



2021- 2022



Every voice matters!

We are here to support **you** to be heard.

FUNDED BY:



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"You have been an enormous support and brilliant during this difficult period. Just knowing you were on my side made a huge difference to my time in hospital"

Advocacy Partner

"I've never been able to open to anyone like I have with her (worker). She hasn't judged me, and knowing she has been in a similar position makes it easier for me to talk to her. She's an inspiration. I truly don't think I'd be alive if it wasn't for her"

Advocacy Partner

Board Members, Monitoring Officers and Staff

BOARD OF DIRECTORS

| | |
|----------------------|--------------------------------|
| Emma Crouch | Chair |
| Fiona Arnot | Vice Chair |
| Robin Ross | |
| Derek Stewart | |
| Deborah Cruickshanks | Treasurer (until May 2021) |
| Stephanie Wren | (from Jan 2021) |
| Martina Gamble | Treasurer (from May- Nov 2021) |
| John Grant | Treasurer (from Nov 2021) |

MONITORING OFFICERS

Terry Irvine, Service Leader, Community Mental Health and Wellbeing Services

STAFF

| | |
|--------------------|--|
| Suzanne Swinton | Chief Executive Officer and Company Secretary (until January 2022) |
| Heather MacMaster | Citizen Advocacy Project Manager (until March 2022)/ Chief Executive Officer & Company Secretary (on interim basis January – March 2022) |
| Craig Bartholomew | Interim Operations Manager |
| Sandra Stewart | Families Development Worker |
| Jackie Frame | Senior Independent Advocacy Worker |
| Fiona Bridges | Senior Independent Advocacy Worker |
| Lisa Webster | Citizen Advocacy Development Worker |
| Michelle Spink | Citizen Advocacy Development Worker (Nov 2020- Sept 2021) |
| Nicola Riach | Office Manager (until Dec 2021) |
| Linda Walsh | Office Manager (from Dec 2021) |
| Debbie Brown | Children & Young Person's Advocacy Worker (June 2020 to May 2021) |
| Nathan Corr | Children & Young Person's Advocacy Worker |
| Catherine Shephard | Children & Young Person's Advocacy Worker |
| Laurie Falconer | Peer Independent Advocacy Worker |
| Mark Rogers | Independent Advocacy Worker (from Jan 2022) |
| Lucy Mackie | Participation Worker (from Jan 2022) |
| Jackie Reid | Cleaner |

Chair's Report

This has been yet another year of change in AIA. Coming together again in person, though very welcome, brought new challenges including adjusting to working alongside colleagues again but staff rose to the occasion and worked with their usual professionalism. There have been other changes - most significantly in our management team. Our long-standing CEO, Suzanne, moved on to use her skills and knowledge in a national post and our Office Manager, Nicola, accepted a post nearer her family. Following a robust process we were delighted to appoint Heather as our new CEO. She has slotted into the role with confidence and a clear vision. Linda came to AIA at a time of great change but she has stepped into the Office Manager role with some ease. We have also made some changes to the structure of our management team with Craig now Operations Manager and the appointment of a Duty Worker to triage the ever-increasing referrals to our service. These posts have provided much-needed support to both the CEO and the staff. The number of staff has also grown and the calibre and experience of our new members complement the invaluable work of all at AIA.

The Board look forward to meeting with the staff to sharing ideas and generally getting to know each other at our upcoming development day in the summer. The Board would like to take this opportunity to thank them formally for all of their dedication and hard work over the last year and how they have embraced the challenges presented by change. Doubtless we will face new challenges in the future especially in the current climate of rising energy costs. However I am confident that, together, we will meet those with the same determination shown in the past.

It was with sadness we noted the passing of Sandy Stuart, an erstwhile Vice Convenor and staunch supporter of AIA. Sandy brought insight and humour to the Board and was renowned for his attention to detail which many of us might have overlooked!

Finally I would like to say a personal thank you for the support I have received from both staff and Board members in my role of Acting Convenor especially from Heather, John and Robin. That support has been much appreciated. A final thanks to our Citizen Advocates whose enthusiasm and commitment provide invaluable support and friendship to many. We look forward to continuing and building our partnerships.

Fiona Arnott (Acting Chair of Board)

Board Attendance

| DIRECTORS | 29/04/21 | 16/11/21 | 25/01/22 | 21/03/22 | ATTENDED | APOLOGIES |
|----------------------------------|----------|----------|----------|----------|----------|-----------|
| Emma Crouch (Chair) | ✓ | ✓ | x | x | 2 | 2 |
| Fiona Arnot (Vice Chair) | ✓ | ✓ | ✓ | ✓ | 4 | 0 |
| Deborah Cruickshanks (Treasurer) | - | - | - | - | - | - |
| Robin Ross | ✓ | ✓ | ✓ | x | 3 | 1 |
| Derek Stewart | ✓ | x | x | x | 1 | 3 |
| John Grant | - | ✓ | ✓ | ✓ | 3 | 0 |
| Stephanie Wren | ✓ | ✓ | ✓ | ✓ | 4 | 0 |
| Martina Gamble | x | - | - | - | 0 | 1 |

Chief Executive Officer's Report


We began this year with Covid-19 still affecting our work, and wider society. The team continued to embrace technology and hybrid working to ensure that individuals had access to independent advocacy. Our newer projects (Peer Independent Advocacy/Children & Young People) were able to further develop and begin working with more partners, offering access to advocacy to a wider range of people. The Citizen Advocacy project hosted some smaller scale social and learning events as restrictions eased later in the year. As we entered 2022 we rebranded and launched our new accessible website.

AIA also saw some big changes to our staff team, with two of our longest serving members, Suzanne Swinton (CEO) and Nicola Riach (Office Manager) leaving AIA after over a decade. They both played a pivotal role in the growth of AIA and in many of the team's advocacy journeys. I'd like to thank them for their role in developing the AIA that I am so proud to be a part of. We also saw the departure of some newer members of staff, -thank you for your contributions to Advocacy and the best of luck for the future.

With change, though, comes opportunity and interim arrangements put in place to support transition in our leadership allowed us to rethink organisational structure and ways of working. As we ended this reporting period, I was delighted to take on the role of CEO permanently after providing interim support since January 2022. We enter 2022/2023 with more challenge and opportunity ahead and I look forward to working alongside the board and wider AIA team as we look to develop our new strategic plan.


I'd like to finish by thanking our Board of Directors, staff, citizen advocates (volunteers) and advocacy partners for all their dedication and support over the past year. It is your collective knowledge, experience and passion that ensure people are able to have their voices heard and rights realised. AIA prides itself on being a values-based organisation, and the ability of the team to come together and continue to deliver on our vision of Angus communities in which *"every voice matters"* during this period of change and challenge is truly testament to that.

Heather MacMaster (Chief Executive Officer)



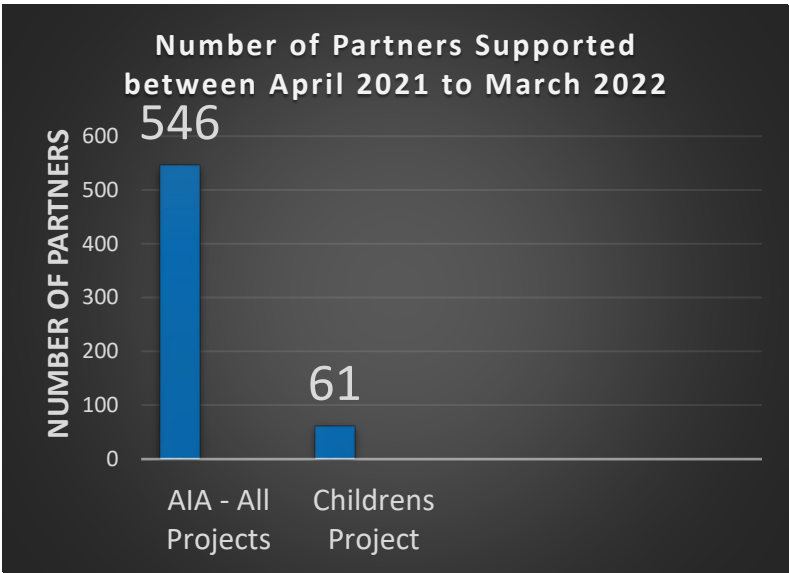
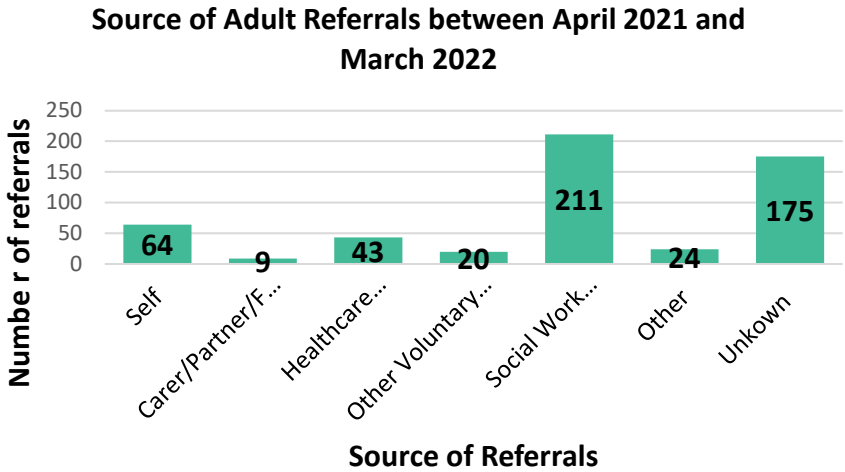
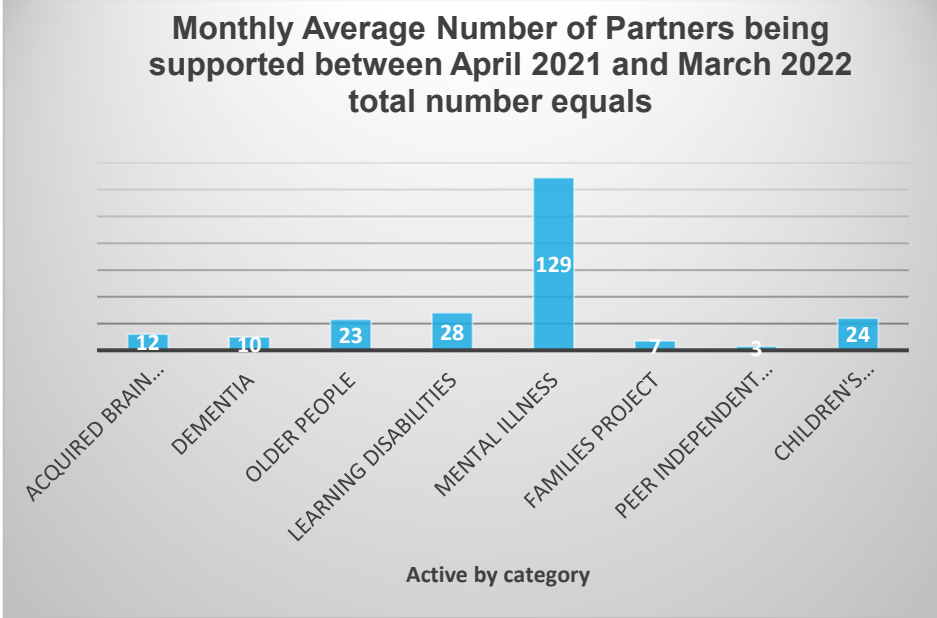
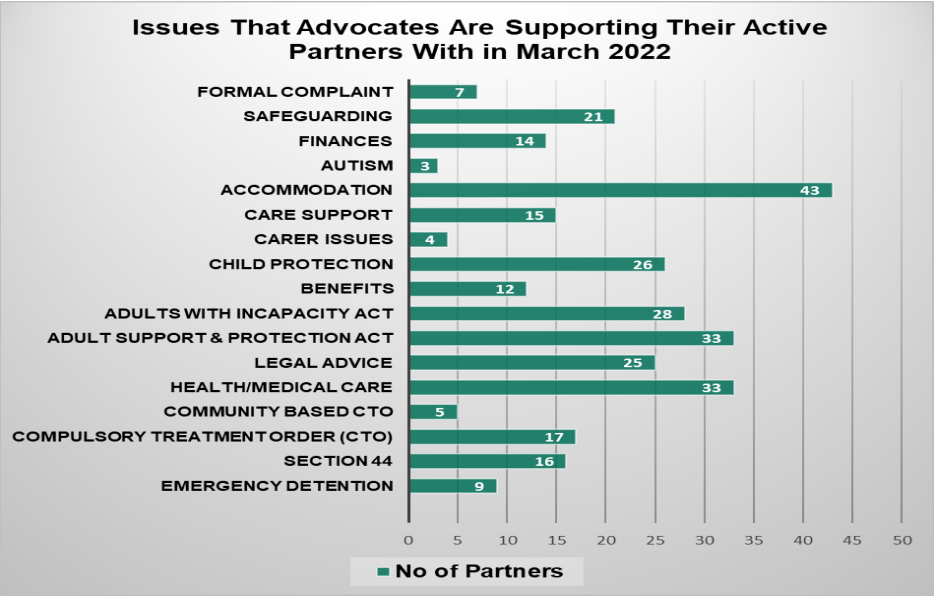
"You gave me a voice, listened to me, and didn't judge me. You have no idea what that meant to me."

Advocacy Partner

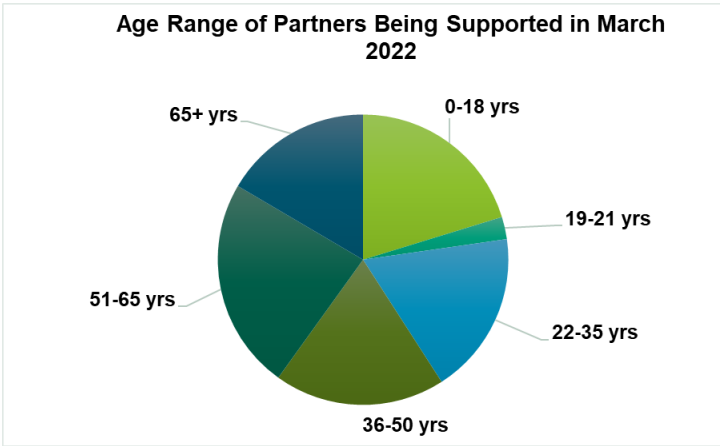


"It meant a lot to us knowing she had you to support her so thank you so much from all of us."

Daughter of Advocacy Partner



Note AIA- all projects- differs from that reported on p.6 of financial statement as this figure did not include citizen advocacy project.



Direct Advocacy Report

Overview

Key achievements over the year include:

- Continuing to provide quality advocacy during times of significant organisational changes
- Implementing the Duty Work test for change from January
- Inducting new team members Catherine Sheppard and Mark Rogers

“No two days are ever the same and I thrive on this variety. The saying “every day is a school day” comes to mind and it is certainly true for me as I continue to learn and develop and I look forward to the challenges ahead” (Jackie Frame, Duty Worker)

From my perspective as a manager, it was very motivating to see how our team members responded to changes and challenges. Having to stop and think about the “how” and “why” we do things really focussed our thinking. Team members showed creativity, energy, and determination to make improvements as well as dedication in helping achieve positive outcomes for their advocacy partners.

The team also participated in:

- Awareness raising for the Children and Young Persons resource
- Updating of AIA website and leaflets
- Contributing to short films about advocacy
- Delivering opportunities for learning and support within the team

All of AIA engaged in the induction of our new team members. It was heartening to see our values in action and how welcoming and helpful everyone had been.

The team have shown passion and drive to keep achieving and improving throughout 2021/22 and continue to deliver our goal of quality advocacy.

Craig Bartholomew
Operations Manager

Families Project

Our Families Project continued to support parents, predominantly with child protection processes. Continued restrictions throughout the period made it challenging to explore collective advocacy and parents preference was for 1:1 direct support.

34 families supported

30 statutory meetings attended

“A number of parents have become more confident at meetings and will put their own views across and ask more questions. One parent has kept their own journal on how contact has gone and records actions and comments made by workers that they can refer to at meeting if required “

Peer Advocacy

54 people were supported by the Peer Independent Advocate . The worker also began development work with the aim of establishing local forums to facilitate collective action; around common issues faced by those affected by substance use and specifically around the MATS standards.

“The collective side of my role is relatively new so the groundwork is establishing contacts and relationships which will hopefully in the future build a forum and panel that will gather views from people with lived life experience and input these into the ADP-hopefully to influence services. This is done by way of attending Recovery café, walks with services and liaising with services within the ADP who can identify individuals that would like to be involved in this new project going forward. This is new and exciting, and I will hopefully be able to update further in next year’s report”.

Children and Young Person's Advocacy

Angus Independent Advocacy (AIA) began taking referrals for Children's Advocacy in Children's Hearings (CACH) in December 2020 and continued to develop the resource throughout 2021/22. Children's Hearings work is funded through the Scottish Government and advocacy for children and young people out-with hearings is made possible via the Local Authority / Angus Health & Social Care Partnership.

This blended model is not found in every area of Scotland. The principle of barrierless access to advocacy enables children and young people to receive advocacy support (if they wish) for example, in hearings, child planning meetings, school, and health, enabling a holistic and person-centred advocacy experience. This ties in with the ethos of The Promise and principles of the United Nations Convention on the Rights of the Child (UNCRC) and helps to ensure that the child or young person has meaningful involvement in decisions affecting their lives, examples of this are detailed below along with key achievements in the past year.



We consistently receive positive feedback from both referrers and children and young people we support. We have decreased the waiting time that children and young people have to wait to access advocacy support. Successes include:

- A young person has left hospital after a long term stay and has now secured their own tenancy and is managing this well. The advocate's role supported them to share their views during this process.
- A young person who had not accessed education for over 2 years, was able to share their views with support from advocacy and is now receiving an education which is tailored to support their specific individual needs.
- Working creatively with children and young people during Covid-19- this included providing sessions outside, online and phone calls. This demonstrated commitment and flexibility of worker practice.
- Time has been spent developing child friendly resources and designing the meeting space within the office to be a welcoming environment for child and young people (see photo below)
- Supporting partners to feel confident to adapt to changes in the way hearings and meetings were run due to Covid-19. This continues to be an area that staff discuss with their partners to ensure their needs are being met- offering flexible options to attend (in person or online) is proving beneficial.

Case study

I supported a young female who initially attended online hearings due to Covid-19 and she was happy to attend these. However, once these meetings returned to face to face, her intention was to attend but she struggled to do so due to anxiety about the process. With support from her advocate, we discussed what would help her feel more confident and in control to feel less stressed about the whole process. After a period of taking time to establish a trusting relationship with her, we were able to design and create a set of laminated cards, so that she was able to share her needs without having to verbalise these. Examples of what she wanted to include, were:

'Can I take 5 minutes, I don't want to talk about this, can I go to the toilet?'

By using these cards, she felt empowered, had more control over the meeting proceedings and felt safer in sharing her views. This experience demonstrated the Importance of being led by the needs of the individual partner and being creative and responsive in our approach. It was a positive experience for her, resulting in her feeling happy to attend the next meeting.

As a direct result of this partner's creativity, staff intend to create a bank of these cards for other children and young people to access and personalise for themselves.

Citizen Advocacy Project

The Citizen Advocacy Team have just finalised their 5th year of funding from The National Lottery. It has been a busy year with a few staff changes, challenges of Covid restrictions and a different way of working whilst awaiting news on funding. The focus of the project over the end of the last year has been to support existing partnerships and tie up matches from the unmatched Citizen Advocates and partners.

The plans we had for taking the project forward changed at times as the focus was to make sure that existing partnerships were supported and that the staff team had support to do this.

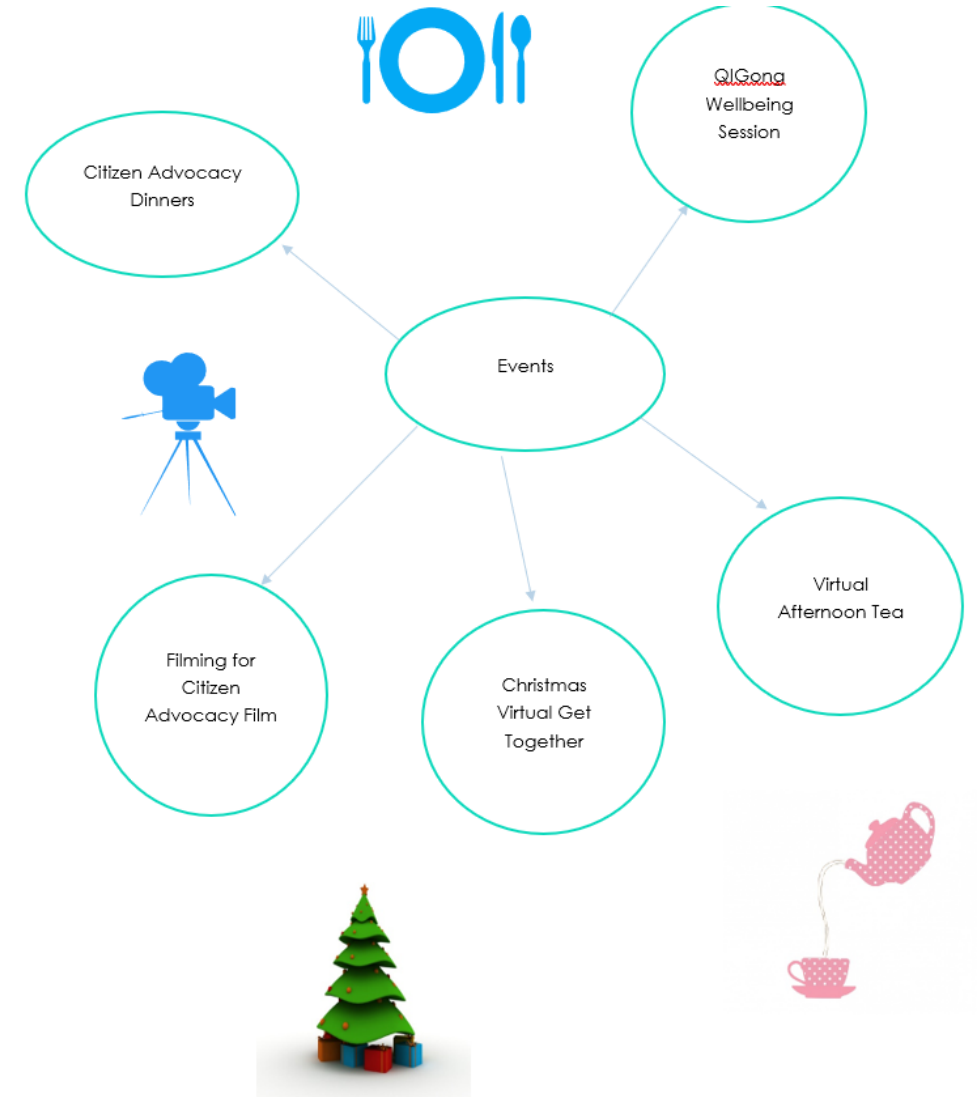
Key Achievements:

- Adapting our learning sessions so they can be delivered online
- Matching partners and citizen advocates
- Awareness Raising to organisations
- Citizen Advocacy Development Day
- Training for new ways of working such as using Microsoft Teams and SharePoint
- Familiarising ourselves with the community, different workers and groups post Covid
- Recruitment of Participation Worker to support the steering group

Challenges:

- At times we have found it difficult to engage people in online sessions
- Not being able to do so much face to face awareness raising

Over the past five years of funding, a total of 123 partners were supported via the citizen advocacy project and we worked with 90 citizen advocates (volunteers)



'It has been good using my strengths to support someone. It is good to see my Citizen Advocacy partner having her voice heard and feeling empowered.' Citizen Advocate
06.10.21

I am really excited to have someone just for me. I don't have any friends; I am looking forward to maybe meeting more new people through my advocate" CA Partner
23.06.21

'If I didn't have my Citizen Advocate, I don't know what I'd do. She helps me to understand things and helps me when I need it. I'm glad I met people from Angus Independent Advocacy.' CA Partner 28.09.21

Impact of the Participation worker on the Citizen Advocacy Steering Group:

The three members of the Steering group have all given feedback about whether the appointment of a Participation Worker has benefited them.

The individuals became part of the Steering group when it was formed a few years ago in order to help represent people who have difficulty having their voice heard in society.

The recruitment of a Participation worker has generally been seen as a positive addition to facilitate this process. I meet with the committee members who need support before meetings and help them to participate during the meetings.

"Lucy helps me to understand by explaining clearly what things mean as I sometimes find things hard to understand. I feel more comfortable coming to the meetings if I know Lucy is there to help me. I think I participate more because she is there"

"I think it's very helpful that we have Lucy there to speak to before the meetings so that we feel prepared and can get our voice heard more during the meetings"

"Lucy helps me prepare for the meetings and understand the papers better. There's a lot of information and she makes it easier to understand. I feel more confident to speak in the meetings because of this."

The challenges have been how to best facilitate this over zoom. It is widely felt that meetings in person are easier to participate in and the members feel more comfortable this way, also in smaller groups which became apparent during the training we had with Kinharvie on Terms of Reference in order to help make the meetings more effective. I am therefore trying to meet the members as much as possible in person. I feel that in the time I have had, I have developed good relationships with all the members I am helping so they now feel they can approach me with any issues before or during the meetings.

Angus Independent Advocacy

(A company limited by guarantee)

Scottish Charity No: SC025687

Company No: SC220447

Annual Report & Financial Statements

For the year ended

31 March 2022

Chris Smith BSc (Hons) FCIE
Independent Examiner and Charity Advisor
Glascairn Cottage, Aytounhill, Cupar, Fife KY14 6JH
Tel: 07791 260850
Email: chris@glascairn.org.uk

Annual Report & Statement of Account

Year ended 31 March 2022

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Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2022

The Trustees (who are also the Directors of the company for the purposes of company law) present their report together with the financial statements and the independent examiner's report for the year ended 31 March 2022.

Reference & Administrative Information

| | |
|---|---|
| Charity and Company Name: | Angus Independent Advocacy |
| Charity Number: | SC025687 |
| Company Number: | SC220447 |
| Registered Office & Principal Address: | 69 High Street Arbroath Angus DD11 1AN |
| Trustees: | Emma Crouch – Convener Robin Ross Fiona Arnot - Acting Convener Derek Stewart Stephanie Wren John Grant from November 2021 |
| Others who served during the period: | Deborah Cruickshanks until May 2021 Martina Gamble until November 2021 |
| Company Secretary and Chief Executive Officer: | Heather MacMaster |
| Independent Examiner: | Chris Smith BSc (Hons) FCIE |
| Bankers | The Royal Bank of Scotland 288 Brook Street Broughty Ferry Dundee DD5 2AP |

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2022

Structure, Governance & Management

The charity was established in 1995 as Angus Independent Advocacy Service. In June 2001 the charity was incorporated as a charitable company limited by guarantee and is governed by its Memorandum and Articles of Association. In September 2002 the charity changed its name to Angus Independent Advocacy (AIA).

The management of AIA is the responsibility of the Charity Trustees who form the Board of Directors and who are elected or co-opted under the terms of the memorandum and articles of association. Members elect directors at the AGM with one third of the Board (the longest serving) retiring each year. Retiring Directors are eligible to be re-elected.

New Trustees undertake a period of orientation to give them knowledge of what the charity does and how the charity can benefit from their input. They are also issued with an induction pack which explains their rights and responsibilities within the charity.

Objectives & Activities

Angus Independent Advocacy is established to advance education and relieve poverty among people who need community care within Angus, particularly those experiencing mental illness, learning disabilities, dementia, an acquired brain injury or who may be an older person. It aims to do this by promoting advocacy services and advancing the education of the public about issues surrounding advocacy as they relate to people experiencing mental illness, learning disabilities, dementia, an acquired brain injury or who may be an older person.

To achieve the above AIA provides independent advocacy services to individuals within Angus who are:

- on their own or have no one to defend their interests, or
- unable to speak up for themselves and have:
 - a Mental Illness
 - a Learning Disability
 - an Acquired Brain Injury
 - Dementia, or
 - are an older person.

Independent Advocacy is provided free to users of the service using paid staff and volunteers.

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2022

Achievements & Performance

Angus Independent Advocacy collects data from all advocacy partnerships. We do this to help us to understand the difference independent advocacy support is making in people's lives. We are committed to understanding what is working well and what needs to change or improve for advocacy partners to ensure that accessing advocacy support is a positive experience. The outcomes we work towards for partners are detailed within our core grant specification, and below. These outcomes are linked to the Scottish Independent Advocacy Alliance Independent Advocacy Outcomes.

| Angus Independent Advocacy Outcomes | | |
|---|--|---|
| 1. Confidence Advocacy supports people to grow in confidence | 1. Understanding Advocacy increases peoples understanding of their rights | 2. Control Advocacy helps people gain control and agency over their own lives |
| 3. Influence Advocacy supports people to have more influence in their own lives | 4. Participation Advocacy encourages and supports the advocacy partner to participate in meetings. | 5. Presence Advocacy supports people to have a valued presence in their local community |
| 6. Involvement Advocacy encourages and supports advocacy partner's active involvement. This may be in their own/family lives, the development of advocacy or other key areas that may affect and impact their life. | 7. Information Advocacy supports people to access information in an appropriate format | |

Independent Advocacy National Outcome 1

Independent advocacy enables people to be better informed about their rights, as well as understanding their needs, wishes and the choices they have. It increases their agency and power to choose their own actions freely, as much as possible.

Linked to AIA outcomes: 1, 2, 3, 4, 8

Independent Advocacy National Outcome 2

Independent advocacy supports people to recognise, understand and challenge power imbalances that influence their lives. It enables them to challenge these imbalances, to try and realise their rights, needs, and wishes. When someone is unable to take personal action, their advocacy worker will ensure that their rights are upheld.

Linked to AIA outcomes: 3, 4, 5, 6, 7

Angus Independent Advocacy

Scottish Charity No: SC025687

Trustees' Annual Report (incorporating the Directors' Report)

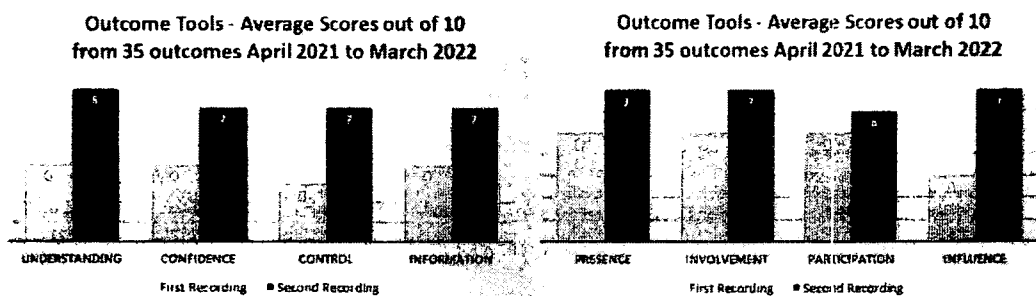
Year ended 31 March 2022

Independent Advocacy National Outcome 3

Independent advocacy supports people to know that their voices have been heard and their needs and wishes understood.

Linked to AIA outcomes: 3, 4, 5, 6, 7

We continue to use outcome tools to measure the impact of advocacy support against the above outcomes. Where possible, workers support individuals to complete these at the start and end of the advocacy partnership. The complexity of the work over the past year, has meant it has not been appropriate or possible to complete outcome tools for as many partners. We have completed comparison outcome tools (beginning and end of partnership) for 35 partners during this period. Overall, we supported 480 people. This is a slight decrease compared to 2020-2021 (486), and still lower than pre covid.



Much of our support has continued to focus on statutory process, with mental ill health remaining an enduring reason for referrals to advocacy. The impacts of lockdown continue to be seen. We have seen an increase in partners coming to advocacy with multiple and complex issues having been disconnected from communities and services. This has resulted in individuals becoming unwell and going unnoticed until crisis point then becoming subject to multiple pieces of legislation. For example, we have supported some partners who have been affected by a Compulsory Treatment Order, Adult Support and Protection, and Adult with Incapacity measures. This means intensive and sometimes longer-term support has been required.

We have also seen an increase in housing and problems with living environment. Individuals have been either unsatisfied with some aspect of property or had issues with neighbour. Again, this could be attributed to covid restrictions and people having to stay home for longer periods of time. An example of this impacting on the team and capacity was a situation where workers were supporting different members of the same street due to disputes.

Outcome tools continue to show progress in all areas towards key advocacy outcomes. The areas we saw the most noted progress for advocacy partners was in the areas of **Understanding, Control, and Influence**.

Angus Independent Advocacy

Scottish Charity No: SC025687

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2022

When we asked what change happened because of advocacy, partners told us:

"I feel I am now being listened to"

*"I was able to have my voice
heard at meetings"*

*"I was able to make my own
decision on what to do"*

*"I was able to say what I wanted to
say, and I was listened to"*

*"Having you beside me increased
my confidence hugely"*

Through the feedback survey, partners reported improvements in:

| | |
|--------------------------------|-----|
| Confidence | 89% |
| Understanding of issues | 93% |
| Access to information | 94% |
| Feeling in control | 87% |
| Influence over others | 76% |
| Involvement in decision making | 84% |
| Accessing support | 80% |
| People in their life* | 60% |

*Notably this was only 46% in the previous year- much of which was impacted by lockdown(s).
What is working well?

Overall, the feedback about advocacy is positive; showing that this support is making a genuine difference in people's lives and contributing to individual, organisational and national outcomes.

Partners told us that they felt **supported, listened to, and understood** by their advocacy worker. Advocacy has resulted in the majority feeling more **confident**, having better **understanding of issues** and increased **access to information**. All of this meant people felt they had **greater control** of their lives.

What do we need to change or improve?

The majority of those who responded told us that they were happy with their advocacy support and had no suggestions for change. Some comments highlight the desire for **more time** with advocacy workers and **earlier access** to advocacy, as well as increased **face to face contact**. As covid restrictions eased, we returned to office working and were able to offer individuals the choice as to how they would prefer to have advocacy support (face to face, phone, video call or a mix of these).

Angus Independent Advocacy

Scottish Charity No: SC025687

Trustees' Annual Report (incorporating the Directors' Report)Year ended 31 March 2022

Suggested areas for improvement:

- Continue to make strategic links with key people to raise awareness of our resource (All Projects)
- Regular educational sessions for multi-agency staff through Protecting People Angus
- Increased community presence (awareness materials, attendance at key events)
- Ensure individuals are aware that they have a say regarding face to face/remote contact

Duty Worker Trial

We received funding through Covid-19 monies to trial a Duty Worker from January – December 2022. The worker has been able to provide continuity of support for individuals while they await an advocate as well as providing advocacy support such as meetings cover, signposting and referring to other agencies. We continued to see an increase in statutory referrals and the Duty Worker post has allowed us to continue to offer some preventative support.

Children's Advocacy

We continued to see increased demand for Children's Advocacy and the team have been able to develop more resources tailored to Children and Young People. The team have continued to network with other organisations and professionals to raise awareness of the resource, including holding open days at the AIA office.

Peer Advocacy

Our Peer Advocacy Worker has been able to successfully engage with individuals affected by substance use. They have been able to draw upon their own lived experience which has broken down barriers and stigma. We received additional funding through the Alcohol & Drug Partnership to explore collective advocacy; particularly around implementation of the MAT (Medication Assisted Treatment) standards. The worker will work in communities across Angus to set up locality-based forums.

Citizen Advocacy

Continued covid-19 restrictions made delivery of the citizen advocacy project challenging, however the team were able to continue to provide support to existing partnerships, facilitate new matches and hold some learning and social events (in person and online). We also had an independent evaluation of the project which provided positive feedback and the impact of citizen advocacy, as well as some areas for development. The Steering group held a development session to consider the future of the project, with a funding subgroup taking forward work on collaborative funding bids. We secured Commitment from angus Health & Social Care Partnership to provide match funding which will support bids to external grant providers.

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2022

Board Development & Strategic Plan

The Board worked with the previous CEO (Suzanne Swinton) to plan for transition as she moved onto pastures new. This included putting in place interim measures to support the running of AIA, and the subsequent recruitment of a new CEO. The Board also held a development evening facilitated by Kinharvie Institute to begin thinking about the strategic development of AIA. Due to staffing changes, this did not move forward as quickly as expected, with plans to hold a development day in the summer once staff were more settled in their roles. The Board recruited one new member in the reporting period.

Technology

We continued to embrace technology and began to offer individuals the choice of face to face or remote support, including use of the meeting room to join meetings remotely. Our new accessible website launched early 2022, and we began work on awareness videos to use both on the website and in training. We also began work to move to a cloud-based device management and storage system.

Future Plans

Organisational Development

The Board plan to develop their strategic plan following a development day due to take place in Summer 2022. They also plan to review the organisational structure due to the expansion of AIA over the past few years.

Children's Advocacy

The team will continue to develop resources, with the hope of enhancing participation of Children and Young people in the development of the project moving forward.

Citizen Advocacy

As we await the outcome of an application to the National Lottery Fund regarding funding for the citizen advocacy project, the team will focus on developing the steering group and supporting existing partnerships. If successful, the funding will allow us to continue and expand the project. The commitment from AHSCP means we will be able to continue supporting existing partnerships.

Duty Work

We will continue to monitor the impacts of the Duty Worker trial, with a view to seeking continuation funding if this supports increase access to advocacy.

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2022

Financial Review

A decrease in income to £411,558 (2021: £415,760) along with increased expenditure of £432,314 (2021: £328,617) resulted in a deficit for the year of £20,756 (2021: a surplus of £87,143). The deficit was funded from reserves brought forward at the start of the year so that at the 31 March 2022 the charity held total funds of £172,874 (2021: £192,810). These funds consisted of £69,636 (2021: £81,158) in the unrestricted fund, which can be spent at the discretion of the trustees and £103,238 (2021: £111,652) in the restricted fund, which has to be spent as specified by donors, see note 4.

The general or free reserves are the reserves freely available to the Trustees to use to further the charitable purposes of Angus Independent Advocacy. The general or free reserves consist of the unrestricted funds less the value of tangible assets not freely available to be spent. At the 31 March 2022 the general reserves held were £65,568 (2021: £76,548) and represent just under two month's running cost. This level of reserves is considered by the Trustees the minimum required to ensure funds are available to meet the charity's financial commitments as they fall due.

This report has been prepared in accordance with the provisions for small companies under part 15 of the Companies Act 2006, was approved by the Trustees on the 21 October 2022 and signed on their behalf by:



Fiona Arnot
Acting Convener

Angus Independent Advocacy

Scottish Charity No: SC025687

Independent Examiner's Report

I report on the financial statements of Angus Independent Advocacy for the year ended 31 March 2022 which are set out on pages 12 to 22.

Responsibilities and basis of report

The charity's trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts in accordance with the requirements of the Charities and Trustee Investment (Scotland) Act 2005 ("the 2005 Act") and the Charities Accounts (Scotland) Regulations 2006 ("the 2006 Regulations") and the Companies Act 2006.

I have satisfied myself that the charity is not subject to audit under Regulation (10)(1)(a)-(c) of the 2006 Regulations or company law and is eligible for independent examination. I have therefore examined your charity's accounts as required under section (44)(1)(c) of the 2005 Act and Regulation 11 of the 2006 Regulations. In carrying out my examination I have followed the guidance issued to independent examiners by the Office of the Scottish Charity Regulator (OSCR).

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. that accounting records were not kept as required by section 44(1)(a) of the 2005 Act and Regulation 4 of the 2006 Regulations; or
2. that the accounts do not accord with those records; or
3. that the accounts do not comply with the accounting requirements of Regulation 8 of the 2006 Regulations; or
4. that there is further information needed for a proper understanding of the accounts.

Independent examiner's statement

I have completed my examination and I have no concerns in respect of any of the above and I have found no other matters that require drawing to your attention.



Chris Smith BSc (Hons) FCIE
Glascairn Cottage
Aytounhill
Cupar
KY14 6JH

Date: 31/10/22

Statement of Financial Activities (Incorporating the Income & Expenditure Account)

Year ended 31 March 2022

| | Note | Unrestricted Funds | Restricted Funds | 2022 Total | 2021 Total |
|---|------|--------------------|------------------|------------|------------|
| Income from: | | £ | £ | £ | £ |
| Donations | 5 | - | 92,349 | 92,349 | 109,717 |
| Charitable activities | 6 | 231,329 | 87,861 | 319,190 | 306,004 |
| Bank interest | | 19 | - | 19 | 39 |
| Total income | | 231,348 | 180,210 | 411,558 | 415,760 |
| Expenditure on: | | | | | |
| Charitable activities | 7 | 244,625 | 187,689 | 432,314 | 328,617 |
| Net income/(expenditure) | | (13,277) | (7,479) | (20,756) | 87,143 |
| Transfers | | 935 | (935) | - | - |
| Actuarial gains/(losses) on defined benefit pension schemes | | 820 | - | 820 | - |
| Net movement in funds | | (11,522) | (8,414) | (19,936) | 87,143 |
| Reconciliation of Funds | | | | | |
| Funds brought forward | | 81,158 | 111,652 | 192,810 | 105,667 |
| Net movement in funds | | (11,522) | (8,414) | (19,936) | 87,143 |
| Funds carried forward | | 69,636 | 103,238 | 172,874 | 192,810 |

The statement of financial activities includes all gains and losses recognised in the period. All incoming resources and resources expended derive from continuing activities. The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006. The notes on pages 14 to 22 form an integral part of these accounts.

Balance Sheet

At the 31 March 2022

| | Note | Unrestricted Funds | Restricted Funds | 2022 Total | 2021 Total |
|--|------|--------------------|------------------|------------|------------|
| Fixed Assets | | £ | £ | £ | £ |
| Tangible assets | 8 | 4,068 | - | 4,068 | 4,610 |
| Current Assets | | | | | |
| Debtors | 9 | 2,375 | 55,957 | 58,332 | 83,469 |
| Prepayments | 10 | 3,007 | 2,562 | 5,569 | 5,460 |
| Cash at bank & in hand | | 106,915 | 64,844 | 171,759 | 158,869 |
| Total current assets | | 112,297 | 123,363 | 235,660 | 247,798 |
| Current Liabilities | | | | | |
| Deferred income | 11 | 43,400 | 15,608 | 59,008 | 43,300 |
| Creditors due within one year | 12 | 2,736 | 4,195 | 6,931 | 13,761 |
| Accruals | 13 | 378 | 322 | 700 | 1,264 |
| Total current liabilities | | 46,514 | 20,125 | 66,639 | 58,325 |
| Net current assets | | 65,783 | 103,238 | 169,021 | 189,473 |
| Total assets less current liabilities | | 69,851 | 103,238 | 173,089 | 194,083 |
| Creditors: amounts due after one year | | 215 | - | 215 | 1,273 |
| Net assets | | 69,636 | 103,238 | 172,874 | 192,810 |
| Funds of the Charity | | | | | |
| Unrestricted funds | | 69,636 | - | 69,636 | 81,158 |
| Restricted funds | | - | 103,238 | 103,238 | 111,652 |
| Total Funds | | 69,636 | 103,238 | 172,874 | 192,810 |

The directors confirm that for the financial period ended 31 March 2022 the company was entitled to exemption under section 477 of the Companies Act 2006, and no members have required the company to obtain an audit of its accounts for the year in question in accordance with section 476 of the Act. However, the accounts have been examined by an independent examiner whose report is on page 11. The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of accounts. The accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime of the Companies Act 2006. The notes on pages 14 to 22 form an integral part of these accounts.

Approved by the Trustees on the 21 October 2022 and signed on their behalf by:

Fiona Arnot

Fiona Arnot - Acting Convener

Notes to the Financial StatementsYear ended 31 March 2022

1 Basis of Preparation**1.1 Basis of accounting**

These accounts have been prepared on the basis of historic cost in accordance with: -

- (a) The Charities & Trustee Investment Act (Scotland) Act 2005, and
- (b) The Charities Accounts (Scotland) Regulations 2006 as amended
- (c) The Company's Act 2006
- (d) Financial Reporting Standard 102 (FRS102) (Effective January 2015),
- (e) Charities SORP (FRS 102) (2nd edition effective January 2019)

1.2 The charity meets the definition of a public benefit entity as defined by FRS102.

1.3 The charity is dependent on the continuing support of donors. However, the trustees have no reason to consider that this will not continue or that there are any material uncertainties about the charity's ability to continue as a going concern.

1.4. In preparing the accounts, the trustees were not required to make any judgements that would have a material effect on the numbers reported.

2 Accounting Policies**2.1 Form of Financial Statements**

The charity maintains two types of funds for accounting purposes: -

- (a) A general unrestricted fund that can be expended at the discretion of the trustees on furthering the objects of the charity, and
- (b) Restricted funds that may only be used for specific purposes. Restrictions arise when specified by the donor or when funds are raised for specific purposes.

2.2 Income

(a) Income is recognised and included in the Statement of Financial Activities (SOFA) when the charity becomes entitled to the resources; their receipt is probable; and the monetary value can be measured with sufficient reliability.

(b) Where income has related expenditure the income and related expenditure are reported gross in the SOFA.

(c) Funds received in advance and which specifically relate to a future accounting period are treated as deferred income.

Angus Independent Advocacy

Scottish Charity No: SC025687

Notes to the Financial Statements

Year ended 31 March 2022

2.3 Expenditure & Liabilities

- (a) Expenditure is accounted for on an accruals basis.
- (b) Liabilities are recognised as soon as there is a legal or constructive obligation to pay out resources; it is probable they will be paid and the monetary value can be measured with sufficient reliability.

2.4 Assets

- (a) Tangible fixed assets are capitalised if they have a value greater than £250 and can be used for more than one year. They are valued at cost or, if gifted, at their value on receipt.
- (b) Depreciation is calculated on a straight-line basis to write off the cost of tangible assets over their useful economic life as follows:
Fixtures, fittings and equipment – 20%

2.5 Debtors

- (a) Debtors are recognised at the settlement amount due
- (b) Prepayments are valued at the amount prepaid

2.6 Cash

Cash at bank and in hand includes cash and bank deposits repayable on demand

2.7 Creditors

- (a) Creditors are recognised where the charity has an obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due can be measured or estimated reliably. Creditors are normally recognised at their settlement amount, usually the invoice amount.
- (b) Accrued charges are normally valued at their settlement amount.

2.8 Taxation

The charity is not liable to income or capital gains tax on its charitable activities. Irrecoverable VAT is included in the asset cost or expense to which it relates.

3 Trustee Remuneration & Expenses

No remuneration was paid to Trustees during the year (2021 - nil).

During the year no out of pocket expenses were paid to Trustees (2021 -nil).

Notes to the Financial Statements

Year ended 31 March 2022

4. Restricted Funds**4.1 Restrictions on some Funds**

During the year the charity maintained the following restricted funds:

- Citizen Advocacy project – funded by The National Lottery and Angus Council to provide general advocacy
- Families Project – funded by Angus Health & Social Care Partnership to provide advocacy support to families
- Children's Hearings Advocacy – funded by the Scottish Government to provide advocacy for children and young people in the hearing system
- Lived experience advocacy post funded by Angus Health & Social Care Partnership
- Senior Duty Manager post funded by Angus Health & Social Care Partnership
- Citizen advocacy lived experience test of change project – funded by South East Locality Improvement Group

4.2 Movement in Restricted Funds

| Fund | Opening balance | Income | Expenditure | Transfers | Closing balance |
|--------------------------------|----------------------------|----------------|--------------------|------------------|----------------------------|
| | £ | £ | £ | £ | £ |
| Citizen Advocacy Project | 21,719 | 73,041 | 88,494 | - | 6,266 |
| Families Project | 25,907 | - | 24,230 | - | 1,677 |
| Children's Hearings Advocacy | 6,268 | 39,308 | 36,607 | (935) | 8,034 |
| Lived experience advocacy post | 57,758 | 8,995 | 29,621 | - | 37,132 |
| Senior Duty Manager | - | 35,000 | 8,737 | - | 26,263 |
| Live experience test of change | - | 23,866 | - | - | 23,866 |
| Total | 111,652 | 180,210 | 187,689 | (935) | 103,238 |

The £935 transferred from the Children's Hearing Advocacy project represents the value of capitalised assets that once purchased satisfied the restriction and were transferred to the unrestricted fund.

5. Donations

| | 2022 Total | 2021 Total |
|----------------------|-----------------------|-----------------------|
| | £ | £ |
| Donations | - | 11,722 |
| Scottish Government | 39,308 | 36,376 |
| The National Lottery | 53,041 | 59,619 |
| Corra Foundation | - | 2,000 |
| Total | 92,349 | 109,717 |

Notes to the Financial Statements

Year ended 31 March 2022

| 6. Income from Charitable activities | | 2022 Total | 2021 Total |
|--|-------------|-----------------------|-----------------------|
| | | £ | £ |
| Angus Council/NHS | | 310,195 | 235,404 |
| University of Dundee | | - | 600 |
| Angus Health & Social Care Partnership | | 8,995 | 70,000 |
| Total | | <u>319,190</u> | <u>306,004</u> |
| | | | |
| 7. Expenditure on Charitable activities | | 2022 Total | 2021 Total |
| | Note | £ | £ |
| <u>Direct costs</u> | | | |
| Staff Costs | 14 | 324,262 | 274,761 |
| Travel | | 8,548 | 1,464 |
| Volunteer expenses | | 1,498 | 266 |
| Training | | 8,731 | 3,850 |
| Printing, postage and stationery | | 2,840 | 1,442 |
| Computer and equipment | | 6,199 | 5,091 |
| Sub total | | <u>352,078</u> | <u>286,874</u> |
| <u>Support costs</u> | | | |
| Rent, rates and insurance | | 16,569 | 14,473 |
| Heat & Light | | 2,840 | 1,726 |
| Repairs and renewals | | 9,446 | 342 |
| Telephone & internet | | 7,423 | 5,920 |
| Other expenses | | 14,139 | 5,569 |
| Depreciation | | 1,980 | 1,931 |
| Cleaning | | 822 | 2,627 |
| Fees & subscriptions | | 5,489 | 5,004 |
| Bank/finance charges | | 199 | 138 |
| Accountancy | 16 | 9,039 | 2,866 |
| Recruitment costs | | 2,870 | 1,147 |
| Events | | 6,921 | - |
| Advertising | | 1,615 | - |
| Management costs | | 884 | - |
| Sub total | | <u>80,236</u> | <u>41,743</u> |
| Total | | <u>432,314</u> | <u>328,617</u> |

Notes to the Financial Statements

Year ended 31 March 2022

| 8. Tangible Assets | | Fixtures fittings & equipment |
|---------------------------|--|--|
| | | £ |
| Cost | | |
| At 1 April 2021 | | 33,021 |
| Additions | | 1,438 |
| At 31 March 2022 | | 34,459 |
| Depreciation | | |
| At 1 April 2021 | | 28,411 |
| Charge for the year | | 1,980 |
| At 31 March 2022 | | 30,391 |
| Net book value | | |
| At 1 April 2022 | | 4,610 |
| At 31 March 2021 | | 4,068 |

| 9. Debtors | 2022 Total | 2021 Total |
|--|-----------------------|-----------------------|
| | £ | £ |
| South East LIG | 23,866 | - |
| Angus Health & Social Care Partnership | 23,334 | 5,000 |
| Angus Alcohol & Drugs Partnership | - | 66,667 |
| Angus Council | 8,757 | 8,757 |
| Disability Forum | - | 70 |
| University of Dundee | - | 600 |
| Rent Deposit | 2,375 | 2,375 |
| Total | 58,332 | 83,469 |

| 10. Prepayments | 2022 Total | 2021 Total |
|------------------------|-----------------------|-----------------------|
| | £ | £ |
| Rent | 1,900 | 1,900 |
| Subscriptions | 2,925 | - |
| Grenke | - | 274 |
| Insurance | 744 | 451 |
| Tel & internet | - | 2,835 |
| Total | 5,569 | 5,460 |

Notes to the Financial Statements

Year ended 31 March 2022

11. Movement in Deferred Income

| | Balance 31/03/2021 | Funds received | Released to income | Balance 31/03/2022 |
|---|-----------------------|-------------------|--------------------------|-----------------------|
| | £ | £ | £ | £ |
| Angus Council & NHS Funding for 2021/22 | 43,300 | - | 43,300 | - |
| Angus Council & NHS Funding for 2022/23 | - | 43,400 | - | 43,400 |
| Citizen Advocacy Project for 2022/23 | - | 15,608 | - | 15,608 |
| | <u>43,300</u> | <u>59,008</u> | <u>43,300</u> | <u>59,008</u> |

12. Creditors due within one year

| | 2022 Total | 2021 Total |
|-----------------------|---------------|---------------|
| | £ | £ |
| HMRC | 3,269 | 9,949 |
| Trade creditors | 3,589 | 3,812 |
| Pension contributions | 73 | - |
| Total | <u>6,931</u> | <u>13,761</u> |

13. Accruals

| | 2022 Total | 2021 Total |
|------------------------|---------------|---------------|
| | £ | £ |
| Independent Examiner | 700 | 700 |
| Heat & Light | - | 119 |
| Fees and subscriptions | - | 300 |
| Telephone | - | 145 |
| Total | <u>700</u> | <u>1,264</u> |

14. Staff Costs

| | 2022 Total | 2021 Total |
|-------------------|----------------|----------------|
| | £ | £ |
| Salaries | 281,308 | 236,144 |
| Employers NI | 19,626 | 15,597 |
| Employers Pension | 23,328 | 23,020 |
| Total | <u>324,262</u> | <u>274,761</u> |

Notes to the Financial Statements

Year ended 31 March 2022

No employee received remuneration of more than £60,000 (2021: None).

The average monthly number of employees during the year was 14 (2021:14).

15. Pension Scheme

The charity is a member of a multi-employer defined benefit pension scheme where the underlying assets and liabilities cannot be identified on a consistent basis. The scheme is classified as a 'last-man standing arrangement'. The charity is potentially liable for other participating employers' obligations if those employers are unable to meet their share of the scheme deficit following withdrawal from the scheme. Participating employers are legally required to meet their share of the scheme deficit on an annuity purchase basis on withdrawal from the scheme. A full actuarial valuation for the scheme was carried out at 30 September 2020. This valuation showed assets of £800.3m, liabilities of £831.9m and a deficit of £31.6m. To eliminate this funding shortfall a recovery plan is in place to address the deficit with the charity paying additional contributions towards the pension deficit until 2025. The cost of these additional contributions is disclosed in the Balance Sheet under "Creditors: amounts due after one year". In May 2015, the charity was notified that it has a contingent liability, should it withdraw from the scheme, of £13,984.

16. Accountancy

| | Unrestricted Funds | Restricted Funds | 2022 Total | 2021 Total |
|-------------------------|-------------------------------|-----------------------------|-----------------------|-----------------------|
| | £ | £ | £ | £ |
| Independent Examination | 189 | 161 | 350 | 351 |
| Preparation of accounts | 189 | 161 | 350 | 349 |
| Other accountancy | 4,779 | 3,560 | 8,339 | 2,166 |
| Total | 5,157 | 3,882 | 9,039 | 2,866 |

Notes to the Financial Statements

Year ended 31 March 2022

17. Previous year information

In order to comply with FRS 102 to show corresponding amounts for the previous year for every figure in the financial statements and notes (not just the prior year totals), corresponding figures not provided elsewhere in these accounts are set out below:

17.1 Statement of Financial Activities for the year ended 31 March 2021

| | Unrestricted Funds | Restricted Funds |
|---------------------------------|-------------------------------|-----------------------------|
| Income from: | £ | £ |
| Donations | 13,722 | 95,995 |
| Charitable activities | 210,210 | 95,794 |
| Bank interest | 29 | 10 |
| Total income | 223,961 | 191,799 |
| Expenditure on: | | |
| Charitable activities | 186,958 | 141,659 |
| Net income/(expenditure) | 37,003 | 50,140 |
| Transfers | (200) | 200 |
| Net movement in funds | 36,803 | 50,340 |
| Reconciliation of Funds | | |
| Funds brought forward | 44,355 | 61,312 |
| Net movement in funds | 36,803 | 50,340 |
| Funds carried forward | 81,158 | 111,652 |

| | Unrestricted Funds | Restricted Funds |
|--|-------------------------------|-----------------------------|
| 17.2 Balance Sheet at 31 March 2021 | | |
| Fixed Assets | £ | £ |
| Tangible assets | 4,610 | - |
| Current Assets | | |
| Debtors | 3,045 | 80,424 |
| Prepayments | 3,054 | 2,406 |
| Cash at bank & in hand | 81,547 | 77,322 |
| Total current assets | 87,646 | 160,152 |
| Current Liabilities | | |
| Deferred income | - | 43,300 |
| Creditors due within one year | 9,433 | 4,328 |
| Accruals | 392 | 872 |
| Total current liabilities | 9,825 | 48,500 |
| Net current assets | 77,821 | 111,652 |
| Total assets less current liabilities | 82,431 | 111,652 |
| Creditors: amounts due after one year | 1,273 | - |
| Net assets | 81,158 | 111,652 |

Notes to the Financial Statements

Year ended 31 March 2022

17.3 Movement in Restricted Funds for 2020/21

| Fund | Opening balance | Income | Expenditure | Transfers | Closing balance |
|--------------------------------|----------------------------|----------------|--------------------|------------------|----------------------------|
| | £ | £ | £ | £ | £ |
| Citizen Advocacy Project | 8,983 | 79,629 | 66,893 | - | 21,719 |
| Families Project | 44,671 | - | 18,764 | - | 25,907 |
| Children's Hearings Advocacy | 1,708 | 36,376 | 31,816 | - | 6,268 |
| Citizen Advocacy Manager | 2,000 | - | 2,000 | - | - |
| Lived experience advocacy post | - | 70,000 | 12,242 | - | 57,758 |
| Preventative support | 3,950 | 5,794 | 9,944 | 200 | - |
| Total | 61,312 | 191,799 | 141,659 | 200 | 111,652 |

17. 4 Movement in Deferred Income for 2020/21

| | Balance 31/03/2020 | Funds received | Released to income | Balance 31/03/2021 |
|---|-------------------------------|---------------------------|-----------------------------------|-------------------------------|
| | £ | £ | £ | £ |
| Angus Council & NHS Funding for 2020/21 | 46,800 | - | 46,800 | - |
| Angus Council & NHS Funding for 2021/22 | - | 43,300 | - | 43,300 |
| | 46,800 | 43,300 | 46,800 | 43,300 |