGovernment NI. The event was sponsored by MLA's Fred Cobain, Ulster Unionist Party and Mary Nelis, Sinn Fein.

"Finally I would like to say 'thanks' for hosting a very informative and enjoyable workshop last week. The event has even got me (a non internet person) on the Big Web"  
*e-consultation workshop participant*

Prior to the launch of advicenet, advice<sup>ni</sup> held two focus groups to find out how advisers wanted use an online forum. There were two clear requests; that the forum should be well moderated and that it should be private to advice workers. Based on these findings advice<sup>ni</sup> accessed 7 people from within the sector to the Hansard Society accredited e-moderator training and plugged an online forum into the existing website for use by members.

Advice workers from independent advice centres across Northern Ireland have since accessed the forum from their desktops to participate in an e-consultation on Pension Credits (Dec 2003) and one on Tax Credits (Mar 2004). advice<sup>ni</sup> gathered the views, experiences and recommendations made by the advice workers and presented a report to the Pension Service and to the Inland Revenue. Both reports were well received.

advice<sup>ni</sup> recognises that advicenet captures the views and comments of those within the membership who have the skills and technology to participate but realise that some of our members have been unable to get involved. In an effort to begin to address this advice<sup>ni</sup> ran parallel workshops to enable those without Internet access to participate.

The issue of the 'digital divide' and differential access to the web in relation to geographical location; resources and skills are issues which limit the potential of the e-consultation process and which we will be seeking to raise and address in the context of our future e-consultation activities.



Representation

'advice<sup>ni</sup> will ensure that it has the necessary skills, resources and organisational capacity to enable it to meet the requirements of this strategic plan'

advice<sup>ni</sup> has adapted internal management systems in line with the requirements of Investors in People; developed individual staff development plans in line with organisational aims and objectives; reviewed the staff appraisal system and developed improved methods of internal communication through developing an online diary and better file sharing .

We have researched an appropriate method for maintaining an effective, accountable, financial, auditing and monitoring system and took the decision to move to a cost based account process from April 2004 using Sage Accounts. We have undertaken training on how to use this system. We have reviewed organisational budgets regularly as well as policies in line with funding requirements. We have also put a purchasing strategy and equipment inventory in place.

### Staff Development

Internal systems are in place in line with requirements of forthcoming Investors in People. We continue to update selection and recruitment procedures and staff terms and conditions within the organisation. We have developed a database to record and cost training for the organisation and general templates for use by staff to improve internal communication methods.

Staff have undertaken development in the following:

- ▶ Accredited Management Training
- ▶ Strategic Planning
- ▶ Leading Change course
- ▶ Training for Trainers
- ▶ Communication Skills
- ▶ Quark training
- ▶ Photoshop training
- ▶ External Moderation training
- ▶ Responding to Consultation training
- ▶ Quality Money Advice
- ▶ Media training
- ▶ Sage Software training
- ▶ Web planning
- ▶ eModerators course
- ▶ Macromedia Dreamweaver training
- ▶ NICVA First Line Management



# Organisation

"I have found the service a valuable support in both present and previous employment. The staff are all helpful, professional and always willing to help with any query"

*Mary Breen, Fermanagh Rural Community Initiative*



*advice<sup>ni</sup> staff left to right*

photo: john baucher

Kathleen Mulligan, Finance Administrator; Fiona Magee, Greater Belfast Membership Support; Patricia Donald, ICT Co-ordinator; Bob Stronge, Director; Kevin Higgins, Regional Membership Support; Arfawn Yassin, Welfare Reform Project Co-ordinator



Dominic Sharvin  
NVQ Dev. Worker



Elkie Ritchie  
Receptionist

advice<sup>ni</sup> would like to thank Brenda McTaggart from the Inland Revenue who ended her secondment with advice<sup>ni</sup> in March 2004 and also the other staff who moved on during the year: Neil Paterson and Kate Kiddle.

## **advice<sup>ni</sup> Management Committee**

Mathilda Taulbutt, Chair, Limavady Community Development Initiative

John Fairfield, Ballynafeigh Community Development Association

Conor McGale, Omagh Independent Advice Services

Harry Smith, Lower North Belfast Community Council

Sharon Dillon, Northern Ireland Council for Ethnic Minorities

Kevin Oakes, Belfast Unemployed Resource Centre

Jim O'Callaghan, Housing Rights Service

Barry McMullan, NIACRO/Prisonlink

Jim Doran, LIAISE

Mary McManus, East Belfast Independent Advice Centre

Liz Toman, Craigavon Independent Advice Centre

Pat Austin, Help the Aged

Eilish Kilgallon, Royal National Institute for the Blind

**Staff & Management**

# Subscribers

Advice Services Alliance UK  
 Armagh & Dungannon HSS Trust  
 Armagh Unemployed Group  
 Belfast Central Mission  
 Belfast Women's Aid  
 CAJ  
 Child Care NI  
 Children's Law Centre  
 Coalition on Sexual Orientation  
 Community Development & Health Network  
 Cookstown & Dungannon Women's Aid  
 Coolock Community Law Centre  
 Council for the Homeless  
 Craigavon & Banbridge Community HSS Trust  
 Craigavon Borough Council  
 EGSA  
 Equality Commission for NI  
 Foyle Friend  
 General Consumer Council  
 Greater West Belfast Community Association  
 Rosaleen Moore  
 Joe Blake  
 Sean O' Farrell  
 James Masson  
 Inland Revenue  
 Law Centre NI  
 Multi-Cultural Resource Centre  
 NEA NI  
 Network Personnel Ltd.  
 Newry & Mourne District Council  
 Newtownabbey Borough Council  
 NI Anti Poverty Network  
 NI Human Rights Commission  
 NI Ombudsman's Office  
 NI Women's Aid Federation  
 NIPSA  
 North & West Belfast HSS Trust  
 Office of the Social Fund Commissioner  
 Organisation of the Unemployed NI  
 Pension Service  
 Postwatch NI  
 Probation Board for Northern Ireland  
 Rasharkin Women's Group  
 Sarah Timmins  
 Shelter NI  
 Social Security Agency  
 Sperrin Lakeland Senior Citizens Consortium  
 Suffolk & Andersonstown CAB  
 The Green Party

Triangle Housing Association  
 TV Licensing  
 U.S.E.L.  
 Ulster Supported Employment Ltd  
 UNISON  
 Women's Support Network  
 Workers Educational Association

# Funders







Age Concern Castleberg  
Age Concern Coleraine  
Age Concern NI  
Ardoyne Association  
Belfast Unemployed Resource Centre  
Ballynaveigh Community Dev. Association  
Ballysillan Advice Service  
Barnardos Young Parents Network  
Benefit Uptake Campaign  
Causeway Women's Aid  
Chinese Welfare Association  
Civil Service Benevolent Fund  
Colin Community Groups Association  
Cookstown & Western Shores Area  
Network  
Corpus Christi Services  
Costa  
Craigavon Independent Advice Centre  
Derry Community Social Service  
Disability Action  
Dungiven Community Resource Centre  
East Belfast Independent Advice Centre  
East Belfast Mission (jobs & training ) Ltd  
East Down Rural Community Network  
Employers for Childcare  
Epic  
Falls Community Council  
Falls Women's Centre  
Fermanagh Rural Community Initiative  
First Housing Aid & Support Services  
Fold Housing Association Trust  
Galliagh Integrated Advice Service  
Galliagh Residents Advice Centre  
Gingerbread Derry  
Gingerbread NI  
Glenluce Quality Caring Centre  
Greater Turf Lodge Residents Association  
Help the Aged  
Hillcrest House Family Centre  
Housing Rights Services  
Job Assist Centres West Belfast

Liaise  
Ligoniel Improvement Association  
Limavady Community Development Initiative  
Link Community Association  
Lisburn Prisoner Support Project  
Lower North Belfast Community Council  
Marrowbone Community Association  
Mencap  
National Group on Homeworking Ltd  
Neighbourhood Assist  
Neighbourhood Development Association  
Newry & District Welfare Rights  
Newry & Mourne Carers  
Newtownards Rd Womens Group  
NIACRO  
NICEM  
North Antrim Community Network  
North Belfast Employment Centre  
North Belfast Senior Citizens Forum  
Northlands  
NUS-USI  
Omagh Forum for Rural Associations  
Omagh Independent Advice Services  
Regeneration of South Armagh (ROSA)  
Rethink  
Rosemount Resource Centre  
Rural Support  
Shelter NI  
South Antrim Rural Network  
Southcity Resource & Development Centre  
Special Educational Needs Advice Centre  
Springfield Charitable Association  
Steer Mental Health Org.  
Tar Isteach  
The Nucleus  
The Presbyterian Orphans & Children's  
Society  
The Resource Centre Derry  
University of Ulster Students Union  
Vine Centre  
Wave Trauma Centre  
Windsor Women's Centre

# Membership

# Statement of Financial Activities for Year Ended 31 March 2004

	Note	Unrestricted	Restricted	Total 2004	Total 2003
Income		£	£	£	£
Grants received	2	181,099	146,522	327,621	211,038
Membership fees and insurance		16,260	-	16,260	11,977
Training and other income		5,404	-	5,404	8,179
Bank interest received		181	-	181	635
Contribution to programmes		928	-	928	1,418
		<u>203,872</u>	<u>146,522</u>	<u>350,394</u>	<u>233,247</u>
<b>Expenditure</b>					
Redistribution of grant income		-	14,910	14,910	-
Welfare Reform grants payable		-	31,174	31,174	-
Salary costs		159,039	24,950	183,989	147,620
Travelling expenses		5,614	1,005	6,619	4,384
Computer equipment		-	3,677	3,677	12,811
Premises costs		18,704	37	18,741	17,604
Telephone, postage, stationery		8,060	7,050	15,110	13,134
Website development		-	5,961	5,961	808
Staff recruitment and training		3,618	7,240	10,858	10,678
Subscriptions and affiliation		692	-	692	1,001
Conference costs		2,515	357	2,872	1,005
Publicity, literature		3,473	2,812	6,285	3,602
Bank charges		595	45	640	143
Audit and accountancy		2,508	259	2,767	1,375
Sundry expenses		266	478	744	2,942
Depreciation		1,036	-	1,036	-
Contribution from programmes		-34,317	34,317	-	-
		<u>171,803</u>	<u>134,272</u>	<u>306,075</u>	<u>217,107</u>
<b>Surplus for year</b>		<b>32,069</b>	<b>12,250</b>	<b>44,319</b>	<b>16,140</b>
<b>Balance at start of year</b>		<b>23,285</b>	<b>9,859</b>	<b>33,144</b>	<b>17,004</b>
<b>Balance at end of year</b>		<b>55,354</b>	<b>22,109</b>	<b>77,463</b>	<b>33,144</b>

## Balance Sheet as at 31 March 2004

	Note	2004 £	2003 £
<b>Fixed Assets</b>			
Tangible assets		3,107	
<b>Current Assets</b>			
Cash at bank		62,532	24,796
Cash on hand		182	44
Grants receivable		42,082	15,028
Prepayments		-	1,574
		<u>104,796</u>	<u>41,442</u>
<b>Current Liabilities</b>			
Accrued expenses		-30,440	-8,299
<b>Net Current Assets</b>		<u>74,356</u>	<u>33,143</u>
<b>Net Assets</b>		<u>77,463</u>	<u>33,144</u>
<b>Represented by</b>			
<b>Unrestricted Funds</b>		55,354	23,285
<b>Restricted Funds</b>		22,109	9,859
		<u>77,463</u>	<u>33,144</u>

2003/04 saw a significant growth in advice<sup>ni</sup>, both in terms of total income and expenditure and the level of service provision. Grant income rose by 55% to £327,261, largely as a result of our new programmes. Rigid controls over costs have given rise to a surplus for the year of £32,069 which when added to our funds brought forward leaves us with reserves totalling £55,354. This represents between 3 and 4 months' running costs, well within the Charity Commissioners' guidelines on reserves. There are no grounds for complacency, however, as the move to new premises in the current financial year, coupled with planned organisational changes, will see an erosion of this reserve.



# Mission & Values

## **Vision**

Our vision is of a well resourced, innovative and professional advice sector capable of meeting the full range of information, advice and advocacy needs of individuals and communities throughout Northern Ireland.

## **Mission**

advice<sup>ni</sup>'s mission is to provide leadership, representation and support to its members to facilitate the delivery of high quality, sustainable advice services.

## **Our Values**

- ▶ Respecting the independence of members
- ▶ Addressing the needs of our members in a fair and equitable way
- ▶ Representing members' interests fairly and equitably
- ▶ Being accountable and transparent through involving our members and keeping them informed of our work
- ▶ Respecting and promoting the diversity of our membership
- ▶ Striving to provide a quality, professional and relevant service to our members
- ▶ Promoting equality and social justice
- ▶ Maintaining confidentiality in our dealings with members

## **Our Members' Value**

- ▶ Quality, accessible and independent advice which is given free;
- ▶ Advice services which are impartial and non-judgmental and respect the individual's dignity
- ▶ Advice which is wholly confidential and accountable to the public;
- ▶ Independent advice, which is free from statutory or private control;
- ▶ Advice services which are aimed specifically at encouraging pluralism and overcoming social exclusion;
- ▶ Services which strive to promote equality and social justice.