

Every voice matters!
We are here to support *you* to be heard.

Annual Report 2022- 2023

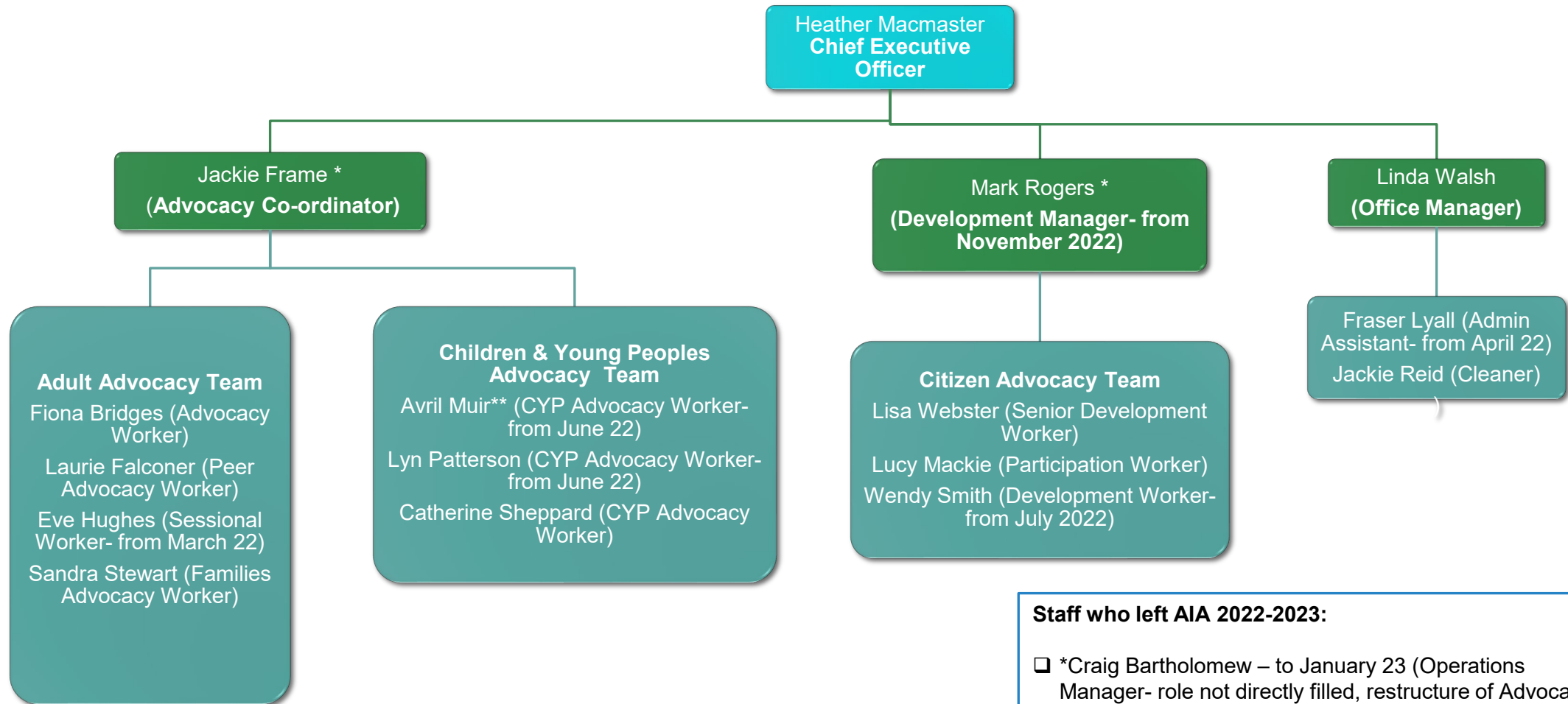
Funded by:



Contents

AIA Staff Team	Page 3
Chair's Report	Page 4
AIA Board of Directors	Page 4
Chief Executive Officer's Report	Page 5
Development Manager's Report	Page 6
Statistics	Page 7
Direct Advocacy	Page 8-9
Children and Young Person's Advocacy	Page 10-11
Citizen Advocacy	Page 11-12
Annual Report and Financial Statement	Page 13 onwards

AIA Staff Team



- Staff who left AIA 2022-2023:**
- ❑ *Craig Bartholomew – to January 23 (Operations Manager- role not directly filled, restructure of Advocacy Coordinator/ Development Manager roles)
 - ❑ ** Nathan Corr (to April 22)
 - ❑ Fraser Lyall (to March 23)
 - ❑ Sandra Stewart (to March 23)

Chairs Report

It has been another busy year for AIA and the Board. Our service is greatly in demand and the staff continue to provide essential support to some of the most vulnerable members of society. That they continue to work with such professionalism and compassion, often in difficult and emotive circumstances, is to their credit.

In July AIA hosted a Development Day led by Kinharvie at Hospitalfield House. This afforded an excellent and welcome opportunity for the Board and Staff to connect and share thoughts on shaping the AIA of the future. The feedback from the day was very positive and is influencing the development of the Strategic Plan for the next few years.



This year has seen changes in staff which have allowed changes to the structure and roles of the management team. As AIA evolves these may be further developed, but under Heather's leadership and with the unstinting support of staff, the Board are assured that any change will only strengthen AIA. That strength will allow us to meet future challenges with confidence.

The Board too has seen changes. We have said goodbye to members and wish them well. But we have also welcomed new and are benefitting from the different perspectives they brought. Sadly, we learned of the passing of a former Vice-Chair, Sandy Stuart. His enthusiasm and support for AIA, over a great number of years until he 'retired' at the age of 80, was invaluable.

On behalf of the Board, I would extend our sincere thanks to our CEO, Heather, who provides such a calm, inspiring leadership. She addresses issues with insight and creativity, skills to be envied!

My personal thanks go to the Board members whose belief in and commitment to AIA is invaluable. Your support is much appreciated

Fiona Arnot (Chair of AIA Board of Directors)

AIA Board of Directors

DIRECTORS	30/5/22	25/7/22	10/10/22	28/11/22	30/1/23	27/3/23	ATTENDED
Emma Crouch (Vice Chair)	X	√	X	X	√	X	2 / 6
Fiona Arnot (Chair)	√	√	√	√	√	√	6 / 6
John Grant (Treasurer)	X	√	X	√	√	√	4 / 6
Jim Henderson (from October 22)	N/A	N/A	√	√	√	√	4 / 4
Robin Ross	√	√	√	√	√	√	6 / 6
Derek Stewart	√	√	√	√	√	√	6 / 6
Stephanie Wren (to November 22)	X	X	X	X	N/A	N/A	0 / 4

Chief Executive Officer's Report

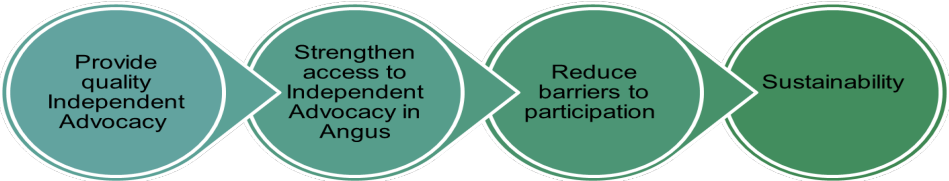
It has been another year of change and growth for AIA. Although our work has not been as impacted by restrictions as it was in 2021-2022, the effects of the pandemic were still felt across the organisation, team and advocacy partners. Partners faced increasingly complex issues, amidst the cost-of-living crisis and over stretched services. A large part of our support to adults continued to be around statutory processes such as Adult Support & Protection & Adults with Incapacity. Through our 'duty system' we were able to prioritise referrals and offer more timely support to those requiring less advocacy input, whilst ensuring those requiring more intensive support were able to access this.

Our team has continued to evolve, with long serving members of staff Craig Bartholomew (Operations Manager) and Sandra Stewart (Families Worker) leaving to embark on new adventures in early 2023. They were both passionate advocates for advocacy, and I wish them all the best for the future, along with other members off staff whom we said goodbye to this year. We also welcomed new team members who have settled in well, bringing with them lots of energy and new ideas. Increased capacity for part of the year allowed us to work with more advocacy partners, particularly through the Children & Young Person's project. A highlight was also securing continued funding for our Citizen Advocacy Project, with support from Angus Health & Social Care Partnership & The National Lottery Fund. My own introduction to the world of Independent Advocacy was via the world of Citizen Advocacy and I am delighted that we can continue to offer longer term preventative support within communities.

Over the past year, AIA has also had the opportunity to contribute to national developments in independent advocacy and has benefited from connecting with our Tayside colleagues, as well as organisations from across Scotland. It has been reassuring to know that the challenges we face here in Angus are similar to those in other areas, and we have been able to learn from each other.

I'd like to thank our wonderful Board of Directors, Staff Team and Citizen Advocates for continuing to support our vision of inclusive Angus communities where everyone understands their human rights, can be part of their local community and have a say in the decisions affecting their lives. Our Advocates (both paid and voluntary) really do go above and beyond every day to draw alongside advocacy partners and support them to have their voices heard. I look forward to working together over the coming year as we begin to implement our new strategic plan to ensure that all those who would benefit from independent advocacy can access it.

Heather MacMaster (CEO)



Strategic Themes 2023-2026

AIA strives towards inclusive communities in which all citizens who would benefit from independent advocacy can access it, in order that they can:



Our Vision

Development Manager's Report

Following a successful the Citizen Advocacy Project was awarded funding, which included a Development Manager post. Lisa Webster, Senior Development Worker, supported this role on an interim basis whilst the recruitment process was carried out. I was delighted to be offered the role and I would like to thank Lisa and acknowledge the hard work and the support she provided, and for the support I have received from the entire team throughout the handover process and in my new role.

The main goals of this role are to:

- Provide focused support to the Citizen Advocacy Team /project
- Take forward recommendations following external evaluation
- Develop the Citizen Advocacy Steering group, increase their presence and influence within the organisation & externally
- Develop volunteering within the CA project and the wider organisation
- Identify collective/group advocacy opportunities and develop resource to deliver this

A key piece of work has been liaising with Protecting People Angus to identify how the Steering Group can participate and share their lived experience to potentially influence decisions and changes in policies & approaches. This has been moving forward with commitments from PPA and AIA to ensure that this participation will be led by the Steering Group with clarity on the outcomes and benefits from this.

Other pieces of work include :

- Developing community fund raising to increase participation and raise awareness, and raise additional funds for AIA
- Awareness raising through utilising social media and digital platforms, not overlooking leaflet, posters and newsletters
- Networking to raise awareness and identify opportunities for collaborative work, support and training
- Supporting with planned events held by Citizen Advocacy Project

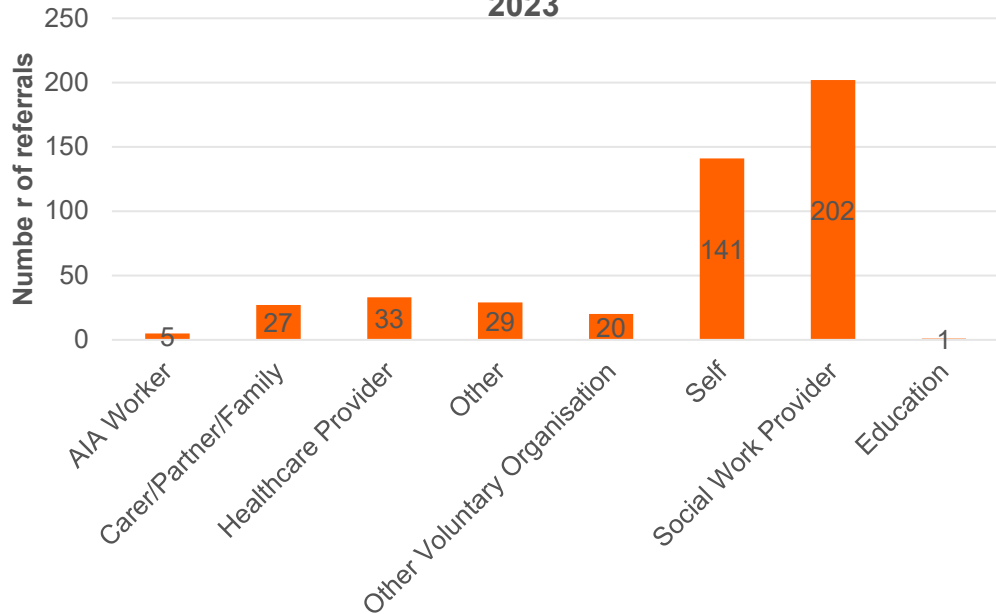
During this time, I was also asked to take on additional development and operational roles across AIA. I really appreciated the opportunity that this presented.



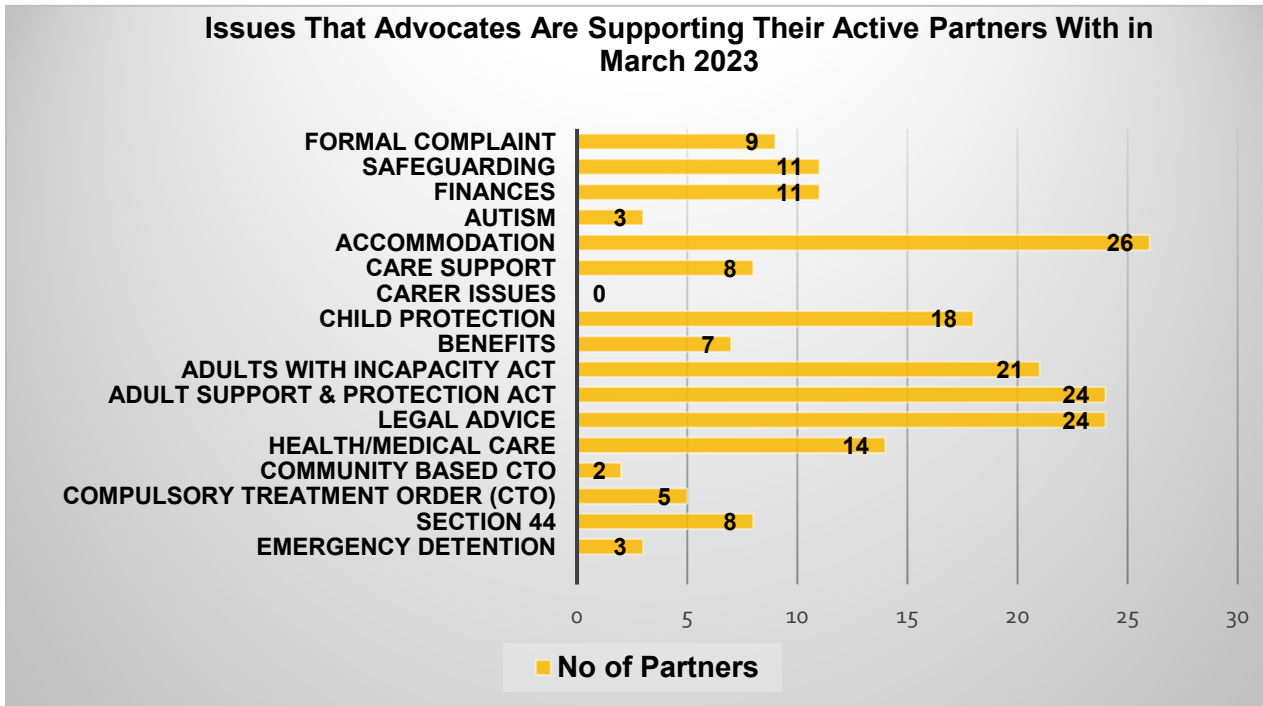
This role is still very much new but working within the Values & Principles of AIA the expectation is that it will deliver additional projects & funding to support the people of Angus, create avenues for our partners & volunteers to share their experience & have a meaningful impact & input on the policies & practices within Angus, protect & develop our current projects, develop the team skills & knowledge and streamline processes, working towards **MAKING EVERY VOICE MATTER.**

Mark Rogers (Development Manager)

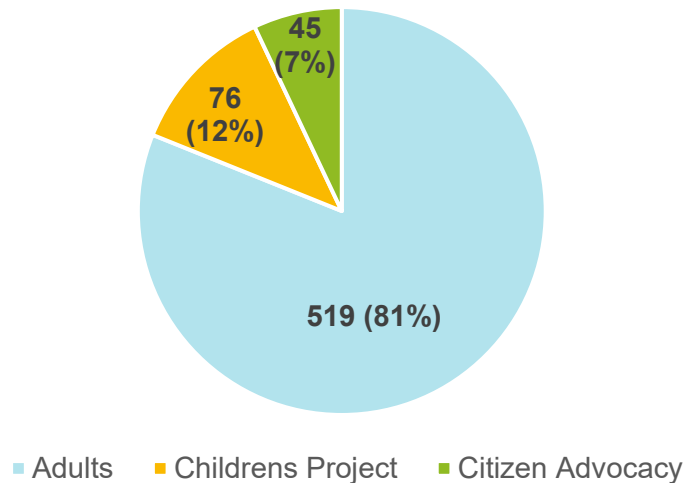
Source of Referrals between April 2022 and March 2023



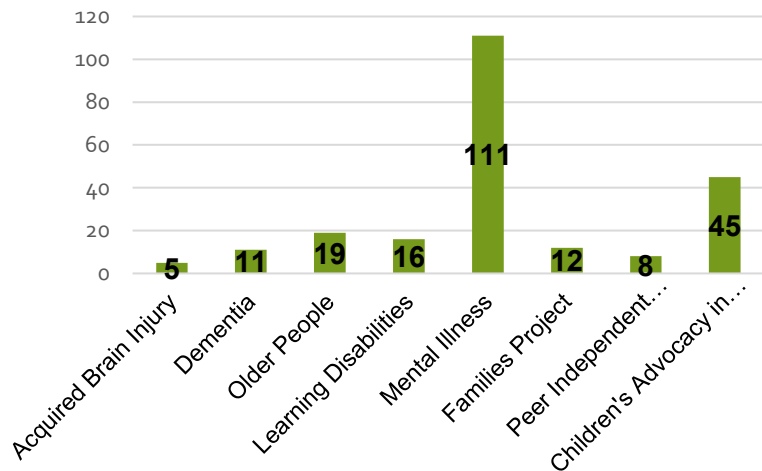
Issues That Advocates Are Supporting Their Active Partners With in March 2023



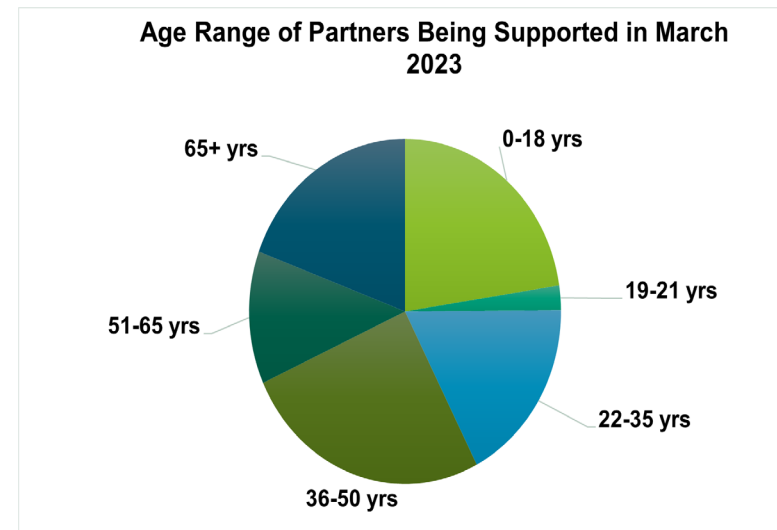
Number of Partners Supported between April 2022 to March 2023



Monthly Average Number of Partners being supported between April 2022 and March 2023



Age Range of Partners Being Supported in March 2023



Direct Advocacy

Overview

It has been another busy year for referrals and as first contact for referrals this enables me to identify any themes emerging such as common issues, lack of services or an increase in statutory processes.

What has been evident this year apart from the increasing demand for advocacy support and the complexities that people are facing, is the rise in requests from professionals asking for informal chats about the work that we do even more so, the positive effect of awareness raising by my colleagues out in the community. Referrals and enquiries will increase and from this I can clearly identify the services and areas in which the talks were held.

409 people supported through core direct advocacy resource

This shows the irrefutable impact awareness raising has in connecting to those who would otherwise be unfamiliar with the support we can offer and an area we can continue to develop moving forward. By continuing to monitor these themes, we can then prepare or make changes in order that we can continue to deliver quality advocacy.

Jackie Frame (Advocacy Co-ordinator)

“Almost sure things would have been more draconian for me if I hadn’t of had Advocacy support throughout the process”

“Talking things over with someone else & having the support there to help”

Advocacy Partners on the benefits of independent advocacy

Families Project

Our Families Project continued to support parents (26), predominantly with child protection processes. The need of parents continues to be for 1:1 direct advocacy. However, the worker has relayed common themes such as issues with communication, inaccuracies in reports and not feeling like positive progress is highlighted to relevant professionals.

“Thank you for everything ...we appreciate what you’ve done for our family”

Peer Advocacy

84 people were supported by the Peer Independent Advocate. The worker has continued to link in with the recovery cafes and the recovery community both to raise awareness of the project, and with a view to developing panels/forums to support local service development. They have completed MISTQ interviews with several individuals to influence national developments. They also continue to sit on several working groups to represent both AIA and those affected by substance use.

“You helped me to find my own voice. I knew you didn’t judge me because you’ve been where I have”.
Peer Advocacy Partner

“You are my motivation to keep going because I’ve seen how far you’ve progressed in your journey”.
Peer Advocacy Partner

Laura's Story

Laura was first referred to AIA several years ago with a view to having support around Adult Support & Protection (ASP) due to financial and domestic abuse. Laura has ongoing mental ill health and substance use issues. For the past 4 years support has been given regarding:

- ✓ ASP process (case conference, core groups, reviews as well as preparation ahead of meetings to ensure views known)
- ✓ Adults with incapacity act (support at and prior to meetings, support to access solicitor to oppose guardianship application).
- ✓ Mental Health Care & Treatment Act (detention/ tribunals)

Throughout the partnership, the advocacy worker has liaised with professionals from social work and health to raise Laura's views as well as attending various meetings or feeding in views.

Ongoing support has meant that Laura has been able to build a trusting relationship with her advocacy worker. She was on the phone to her while being detained and the worker was able to let her know that while the MHO and Dr could detain her and take her to hospital for assessment, she had a right of appeal that they would be able to help her with. Having an independent, trusted source supported Laura in agreeing to go into hospital. Had police assistance been required, that would likely have been a more traumatic experience for her.

Laura has been supported to access information. This has supported her understanding and enabled her to feel in control and to be involved in and participate in decision making processes.

“You helped me with Solicitor, professionals, and others, you've helped me with everything, I couldn't have done it alone. You've been very supportive”

ReMarkable

Thanks to recommendations received through the Governments Access to Work Scheme, I have been trialing the use of the ReMarkable paper tablet for about a year now.

The remarkable is great for developing and enhancing organisational skills, it keeps everything in one place and is accessible and easy to navigate and use. I have been able to save onto the ReMarkable all the forms that we use at various times with our Advocacy Partners, who are able to sign and complete documents on the ReMarkable, this has cut down on time spent scanning documents as I am able to email documents straight from the tablet to my email address, and then upload onto our database system. Alternatively, I can access the completed documents via the ReMarkable app on my laptop and upload them from there.

This has also been a great time saver when it comes to completing my notes, and I believe it has cut my admin time in half, which allows me more time to advocate for individuals. It's a lot easier to produce handwritten notes in between appointments rather than making use of work mobile phones to try and type notes direct onto database, which is a lengthier time-consuming process.

An additional benefit of the ReMarkable is that it is helping us meet our pledge to work Greener, it is helping us cut down on our paper use and printer ink usage, which will also have additional benefits in costs savings for the organisation. In relation to the General Data Protection Regulations, it's more secure than having paper notes as the device is password protected like our laptops and phones. We all know that Paper copies of documents are the most likely to lead to a breach in GDPR. The ReMarkable eliminates that as a risk. It is easy to use and really does feel like you're writing on paper. The ReMarkable doesn't have any applications on it or allow for any incoming information except for the laptop application which allows you to upload documents onto the ReMarkable. This means that there are no distractions when you are working on it from pop ups or emails.

I believe it has enhanced my Advocacy practice as well as saving me time, and I am looking forward to supporting the rest of the team with their own development and use of the ReMarkable. I do enjoy a ReMarkable meeting!

Fiona Bridges (Independent Advocacy Worker)

Children and Young Person's Advocacy

Two new members of staff have been employed in the children and young people's team-we now have 1 full-time and 2 part-time staff which allows us to respond to requests for advocacy in a timely fashion.

The Children and Young People's work continues to be funded by the Scottish Government which enables the provision of advocacy for children and young people (CYP) who find themselves becoming a part of the Children's Hearing's process. The number of CYP accessing advocacy support has steadily increased as a direct result of the legal requirement that advocacy is offered to CYP who are involved in Children's Hearings. As a team, we have experienced first-hand members of the Children's Panel ensuring each child is offered advocacy prior to a hearing. The Children and Young People's work also receive funding from local authority (Angus Council) which allows us to provide advocacy in other areas of CYP's lives and to those who are not identified through the Children's Hearing work. Areas of support include education, health, child planning meetings and placement reviews.

The importance of building positive relationships with partners, social work teams, education, foster carers, families and other professionals, continues to be a focus for the team. Without positive relationships, advocacy could not be successful. The staff team actively participate in forums and working groups which promote children's rights and aim to ensure children continue to be the centre of decisions made about them and shape the processes they find themselves within. These groups include 'The Promise', 'Brothers and Sister's' group and the 'Thinking about Language' Group. Participating in 'The Promise' working group allows the team to promote independent advocacy and support the voice of CYP to simplify the system for care experienced children. This includes being involved in the writing of a simple story book to explain the processes for children in the systems and creating essential/ comfort bags for children and young people moving into care.

Attending the monthly Promise Hangout group supports our aim to ensure CYP are aware of our service and build relationships to encourage CYP to access advocacy support.

Key Successes



An increase in the provision of non-instructed advocacy



Development of creative resources for working with CYP



Accessing training opportunities- the team is trained in using Talking Mats which supports CYP with communication barriers



Raising awareness of our service to a range of stakeholders (8 sessions held in the last year- with a mix of face to face and online)



Feedback from CYP, families and panel members continues to be positive about the impact of having advocacy support

K is a 14 year old who hasn't attended school and barely left his home for 8 months. He refused to engage with any services or share his views for an upcoming Children's Hearing. When advocacy and the benefits of this were explained, he agreed to this support. K had a few meetings with a team member, where he not only got dressed and left his room (a huge achievement according to mum) but engaged enthusiastically and compiled a mature and concise record of his views explaining his barriers to education, reasons behind withdrawal from everyday life and potential ways to move forward.

We asked the panel that school was not present during the meeting while we shared K's views. This seemed to empower him. K's views were shared on his behalf by staff, but the panel were so empathetic that when asked questions he chose to answer some of them himself. The panel explained that Covid had affected many young people similarly and K's situation was not his fault. They worked with him to plan a positive re-integration into education and life. K and his family were so positive after the meeting and a few weeks later K has already commenced school led home learning as a first step.



Example of a Talking Mat

Citizen Advocacy

The Citizen Advocacy Team were successful in receiving funding from the National Lottery for another 2 years to continue to further develop the resource, as well as to support existing partners. They were also successful in a 2-year funding bid from the South East Locality Improvement Group to provide lived experience support focusing on mental health in the Arbroath /Frickheim localities.

The Participation Worker continues to support members of the steering group and Board, supporting them ahead of meetings to understand any papers and enable them to feel better prepared, which allows them to have their voice heard more.

As covid restrictions have reduced the team have been working hard on raising awareness and reigniting, identifying & creating new networking avenues as the landscape has changed with the impact of Covid on the Third sector.

'He has helped me to explain things with the council and helped me to understand what is happening.'

CA Partner

'If I have an issue I can phone or message her and she gets back to me when she can, she always tried to help me.'

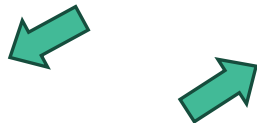
CA Partner

We go out for walks and I have someone to talk with. I know he has had his own mental health journey this makes me feel comfortable talking with him. Each time the social worker came round they recommended Citizen Advocacy and if I wanted to do it. It took a few weeks, but I phoned her back to say I would and I'm really glad I did. I think out of all the other stuff I've done this has made the most difference to me mentally. I don't feel so isolated now and I feel better about myself.

CA Partner MH



The Promise Hangout Halloween Party Oct 22



Awareness Raising Summer 22



Key Achievements:

- Securing core funding and funding for two new posts to allow the important work to continue and increase the team's capacity to support people in Angus
- Appointing a Senior Development Worker, this changed dynamics in the team a little and allowed us to streamline the referral process which means partners/referrers now have one point of contact at the start of the process.
- Taking actions on the recommendations following an external evaluation, this included focused work with the CASG.
- Awareness raising to organisations across Angus, attending events and meetings.
- Being out in the community raising awareness to both individuals and a wider section of the community.
- Using the learnings from Covid restrictions to provide more diverse options and streams for learning sessions. Members of the team have held several in person learning sessions with more planned throughout the year.
- Citizen Advocacy Steering Group meeting in person and looking at avenues to identify how they can use their lived experience to influence policy and procedure. Improving the communication between the team to build relationships in between meetings.
- Recruitment of two new colleagues, also the interim & handover support of Senior Development Worker whilst the new Development Manager role was recruited for and then filled.

Challenges:

- Team changes
- Rekindling a physical community presence and navigating the changes in the Third Sector as result of the impact of Covid.
- The individual impact on people that restrictions and reduced services.

Amazing Citizen Advocates!



Afternoon Tea
Spring 22



"Lovely to meet up as a group, not forgetting the afternoon tea & mocktails!"
Spring event feedback



Members of CASG

'Absolutely marvellous'
'Really, really, really good.'
'I enjoyed myself.'
Burns Bingo Feedback



Celebration Event
November 22



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 2023

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 2023

Contents	Page
Trustees' Annual Report	3 - 9
Independent Examiner's Report	10
Statement of Financial Activities	11
Balance Sheet	12
Notes to the Accounts	13 – 22

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2023

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 2023.

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: Fiona Arnot – Chair
Emma Crouch – Vice Chair
John Grant - Treasurer
Robin Ross
Derek Stewart
James Henderson from November 2022

Others who served during the period: Stephanie Wren until November 2022

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 2023

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

The Objects of AIA are the advancement of education, the advancement of human rights, conflict resolution or reconciliation, the relief of need by reason of age, ill health, disability, financial hardship or other disadvantage, in particular to:

1. provide advocacy support to local people.
2. support local people to understand and access their rights.
3. support local people to have their voice heard and taken into account.
4. support local people to access appropriate services.
5. raise awareness of the resource to help people be better informed about advocacy and their rights.
6. seek local people to become volunteers (Citizen Advocates).
7. seek local people who would want and benefit from advocacy support.
8. develop the advocacy resource based on identified gaps of advocacy provision (i.e horizon planning)
9. develop the advocacy resource based on the feedback/influence of people with lived experience

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2023

To achieve the above AIA provides independent advocacy to individuals living within Angus who have:

- a Mental Illness
- a Learning Disability
- an Acquired Brain Injury
- Dementia, or
- are an older person
- experiencing issues relating to substance use
- Children & Young People affected by the Childrens Hearings System (or issues to do with social work/education)

and who are facing barriers to:

- having their voice heard and safeguarding their own interests and rights

....and who have no one else who can freely support them.

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

Achievements & Performance

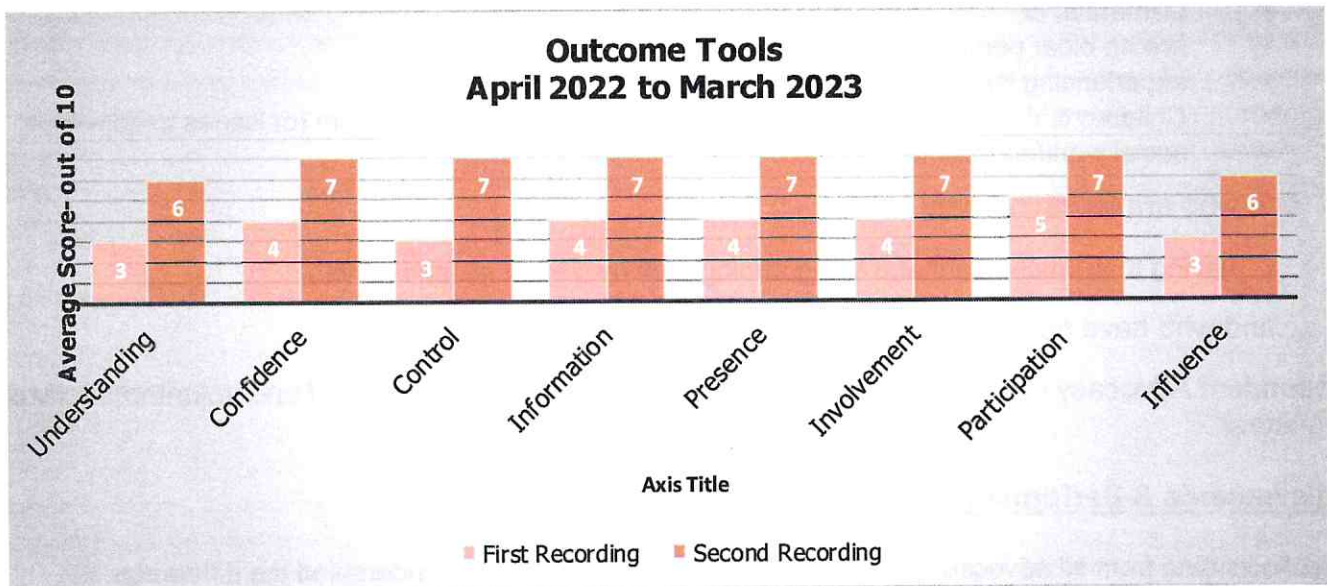
AIA collects data from all advocacy partnerships. We do this to help us to understand the difference independent advocacy support is making in people's lives. We are committed to understanding what is working well and what needs to change or improve for advocacy partners to ensure that accessing support is a positive experience. We work towards the following outcomes, which link in with national outcomes set out by the [Scottish Independent Advocacy Alliance Independent Advocacy](#).

Angus Independent Advocacy Outcomes		
Confidence <i>Advocacy supports people to grow in confidence</i>	Understanding <i>Advocacy increases people's understanding of their rights</i>	Control <i>Advocacy helps people gain control and agency over their own lives</i>
Influence <i>Advocacy supports people to have more influence in their own lives</i>	Participation <i>Advocacy encourages and supports the advocacy partner to participate in meetings.</i>	Presence <i>Advocacy supports people to have a valued presence in their local community</i>
Involvement <i>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.</i>	Information <i>Advocacy supports people to access information in an appropriate format</i>	

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2023

We have completed comparison outcome tools (beginning and end of partnership) for **59** direct advocacy (adult) partners during this period. Across all projects, we supported **640** people. This is an increase compared to 2021-2022 (in part due to additional temporary funding Jan -Dec 2022) and is higher than pre covid.



Much of our support for adults has continued to focus on statutory processes, with mental ill health remaining the main reason for individuals requiring advocacy. We continue to see individuals who are facing multiple and complex issues and being subject to multiple pieces of legislation. Our citizen advocacy project can support those who do not have specific issues at the point of referral, or who require longer term support (non-statutory), who meet our core criteria.

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

“I have done some things I have sorted out on my own. I would normally just panic about things”

“I managed to work alongside social work to get the outcome we all wanted”

“Meetings, they found laws to back me up and picked up on other things that i hadn’t noticed”

“More empowered to know my rights and share, even when that’s unpopular with my workers” “

“I have somewhere safe to live”

“I have my son back”

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2023

Partners noted improvements in the following:

<u>Outcome</u>	<u>% of partners reporting improvement</u>
Confidence	62.5%
Understanding of issues	100%
Access to information	100%
Feeling in control	75%
Influence over others	87.5%
Involvement in decision making	100%
Accessing support	87.5%
People in their life*	37.5% *

**Citizen Advocacy partnerships do not use this tool. The lower % compared to other outcomes may reflect the fact that much of the core adult work has focused on supporting individuals through statutory processes.*

100% of respondents said they would come back to AIA for support again.

What is working well?

Across all areas of work individuals continued to report positively in terms of outcomes. Overall, the feedback about advocacy is very positive; showing that this support is making a genuine difference in **people's lives and contributing to individual, organisational, and national outcomes**. Individuals noted that having **access to information, support to understand this, support to get their views across and having someone on their side** was of most value.

What do we need to change or improve?

The majority of partners tell us that they are/were happy with their advocacy support and had no suggestions for change. Some comments highlight the desire for **greater understanding about the role of advocacy, more support and earlier access** to support.

Suggested areas for improvement:

- Continuing to raise awareness within community/with multi agency professionals with a view to enabling earlier access to advocacy support.
- Continue to develop a variety of promotional materials across all areas.
- More accessible materials to aid understanding of the role of independent advocacy (for partners, carers, family, and professionals). For partners, we have further developed outcome tools to include an advocacy agreement and began using this for direct advocacy partnerships in April 2023

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2023

Overview of Key achievements/challenges

Details of specific project successes and challenges for the period can be viewed in AIA Annual Report 22-23. Across the organisation notable achievements and challenges relate to:

- **Board of Directors** – changes within the BoD have allowed for the recruitment of new members who bring with them different skills and experiences. The Board developed a new strategic plan for 2023-2026.
- **Organisational structure-** The AIA Board reviewed the staffing structure in late 2022/early 2023. Although we did not receive continuation funding for the Duty Worker post, despite a successful trial period, the Board decided it was necessary to retain this post to deal with referrals in a timely manner. We introduced a sessional post to ensure adequate direct advocacy support. We also created an additional administrative post via the Modern Apprenticeship scheme to support the increase in reporting/administration arising from expansion over the past few years.
- **Student placements-** we hosted two student placements over the period, following a break due to the pandemic. This has been a positive experience for all involved.
- **Citizen Advocacy-** AIA was awarded two years funding from the National Lottery Fund to continue and develop the Citizen Advocacy project from September 2022 to August 2024. While this has allowed us to continue this preventive element of AIA work, the team has faced challenges recruiting volunteers in the post- covid environment. The funding includes scope to explore how we can develop volunteering opportunities across the organisation, including one off and shorter term work.

Future Plans

As we enter 23/24, we intend to implement key elements of our strategic plan; particularly in relation to accessibility of materials, developing the workforce and identifying gaps in advocacy provision.

We will be looking to commission an external evaluation of our Citizen Advocacy project to inform project development beyond Autumn 2024. We plan to develop collective advocacy for individuals affected by substance use as well as exploring other opportunities for collective work via the Citizen Advocacy Project.

As demand for the CYP project continues to grow, we plan to consider how we can develop this project further to ensure a wider range of CYP can access support.

AIA will continue to be part of regional and national discussions about independent advocacy.

Trustees' Annual Report (incorporating the Directors' Report)

Year ended 31 March 2023

Financial Review

An increase in income to £453,079 (2022: £411,558) along with increased expenditure of £469,782 (2022: £432,314) resulted in a deficit for the year of £16,703 (2022: a deficit of £20,756). The deficit was funded from reserves brought forward at the start of the year so that at the 31 March 2023 the charity held total funds of £156,175 (2022: £172,874). These funds consisted of £87,339 (2022: £69,636) in the unrestricted fund, which can be spent at the discretion of the trustees and £68,836 (2022: £103,238) 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 2023 the general reserves held were £79,162 (2022: £65,568) and represent just over two month's running costs. This level of reserves is considered by the Trustees to be 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 26 September 2023 and signed on their behalf by:



.....
Fiona Arnot
Chair

Independent Examiner's Report

I report on the financial statements of Angus Independent Advocacy for the year ended 31 March 2023 which are set out on pages 11 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.

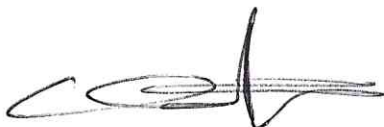
I have satisfied myself that the charity is not subject to audit under Regulation (10)(1)(a)-(c) of the 2006 Regulations or company law and is eligible for independent examination. I have therefore **examined your charity's accounts as required under** section (44)(1)(c) of the 2005 Act and Regulation 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: 12/10/23

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

Year ended 31 March 2023

	Note	Unrestricted Funds	Restricted Funds	2023 Total	2022 Total
		£	£	£	£
Income from:					
Donations	5	-	146,438	146,438	92,349
Charitable activities	6	254,551	51,324	305,875	319,190
Bank interest		766	-	766	19
Total income		255,317	197,762	453,079	411,558
Expenditure on:					
Charitable activities	7	241,649	228,133	469,782	432,314
Net income/(expenditure)		13,668	(30,371)	(16,703)	(20,756)
Transfers		4,031	(4,031)	-	-
Actuarial gains/(losses) on defined benefit pension schemes		4	-	4	820
Net movement in funds		17,703	(34,402)	(16,699)	(19,936)
Reconciliation of Funds					
Funds brought forward		69,636	103,238	172,874	192,810
Net movement in funds		17,703	(34,402)	(16,699)	(19,936)
Funds carried forward		87,339	68,836	156,175	172,874

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 13 to 22 form an integral part of these accounts.


Balance Sheet

At the 31 March 2023

	Note	Unrestricted Funds	Restricted Funds	2023 Total	2022 Total
		£	£	£	£
Fixed Assets					
Tangible assets	8	8,177	-	8,177	4,068
Current Assets					
Debtors	9	2,745	5,000	7,745	58,332
Prepayments	10	3,339	1,425	4,764	5,569
Cash at bank & in hand		106,577	86,974	193,551	171,759
Total current assets		<u>112,661</u>	<u>93,399</u>	<u>206,060</u>	<u>235,660</u>
Current Liabilities					
Deferred income	11	-	22,440	22,440	59,008
Creditors due within one year	12	32,942	1,843	34,785	6,931
Accruals	13	420	280	700	700
Total current liabilities		<u>33,362</u>	<u>24,563</u>	<u>57,925</u>	<u>66,639</u>
Net current assets		<u>79,299</u>	<u>68,836</u>	<u>148,135</u>	<u>169,021</u>
Total assets less current liabilities		<u>87,476</u>	<u>68,836</u>	<u>156,312</u>	<u>173,089</u>
Creditors: amounts due after one year		137	-	137	215
Net assets		<u>87,339</u>	<u>68,836</u>	<u>156,175</u>	<u>172,874</u>
Funds of the Charity					
Unrestricted funds		87,339	-	87,339	69,636
Restricted funds		-	68,836	68,836	103,238
Total Funds		<u>87,339</u>	<u>68,836</u>	<u>156,175</u>	<u>172,874</u>

The directors confirm that for the financial period ended 31 March 2023 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 10. 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 13 to 22 form an integral part of these accounts.

Approved by the Trustees on the 26 September 2023 and signed on their behalf by:

..... Fiona Arnot - Chair

Notes to the Financial Statements

Year ended 31 March 2023

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)

No changes have been made to the **basis of preparation** or to the **previous year's accounts**.

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.

Notes to the Financial Statements

Year ended 31 March 2023

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.

2.9. Financial Instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

3 Trustee remuneration, expenses and related party transactions

No remuneration was paid to Trustees during the year (2022 - nil). During the year £104 out of pocket expenses were paid to 2 Trustees (2022 -nil). There were no other related party transactions.

Notes to the Financial Statements

Year ended 31 March 2023

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	6,266	104,835	63,767	(963)	46,371
Families Project	1,677	20,000	21,258	(322)	97
Children’s Hearings Advocacy	8,034	61,603	61,442	(1,445)	6,750
Lived experience advocacy post	37,132	11,324	39,438	(1,527)	7,491
Senior Duty Manager	26,263	-	26,972	709	-
Lived experience test of change	23,866	-	15,256	(483)	8,127
Total	103,238	197,762	228,133	(4,031)	68,836

The transfers out of the restricted funds represent the value of equipment that, once purchased, satisfied the restriction and was transferred to the unrestricted fund. The £709 transferred into the Senior Duty Manager fund represents the unrestricted funds used to support this activity.

5. Donations

	2023 Total	2022 Total
	£	£
Donations	20	-
Scottish Government	61,603	39,308
The National Lottery	84,815	53,041
Total	146,438	92,349

Notes to the Financial Statements

Year ended 31 March 2023

6. Income from Charitable activities

	2023 Total	2022 Total
	£	£
Angus Council/NHS	292,991	310,195
University of Dundee	1,560	-
Angus Health & Social Care Partnership	11,324	8,995
Total	305,875	319,190

7. Expenditure on Charitable activities

	Note	2023 Total	2022 Total
		£	£
<u>Direct costs</u>			
Staff Costs	14	370,928	324,262
Travel		11,500	8,548
Volunteer expenses		844	1,498
Training		13,979	8,731
Printing, postage and stationery		1,648	2,840
Computer and equipment		7,589	6,199
Sub total		406,488	352,078
<u>Support costs</u>			
Rent, rates and insurance		15,291	16,569
Heat & Light		3,935	2,840
Repairs and renewals		5,330	9,446
Telephone & internet		7,473	7,423
Other expenses		2,459	14,139
Depreciation		2,047	1,980
Cleaning		483	822
Fees & subscriptions		11,063	5,489
Bank/finance charges		253	199
Accountancy	16	7,942	9,039
Recruitment costs		1,348	2,870
Events		1,536	6,921
Advertising		4,134	1,615
Management costs		-	884
Sub total		63,294	80,236
Total		469,782	432,314

Notes to the Financial Statements

Year ended 31 March 2023

8. Tangible Assets	Fixtures fittings & equipment		
	£		
Cost			
At 1 April 2022	34,459		
Additions	6,156		
At 31 March 2023	<u>40,615</u>		
Depreciation			
At 1 April 2022	30,391		
Charge for the year	2,047		
At 31 March 2023	<u>32,438</u>		
Net book value			
At 1 April 2023	8,177		
At 31 March 2022	4,068		
9. Debtors		2023 Total	2022 Total
		£	£
South East LIG		-	23,866
Angus Health & Social Care Partnership		5,000	23,334
Angus Council		370	8,757
Rent Deposit		2,375	2,375
Total		<u>7,745</u>	<u>58,332</u>
10. Prepayments		2023 Total	2022 Total
		£	£
Rent		1,900	1,900
Subscriptions		1,635	2,925
Insurance		955	744
Tel & internet		274	-
Total		<u>4,764</u>	<u>5,569</u>

Notes to the Financial Statements

Year ended 31 March 2023

11. Movement in Deferred Income	Balance 31/03/2022	Funds received	Released to income	Balance 31/03/2023
	£	£	£	£
Angus Council & NHS Funding for 2023/24	-	22,440	-	22,440
Angus Council & NHS Funding for 2022/23	43,400	-	43,400	-
Citizen Advocacy Project for 2022/23	15,608	-	15,608	-
	<u>59,008</u>	<u>22,440</u>	<u>59,008</u>	<u>22,440</u>

12. Creditors due within one year

	2023 Total	2022 Total
	£	£
HMRC	6,188	3,269
Trade creditors	29,114	3,589
Pension contributions	(517)	73
Total	<u>34,785</u>	<u>6,931</u>

13. Accruals

	2023 Total	2022 Total
	£	£
Independent Examiner	700	700
Total	<u>700</u>	<u>700</u>

14. Staff Costs

	2023 Total	2022 Total
	£	£
Salaries	320,983	281,308
Employers NI	23,405	19,626
Employers Pension	26,540	23,328
Total	<u>370,928</u>	<u>324,262</u>

No employee received remuneration of more than £60,000 (2022: None).
The average monthly number of employees during the year was 16 (2022:14).

Notes to the Financial Statements

Year ended 31 March 2023

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

	2023	2022
	Total	Total
	£	£
Independent Examination	350	350
Preparation of accounts	350	350
Other accountancy	7,242	8,339
Total	7,942	9,039

Notes to the Financial Statements

Year ended 31 March 2023

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 2022

	Unrestricted Funds	Restricted Funds
	£	£
Income from:		
Donations	-	92,349
Charitable activities	231,329	87,861
Bank interest	19	-
Total income	<u>231,348</u>	<u>180,210</u>
Expenditure on:		
Charitable activities	244,625	187,689
Net income/(expenditure)	<u>(13,277)</u>	<u>(7,479)</u>
Transfers	935	(935)
Actuarial gains/(losses) on defined benefit pension schemes	820	-
Net movement in funds	<u>(11,522)</u>	<u>(8,414)</u>
Reconciliation of Funds		
Funds brought forward	81,158	111,652
Net movement in funds	<u>(11,522)</u>	<u>(8,414)</u>
Funds carried forward	<u><u>69,636</u></u>	<u><u>103,238</u></u>

Notes to the Financial Statements

Year ended 31 March 2023

17.2 Balance Sheet at 31 March 2022

	Unrestricted Funds	Restricted Funds
	£	£
Fixed assets		
Tangible assets	4,068	-
Current Assets		
Debtors	2,375	55,957
Prepayments	3,007	2,562
Cash at bank & in hand	106,915	64,844
Total current assets	<u>112,297</u>	<u>123,363</u>
Current Liabilities		
Deferred income	43,400	15,608
Creditors due within one year	2,736	4,195
Accruals	378	322
Total current liabilities	<u>46,514</u>	<u>20,125</u>
Net current assets	<u>65,783</u>	<u>103,238</u>
Total assets less current liabilities	<u>69,851</u>	<u>103,238</u>
Creditors: amounts due after one year	215	-
Net assets	<u>69,636</u>	<u>103,238</u>
Funds of the Charity		
Unrestricted funds	69,636	-
Restricted funds	-	103,238
Total Funds	<u>69,636</u>	<u>103,238</u>

17.3 Restricted funds for 2021/22

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	<u>111,652</u>	<u>180,210</u>	<u>187,689</u>	<u>(935)</u>	<u>103,238</u>

Notes to the Financial Statements

Year ended 31 March 2023

17.4 Movement in Deferred Income for 2021/22	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>