

Advocating Together (Dundee) SCIO

Receipts and Payments

for the year ended

31 March 2019

Scottish Charity No: SC026064

Advocating Together (Dundee) SCIO

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Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2019

Reference and Administrative Information

Charity Name: Advocating Together (Dundee) SCIO

Charity Registration Number: SC026064

Contact Address: 13 Ryehill Lane
Dundee
DD1 4DD

Trustees:

Chairman: Bill Robertson
Secretary: Sandy Penman (resigned 11 June 2019)
Treasurer: Gemma Matthew

Murray Simpson
Royce Barton
Cathy Dyer
Kris Stevenson
John McMillan (appointed 22 May 2018)
Luke Burr (appointed 27 August 2018)

Independent Examiner: Laura Quinn ACCA
19 Dighty Street
Monifieth
Angus
DD5 4UG

Bankers: Unity Trust
9 Brindley Place
Birmingham
B1 2HB

Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2019

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

Advocating Together (Dundee) SCIO is an unincorporated association governed by its Constitution.

Recruitment and Appointment of Trustees

The charity trustees are appointed at the AGM or during the course of the year by the Board. The trustees are appointed based on their backgrounds to provide a representative Board.

Trustee induction & training

In addition to attending a short induction session, all new members of the Board of Trustees are provided with a copy of OSCR's publication "Guidance for Charity Trustees – acting with care and diligence" when appointed. Development days are held annually.

Organisation

Day to day management of the charity is delegated to the Director, Carina Mitchell. The Board of Trustees meets every six weeks, or more frequently if required, to review all aspects of the Charity's affairs. The Director attends the meetings of the Board of Trustees to report on the charity's activities and participate in strategic discussions.

OBJECTIVES AND ACTIVITIES

The objectives of the charity are:

the relief of need and to promote the benefit of persons with learning disabilities and/ or complex communication needs and/ or autistic spectrum disorder, living in Scotland by:

- endeavoring to improve the conditions of life for people with learning disabilities and/ or autistic spectrum disorder;
- seeking to safeguard and promote the integrated living of members with learning disabilities and/ or autistic spectrum disorder of any kind and, by action, change and remove the constraints imposed on such persons by society and authority;
- promoting the understanding and awareness of the rights of members with learning disabilities and/ or autistic spectrum disorder of any kind, their families and their carers;
- representing the views of its members through the support of a User Views Involvement Group or collective advocacy. Defend and safeguard people with learning disabilities and/or complex communication needs and/or autism spectrum disorder's human rights through collective advocacy to have a stronger voice and to have as much control as possible of their own lives. Help the person/ group to get the information they need to make real choices about their circumstances and support the person/group to put their choices across to others. An Independent advocate may speak on behalf of people who are unable to do so for themselves;
- the advancement of education through the development of awareness raising sessions, workshops and training on various topics to include imaginative communication, reconciliation, disability awareness, inclusion, safety and person-centered approaches through "Tutti", our learning and innovation brand;
- And in furtherance thereof, doing any other lawful act which will further the stated objectives of Advocating Together (Dundee) SCIO.

Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2019

ACHIEVEMENTS AND PERFORMANCE

During the year the charity has:

- Offered our views to the city's Health & Equalities officer on health services working with people with LD/ASD
- Contributed to the redesign of the part-time supported education programme at Dundee & Angus college
- Played a role on the Keys to Life expert group
- Offered our experience and suggestions at an event on the Mental Health & Learning Disability Service Redesign
- Took part in a consultation about changing the laws surrounding Hate Crime
- Acted as Meeters & Greeters at an event at the V&A to celebrate the Rank Foundation place-based project
- Taken on a Professional Advocacy contract from the Dundee Health & Social Care Partnership.
- Become recognised for the Saltire Awards, which celebrate young volunteers.
- Signed up additional Keep Safe Places, before handing lead responsibility to Police Scotland.
- Hosted a Dundee Safe Place Initiative Engagement Event, focused on research findings from University of Dundee.
- Undertaken initial work in the development of our "Tutti" educational offer with support from The Rank Foundation.
- Developed our team of Communication Champions to quality check Keep Safe Places with support from Dundee City Council's Common Good Fund.

FINANCIAL REVIEW

The charity has made a deficit for the year under review amounting to £901 (2018 - £9,870 surplus), which has been transferred to reserves. The level of unrestricted reserves held as at 31 March 2019 was £44,001 (2018 - £36,798) and a further £23,560 (2018 - £31,664) of restricted funds were held.

Reserves Policy

The Board of Trustees has adopted a reserves policy which ensures the charity's continuing ability to meet its objectives.

PLANS FOR FUTURE PERIODS

During the year 2019/20 we shall:

- Continue to develop our Professional Advocacy role with particular focus on people in institutional care.
- Continue to develop the role of our Communication Champions.
- Continue to develop 'TUTTI' our learning and innovation brand which celebrates diversity and inclusion, striving to create communication exchange where everyone's voice is heard.
- Continue to develop our members, Charity Trustees, volunteers, Staff including permitted support employee's knowledge and competencies collectively and individually.
- Continue to play an active role in the Mental Health, Learning Disability Re-Design.
- Focus on volunteer recruitment and development to support the function of our self-advocacy groups.

Approved by the Trustees on 9 July 2019 and signed on their behalf by,



B Robertson
Chairman

Advocating Together (Dundee) SCIO

SC026064

Report of the Independent Examiner

I report on the financial statements of Advocating Together (Dundee) SCIO for the year ended 31 March 2019 as set out on pages 6 to 9.

Respective responsibilities of trustees and independent examiner

The charity's trustees are responsible for the preparation of the accounts in accordance with the terms of the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006. The charity's trustees consider that the audit requirement of Regulation 10(1)(d) of the Accounts Regulations does not apply. It is my responsibility to examine the accounts as required under section 44(1)(c) of the Act and to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination is carried out in accordance with Regulation 11 of the Charities Accounts (Scotland) Regulations 2006. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records.

It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, I do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

In the course of my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that, in any material respect, the requirements:
 - to keep accounting records in accordance with Section 44 (1)(a) of the 2005 Act and Regulation 4 of 2006 Accounts Regulations, and
 - to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts Regulationshave not been met, or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



Laura Quinn ACCA
19 Dighty Street
Monifieth
Angus
DD5 4UG

9 July 2019

Advocating Together (Dundee) SCIO

Statement of Receipts and Payments Year ended 31 March 2019

	Note	Unrestricted Funds 2019 £	Restricted Funds 2019 £	Total 2019 £	Total 2018 £
Receipts					
Donations	3	4,294	-	4,294	3,503
Grants	4	-	137,755	137,755	144,985
Placement fees		240	-	240	280
Bank & deposit account interest		<u>147</u>	<u>-</u>	<u>147</u>	<u>44</u>
Total receipts		<u>4,681</u>	<u>137,755</u>	<u>142,436</u>	<u>148,812</u>
Payments					
Charitable activities	5	237	143,100	143,337	138,862
Governance costs	5	<u>-</u>	<u>-</u>	<u>-</u>	<u>80</u>
Total payments		<u>237</u>	<u>143,100</u>	<u>143,337</u>	<u>138,942</u>
Excess of receipts over payments before transfers		4,444	(5,345)	(901)	9,870
Transfers between funds		<u>2,759</u>	<u>(2,759)</u>	<u>-</u>	<u>-</u>
Excess of receipts over payments for the year		<u>7,203</u>	<u>(8,104)</u>	<u>(901)</u>	<u>9,870</u>

Advocating Together (Dundee) SCIO

Statement of Balances as at 31 March 2019

	Unrestricted Funds 2019 £	Restricted Funds 2019 £	Total 2019 £	Total 2018 £
Bank & deposit account balances				
Cash & bank balances at start of year	36,798	31,664	68,462	58,592
Movement in year:				
Excess of payments over receipts for the year	<u>7,203</u>	<u>(8,104)</u>	<u>(901)</u>	<u>9,870</u>
Cash & bank balances at end of year	<u>44,001</u>	<u>23,560</u>	<u>67,561</u>	<u>68,462</u>
Liabilities				
Estimate of outstanding bills	<u>2,534</u>	<u>-</u>	<u>2,534</u>	<u>2,164</u>
	<u>2,534</u>	<u>-</u>	<u>2,534</u>	<u>2,164</u>

The Accounts were approved on 9 July 2019 and signed for and on behalf of the Trustees by:



G Matthew, Treasurer

Advocating Together (Dundee) SCIO

Notes forming part of the financial statements

For the year ended 31 March 2019

1. Trustees remuneration and related party transactions

a) No trustee or connected person received remuneration during the year.

b) No expenses were reimbursed to any trustee during the year.

2. Nature and purpose of funds

Movements in Funds

	At 1 April 2018 £	Receipts £	Payments £	Transfers £	At 31 March 2019 £
Restricted Funds					
RANK – Dundee Safe Place Initiative	17,019	-	(14,666)	-	2,353
Health & Social Care Partnership	1,494	100,805	(100,850)	-	1,449
Integrated Care Fund	1,714	-	(1,588)	(126)	-
Big Lottery	2,895	-	(2,895)	-	-
Common Goods Fund	-	8,060	(5,746)	-	2,314
DSEN	-	1,500	(1,500)	-	-
Dundee Youth Fund	1,052	-	(1,050)	(2)	-
RANK – Tutti	-	20,000	(2,556)	-	17,444
RANK – Time to Shine	7,490	7,390	(12,249)	(2,631)	-
	<u>31,664</u>	<u>137,755</u>	<u>(143,100)</u>	<u>(2,759)</u>	<u>23,560</u>
Unrestricted Funds					
General Fund	36,798	4,681	(237)	2,759	44,001
Total Funds	<u>68,462</u>	<u>142,436</u>	<u>(143,337)</u>	<u>-</u>	<u>67,561</u>

Purposes of Restricted Funds

RANK – Dundee Safe Place Initiative: core funding to develop the Dundee Safe Place Initiative and to further the charitable objectives.

Health & Social Care Partnership: core funding to provide Independent Advocacy and further the charitable objectives.

RANK – Time to Shine: funds to cover the costs of Time to Shine intern placements.

Integrated Care Fund: funds to assist in the Champion Project.

Big Lottery: funds to assist in the refurbishment of the property.

Dundee Youth Fund: funds allocated to the TuttiYP (Young Persons self-advocacy group) to organise an event to celebrate the Year of the Young Person

3. Donations

	Unrestricted Funds 2019 £	Restricted Funds 2019 £	Total 2019 £	Total 2018 £
Donations	4,294	-	4,294	3,503

4. Grants

Health & Social Care Partnership	-	100,805	100,805	81,350
Dundee Youth Fund	-	-	-	1,125
RANK	-	27,390	27,390	47,155
Big Lottery	-	-	-	9,907
DCC	-	8,060	8,060	-
DSEN	-	1,500	1,500	-
Integrated Care Fund	-	-	-	5,448
	<u>-</u>	<u>137,755</u>	<u>137,755</u>	<u>144,985</u>

Advocating Together (Dundee) SCIO

Notes forming part of the financial statements For the year ended 31 March 2019

5. Analysis of Payments

	Unrestricted Funds 2019 £	Restricted Funds 2019 £	Total 2019 £	Total 2018 £
<i>Charitable Activities</i>				
Salaries and pension	-	103,116	103,116	89,179
Volunteer expenses	-	2,477	2,477	1,434
Travel expenses	-	1,287	1,287	2,103
Training	-	2,343	2,343	7,705
Hospitality	-	1,742	1,742	1,527
Rent	-	3,727	3,727	3,622
Heat and light	-	1,310	1,310	843
Insurance and memberships	-	1,600	1,600	1,811
Cleaning	-	585	585	556
Computer, stationery and publicity	-	4,786	4,786	2,123
Unicorn IT	-	-	-	600
Shackleton/1 Office IT	-	5,238	5,238	2,345
Supported employment payments	-	4,453	4,453	5,403
Other expenses	189	488	677	297
Health, safety and maintenance	-	126	126	252
Telephone and internet	-	1,349	1,349	1,122
Payroll fees	-	876	876	762
Your Say and PR	-	3,091	3,091	984
Administration expenses	-	-	-	1,449
Recruitment costs	-	-	-	1,059
TUTTI development	-	-	-	1,631
Refurbishment	-	4,506	4,506	12,049
Credit card fees	48	-	48	6
	<u>237</u>	<u>143,100</u>	<u>143,337</u>	<u>138,862</u>
<i>Governance Costs</i>				
Independent Examiner's fee	-	-	-	80