

Advocating Together (Dundee) SCIO

Receipts and Payments

for the year ended

31 March 2020

Scottish Charity No: SC026064

Advocating Together (Dundee) SCIO

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Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2020

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), position vacant
Treasurer: Gemma Matthew

Murray Simpson
Royce Barton
Cathy Dyer
Kris Stevenson
John McMillan (resigned 17th December 2019)
Luke Burr

Independent Examiner:

Andrew McQueen CA
29 Ballumbie Gardens
Dundee
DD4 0NR

Bankers:

Unity Trust
9 Brindley Place
Birmingham
B1 2HB

Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2020

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

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. The Director resigned at the end of December 2019 and interim arrangements are in place pending the establishment of a new workforce plan and management arrangements.

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 2020

ACHIEVEMENTS AND PERFORMANCE

During the year the charity has:

- Held a celebration event at the Quay for our 21st anniversary attended by volunteers and members past and present.
- We developed our first Tutti workshop designed by our Communication Champions in collaboration with Dundee and Angus College. This was developed using some of our unrestricted reserves. Our first workshop was due to be delivered to the Dundee Science Centre in the week the national lockdown commenced.
- Our team of Communication Champions quality checked several Keep Safe Places with support from Dundee City Council's Common Good Fund. We have developed an offer which involves inspecting and quality assuring Keep Safe Places followed up by workshops which can be generic or tailored to individual needs. Again on the week in which the national lockdown commenced we were due to make a presentation to the Dundee Community Safety Partnership for a block funded contract to carry out these inspections and workshops.
- Continued to support our self-advocacy groups offering a variety of topics and activities led by members. Members enjoyed their summer walking groups throughout the city, this included Walk leader training for a couple of our members.
- Continued support to our Advocators and their collective advocacy role, as well as holding other groups, such as one in the Wellgate Day Centre.
- Advocators supported an event on the Keys to Life and gathering information from the wider learning disability community in Dundee, facilitating discussions and running a stall.
- Continued to work with the Dundee Science Centre on their CONNECT project, with members giving their views on how the redesigned centre should look.
- Acted as Meeters & Greeters at an event at a health screening event, informing those with learning disabilities about the importance of screening.
- Continued to develop our Professional Advocacy role and expertise within the contract from Dundee Health and Social Care Partnership and our joint working with DIAS and Partners in Advocacy.
- Reviewed and commenced the restructuring of our internal systems including tightening GDPR compliance and information management and retention.

FINANCIAL REVIEW

The charity has made a deficit for the year under review amounting to £52,898 (2019 - £901), which has been transferred to reserves. The level of unrestricted reserves held as at 31 March 2020 was £14,663 (2019 - £44,001) and a further £Nil (2019 - £23,560) 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. In this financial year there has been a strategic investment of some of our reserves in our "Tutti" educational offer, which operates on a social enterprise model.

Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2020

PLANS FOR FUTURE PERIODS

During the year 2020/21 we shall:

- Adjust to a home working mode of delivering all support to our members and advocacy partners involving virtual meetings and phone calls.
- Continue to develop our Professional Advocacy role with a new staffing structure, taking account of national guidance and regulations relating to COVID-19.
- Look to adapt or alter the role of our Communication Champions, particularly with in the varying national guidance and regulations relating to COVID-19. This may require more support and refresher sessions.
- Ensure the engagement of our Advocators in the local and national planning and commissioning agenda for learning disability and autism, and the specific issues arising within the COVID-19 pandemic.
- Await opportunities to engage with the Dundee Community Safety Partnership in resuming the bid for a block contract to provide quality assurance checks and workshops within Keep Safe Places.
- Continue to recruit and develop our members, Charity Trustees and volunteers.
- Establish a new permanent staffing and management model including people on permitted supported employment.
- Play an active role in the Tayside Mental Health & Wellbeing Programme Strategy, focusing on the Learning Disabilities and Mental Health chapter.
- Finalise the restructuring of all of our internal business management systems.
- Renew our Volunteer Friendly status.
- Undertake regular risk assessments of all activities during the ongoing COVID-19 pandemic.

Approved by the Trustees on 3 November 2020 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 2020 as set out on pages 7 to 10.

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.



Andrew McQueen
29 Ballumbie Gardens
Dundee
DD4 0NR

3 November 2020

Advocating Together (Dundee) SCIO

Statement of Receipts and Payments Year ended 31 March 2020

	Note	Unrestricted Funds 2020 £	Restricted Funds 2020 £	Total 2020 £	Total 2019
Receipts					
Donations	3	1,034	-	1,034	4,294
Grants	4	-	112,201	112,201	137,755
Placement fees		-	-	-	240
Bank & deposit account interest		<u>142</u>	<u>-</u>	<u>142</u>	<u>147</u>
Total receipts		<u>1,176</u>	<u>112,201</u>	<u>113,377</u>	142,436
Payments					
Charitable activities	5	<u>30,514</u>	<u>135,761</u>	<u>166,275</u>	<u>143,337</u>
Total payments		<u>30,514</u>	<u>135,761</u>	<u>166,275</u>	143,337
Excess of payments over receipts before transfers		(29,338)	(23,560)	(52,898)	(901)
Transfers between funds		<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Excess of payments over receipts for the year		<u>(29,338)</u>	<u>(23,560)</u>	<u>(52,898)</u>	<u>(901)</u>

Advocating Together (Dundee) SCIO

Statement of Balances as at 31 March 2020

	Unrestricted Funds 2020 £	Restricted Funds 2020 £	Total 2020 £	Total 2019 £
Bank & deposit account balances				
Cash & bank balances at start of year	44,001	23,560	67,561	68,462
Movement in year:				
Excess of payments over receipts for the year	<u>(29,338)</u>	<u>(23,560)</u>	<u>(52,898)</u>	<u>(901)</u>
Cash & bank balances at end of year	<u>14,663</u>	<u>-</u>	<u>14,663</u>	<u>67,561</u>
Liabilities				
Estimate of outstanding bills	<u>1,877</u>	<u>-</u>	<u>1,877</u>	<u>2,534</u>
	<u>1,877</u>	<u>-</u>	<u>1,877</u>	<u>2,534</u>

The Accounts were approved on 3 November 2020 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 2020

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 2019 £	Receipts £	Payments £	Transfers £	At 31 March 2020 £
Restricted Funds					
RANK – Dundee Safe Place Initiative	2,353	-	(2,353)	-	-
Health & Social Care Partnership	1,449	112,201	(113,650)	-	-
Common Good Fund	2,314	-	(2,314)	-	-
RANK – Tutti	<u>17,444</u>	<u>-</u>	<u>(17,444)</u>	<u>-</u>	<u>-</u>
	<u>23,560</u>	<u>112,201</u>	<u>(135,761)</u>	<u>-</u>	<u>-</u>
Unrestricted Funds					
General Fund	<u>44,001</u>	<u>1,176</u>	<u>(30,514)</u>	<u>-</u>	<u>14,663</u>
Total Funds	<u>67,561</u>	<u>113,377</u>	<u>(166,275)</u>	<u>-</u>	<u>14,663</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.
Common Good Fund:	funds to assist in the Champion Project.
RANK- Tutti:	funds to develop the Tutti brand.

3. Donations

	Unrestricted Funds 2020 £	Restricted Funds 2020 £	Total 2020 £	Total 2019 £
Donations	<u>1,034</u>	<u>-</u>	<u>1,034</u>	<u>4,294</u>

4. Grants

Health & Social Care Partnership	-	112,201	112,201	100,805
RANK	-	-	-	27,390
DCC	-	-	-	8,060
DSEN	<u>-</u>	<u>-</u>	<u>-</u>	<u>1,500</u>
	<u>-</u>	<u>112,201</u>	<u>112,201</u>	<u>137,755</u>

Advocating Together (Dundee) SCIO

Notes forming part of the financial statements For the year ended 31 March 2020

5. Analysis of Payments

	Unrestricted Funds 2020 £	Restricted Funds 2020 £	Total 2020 £	Total 2019 £
<i>Charitable Activities</i>				
Salaries and pension	24,758	106,980	131,738	103,116
Volunteer expenses	-	1,503	1,503	2,477
Travel expenses	-	785	785	1,287
Training	-	436	436	2,343
Hospitality	2,331	1,008	3,339	1,742
Rent	-	3,799	3,799	3,727
Heat and light	-	1,272	1,272	1,310
Insurance and memberships	-	1,489	1,489	1,600
Cleaning	-	514	514	585
Computer, stationery and publicity	-	9,171	9,171	10,024
Supported employment payments	-	3,791	3,791	4,453
Other expenses	101	254	355	677
Health, safety and maintenance	-	151	151	126
Telephone and internet	-	1,063	1,063	1,349
Payroll fees	-	876	876	876
Professional fees	3,240	1,652	4,892	-
Your Say and PR	-	1,017	1,017	3,091
Refurbishment	-	-	-	4,506
Credit card fees	84	-	84	48
	<u>30,514</u>	<u>135,761</u>	<u>166,275</u>	<u>143,337</u>