

Advocating Together (Dundee) SCIO

Receipts and Payments

for the year ended

31 March 2022

Scottish Charity No: SC026064

Advocating Together (Dundee) SCIO

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Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2022

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: Position vacant (covered by Chairperson in the interim)
Treasurer: Gemma Matthew

Luke Burr
Royce Barton
Cathy Dyer
Kris Stevenson
Susan Buell

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 2022

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 Team Support Manager 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 2022

ACHIEVEMENTS AND PERFORMANCE

During the year the charity has:

- Commenced the exploration of a home working/location based hybrid model of work, involving both in-person and virtual meetings/phone calls
- Continued to support our self-advocacy groups offering a variety of topics and activities led by members. Members attended over Zoom calls.
- Continued support to our Advocators and their collective advocacy role. We have engaged our Advocators in the local and national planning and commissioning agenda for learning disability and autism. Including specific work on Dundee's Learning Disability Strategy.
- Members took part in the National Care Service consultation; feeding back their thoughts.
- 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.
- Continued the restructuring of our internal systems including tightening GDPR compliance and information management and retention.
- Continued to play an active role in the Tayside Mental Health & Wellbeing Programme Strategy, focusing on the Learning Disabilities and Mental Health chapter.
- Received funding from the Mental Health Outcome Framework to introduced an increased advocacy presence in hospital settings in partnership with DIAS.
- Undertaken accredited training in Human Rights and Advocacy, we have two accredited staff.
- Introduced a new permanent staffing and management model including people on permitted supported employment.
- Undertaken regular risk assessments of all activities during the ongoing COVID-19 pandemic.
- Renewed our Volunteer Friendly status.

FINANCIAL REVIEW

The charity has made a surplus for the year under review amounting to £36,971 (2021 - £24,150), which has been transferred to reserves. The level of unrestricted reserves held as at 31 March 2022 was £15,227 (2021 - £14,741) and a further £60,557 (2021 - £24,072) 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.

Advocating Together (Dundee) SCIO

Trustees' Annual Report Year ended 31 March 2022

PLANS FOR FUTURE PERIODS

During the year 2022/23 we shall:

- Finalise our hybrid working model.
- Await opportunities to engage with funding partners in resuming the activities for Communication Champions to provide quality assurance checks and workshops within Keep Safe Places and other settings.
- Restart self-advocacy groups in face-to-face meetings.
- Enhance and invigorate the scope of activities our Advocators are involved in.
- Stimulate and support collective advocacy within third party organisations.
- Continue to support the development of the Dundee Learning Disability Strategy.
- Re-evaluate and reshape how we deliver increased advocacy presence in hospital settings in partnership with DIAS.
- Focus on recruiting and developing our members, Charity Trustees and volunteers. With a particular focus on recruiting a Secretary to the Board.
- Energise our social media presence across platforms.

Approved by the Trustees on 12 July 2022 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 2022 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

12 July 2022

Advocating Together (Dundee) SCIO

Statement of Receipts and Payments Year ended 31 March 2022

	Note	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total 2022 £	Total 2021
Receipts					
Donations	3	668	-	668	138
Grants	4	-	135,535	135,535	113,604
Bank & deposit account interest		<u>7</u>	<u>-</u>	<u>7</u>	<u>12</u>
Total receipts		<u>675</u>	<u>135,535</u>	<u>136,210</u>	<u>113,754</u>
Payments					
Charitable activities	5	<u>189</u>	<u>99,050</u>	<u>99,239</u>	<u>89,604</u>
Total payments		<u>189</u>	<u>99,050</u>	<u>99,239</u>	<u>89,604</u>
Excess of payments over receipts before transfers		486	36,485	36,971	24,150
Transfers between funds		<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Excess of payments over receipts for the year		<u>486</u>	<u>36,485</u>	<u>36,971</u>	<u>24,150</u>

Advocating Together (Dundee) SCIO

Statement of Balances as at 31 March 2022

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total 2022 £	Total 2021 £
Bank & deposit account balances				
Cash & bank balances at start of year	14,741	24,072	38,813	14,663
Movement in year:				
Excess of payments over receipts for the year	<u>486</u>	<u>36,485</u>	<u>36,971</u>	<u>24,150</u>
Cash & bank balances at end of year	<u>15,227</u>	<u>60,557</u>	<u>75,784</u>	<u>38,813</u>
Liabilities				
Estimate of outstanding bills	<u>-</u>	<u>1,311</u>	<u>1,311</u>	<u>1,244</u>
	<u>-</u>	<u>1,311</u>	<u>1,311</u>	<u>1,244</u>

The Accounts were approved on 12 July 2022 and signed for and on behalf of the Trustees by:

G Matthew

G Matthew, Treasurer

Advocating Together (Dundee) SCIO

Notes forming part of the financial statements For the year ended 31 March 2022

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 2021 £	Receipts £	Payments £	Transfers £	At 31 March 2022 £
Restricted Funds					
NHS	-	20,000	(5,285)	-	14,715
Health & Social Care Partnership	<u>24,072</u>	<u>115,535</u>	<u>(93,765)</u>	<u>-</u>	<u>45,842</u>
	<u>24,072</u>	<u>135,535</u>	<u>(99,050)</u>	<u>-</u>	<u>60,557</u>
Unrestricted Funds					
General Fund	<u>14,741</u>	<u>675</u>	<u>(189)</u>	<u>-</u>	<u>15,227</u>
Total Funds	<u>38,813</u>	<u>136,210</u>	<u>(99,239)</u>	<u>-</u>	<u>75,784</u>

Purposes of Restricted Funds

NHS

funding to provide advocacy services in hospital settings in partnership with DIAS.

Health & Social Care Partnership:

core funding to provide Independent Advocacy and further the charitable objectives.

3. Donations

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total 2022 £	Total 2021 £
Donations	<u>668</u>	<u>-</u>	<u>668</u>	<u>138</u>

4. Grants

NHS	-	20,000	20,000	-
Health & Social Care Partnership	<u>-</u>	<u>115,535</u>	<u>115,535</u>	<u>113,604</u>
	<u>-</u>	<u>135,535</u>	<u>135,535</u>	<u>113,604</u>

Advocating Together (Dundee) SCIO

Notes forming part of the financial statements For the year ended 31 March 2022

5. Analysis of Payments

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total 2022 £	Total 2021 £
<i>Charitable Activities</i>				
Salaries and pension	-	71,034	71,034	57,945
Volunteer expenses	-	-	-	8
Travel expenses	-	433	433	55
Training	-	1,388	1,388	11,210
Hospitality	-	408	408	-
Rent	-	3,954	3,954	3,895
Heat and light	-	694	694	591
Insurance and memberships	-	1,373	1,373	1,205
Cleaning	-	279	279	210
Computer, stationery and publicity	-	10,678	10,678	6,683
Supported employment payments	-	3,539	3,539	1,154
Other expenses	117	101	218	397
Health, safety and maintenance	-	326	326	96
Telephone and internet	-	1,561	1,561	1,279
Payroll fees	-	966	966	924
Professional fees	-	1,463	1,463	3,855
Your Say and PR	-	853	853	25
Credit card fees	72	-	72	72
	<u>189</u>	<u>99,050</u>	<u>99,239</u>	<u>89,604</u>