



Taking Part

An Independent Service
for People with Health & Social Care Needs

Louise House, Roman Road,
Meole Brace, Shrewsbury, Shropshire SY3 9JN

Telephone: 01743 363399

takingpart@takingpart.co.uk

Changing Times, Changing Lives

January 2026

Taking Part had a busy year from April 2024 to March 2025. Contracts came up for renewal and retendering was a lot of hard work. By working with our collaborative partners, we were successful in having our service recommissioned in Shropshire, which was wonderful news. In November Taking Part celebrated our 30 year anniversary. We combined this milestone event with our AGM and invited clients, colleagues and friends to join us celebrate this achievement.

During this financial year of 2024/2025, Taking Part has seen a reduction in funding as there has been no contribution to our work from the NHS which is very disappointing. However, we do remain a preferred supplier in Shropshire, Telford and Wrekin to provide parental advocacy to clients who have substantial difficulties in understanding statutory services where their are under child protection or are children in need

Taking Part continues to support a high number of clients with advocacy, information and guidance. The issues clients need support with are becoming harder and more complex taking much longer time to resolve. The staff team at Taking Part remain dedicated to the organisation and the people they support. Resilience and hard work is reflected in the outcomes achieved by Taking Part.

In Shropshire, our Advice, Advocacy and Welfare Benefits partnership supported 503 people with advocacy with 5562 interventions. Our volunteer advocates provided 1700 hours of the time for free which equates to £22,950.

Advocacy

Information

Advice

Guidance

In Telford, our Wellbeing Independence Partnership took 1440 calls at First Point of Contact and supported a further 334 clients with follow up and more intense work.

In December 2024, Taking Part successfully recruited a new trustee to our board. Dick brings a new perspective to Taking Part with his military background and involvement with other charities. He is a welcome member and has provided good insights and suggestions to the team and organisations.

In March 2025 a long service member of staff retired. Upon her retirement, Diana also celebrated 20 years service with Taking Part. Her dedication and commitment to Taking Part has been outstanding. We celebrated her retirement with a team event to say thank you and farewell.

During 2024/2025 we have seen a reduction in the number of volunteer citizen advocates. Some volunteers have also retired whilst others have taken on caring roles or new opportunities. This is being reflected throughout the voluntary sector so Taking Part are not alone with this trend.

Our county is facing severe financial challenges and this is impacting services. Both the local authority and ICB are having to make huge savings in their budgets. There is much focus on preventative services, supporting people to 'self help' and seek alternative solutions to their issues rather than turning to statutory services. Taking Part, along with other voluntary sector colleagues, work closely with statutory services to help them understand how we can be of assistance during this difficult time.

Despite having reduced funding during this financial year, we remain financially secure for the time being. I would like to give a special thank you to Julie Mellor, our C.E.O. Her tireless efforts to secure funding and her ongoing support for the staff, volunteers and trustees enables the organisation to continue providing this essential service.

Taking Part team remain dedicated and loyal and optimistic about the future.

Our Taking Part team consists of:

Volunteer Board of Trustees

- Jean Harris (chair)
- Garry Kirlew
- Richard (Dick) Barton

Staff Team

- 1 part time C.E.O
- Five part time contracted staff – 3 Shropshire based, 2 Telford based
- Four sessional workers.
- Ten Experts by experience.
- Twenty Five volunteer citizen advocates.
- Two professional advisors.

Finances for the year 2024/25

Funding from local authorities, local grants, private funded commissions and other projects are reported on a quarterly basis. Our monitoring and reporting mechanism reflect outputs, outcomes and funding spend.

We hold reserves to cover running costs for 18mths in compliance with our reserves policy. We also continue to hold ring fenced redundancy funds for staff and liable costs in the event of charity closure.

Accounts available on Charity Commission website.

Independently examined by;

Phillips Ltd. Chartered Accountants

4 Pearson Road, Central Park

Telford, Shropshire TF2 9TX



Jean Harris

Chair of Trustees

Taking Part

Registered Charity number 1092033
Company Limited by guarantee number 04362948

Unaudited Income and Expenditure Account for the Year Ended 31 March 2025

Offices
Taking Part
Louise House
Roman Road
Meole Brace
Shrewsbury
Shropshire
SY3 9JN

Accountants

Phillips Ltd
Chartered Accountants
4 Pearson Road
Central Park
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TF2 9TX

Taking Part
Company No 04362948
Charity No 1092033
Contents of the Financial Statements

for the period 1st April 2024 to 31 March 2025

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Taking Part

Report of the Directors for the period 1st April 2024 to 31st March 2025

The Directors present their report with the financial statements of the company for the period 1st April 2024 to 31st March 2025.

Principal Activity

The principal activity of the company in the period under review was that of the prevention or relief of poverty and provision of information, advice, advocacy and training for those clients who have health and social care needs.

Directors

The directors who have held office during the period from 1st April 2024 to the date of this report are as follows:

Mr Garry S Kirlaw

Mrs Jean Harris

Mr Paul Barton (appointed 22nd November 2024)

Mr Paul R Hume-Miller was a director until his resignation on 23rd May 2024

All the directors who are eligible offer themselves for election at the forthcoming Annual General Meeting.

This report has been prepared in accordance with the special provisions of part 15 of the Companies Act 2006 relating to small companies.

ON BEHALF OF THE BOARD


Mrs Jean Harris

Date 16.12.25

Independent Examiner's Report on the Accounts to the trustees of Taking part
On the Accounts for the period 1st April 2024 to 31st March 2025

Independent examiner's report to the trustees of Taking Part

I report to the trustees on my examination of the accounts of Taking Part for the year ended 31 March 2025

Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by Section 130 of the act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and contents of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Neil Phillips FCA
Phillips Ltd
Chartered Accountants
4 Pearson Road
Central Park
Telford
TF2 9TX



Date

17/12/25

Taking PartStatement of Financial Activities for the period 1st April 2024 to 31 March 2025

	Note	Unrestricted funds £	Restricted funds £	2025 £	2024 £
Incoming resources from charitable activities					
Grants and contracts	2	244,690	2,276	246,966	249,555
Total incoming resources		<u>244,690</u>	<u>2,276</u>	<u>246,966</u>	<u>249,555</u>
Resources expended					
Charitable activities		260,972	-	260,972	252,770
Total resources expended	3	<u>260,972</u>	<u>-</u>	<u>260,972</u>	<u>252,770</u>
Net (outgoing)/incoming resources		<u>(16,282)</u>	<u>2,276</u>	<u>(14,006)</u>	<u>(3,215)</u>

Taking Part
Balance Sheet as at 31 March 2025

	Note	Unrestricted funds £	Restricted funds £	2025 £	2024 £
Current assets					
Debtors	4	30,464	-	30,464	68,263
Cash at bank and in hand		143,689	155,690	299,379	274,611
Total current assets		174,153	155,690	329,843	342,874
Creditors					
	5	3,847	-	3,847	2,872
Net current assets		170,306	155,690	325,996	340,002
Net assets		170,306	155,690	325,996	340,002
Funds of the Charity					
		Unrestricted funds £	Restricted funds £	2025 £	2025 £
Opening Funds		186,588	153,414	340,002	343,217
Net (outgoing)/ incoming resources		(16,282)	2,276	(14,006)	(3,215)
Total funds		170,306	155,690	325,996	340,002

For the year ended 31st March 2025 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies.

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 Companies Act 2006.

The directors acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies regime and in accordance with FRS102 SORP.

The financial statements were approved by the Board of Directors on16/12/25
and were signed on its behalf by:

.....
J Harris

Mrs Jean Harris

Taking Part

Notes to the financial statements for the period 1st April 2024 to 31 March 2025

1 Accounting policies

Basis of preparation

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note(s) to these accounts. The accounts have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 and with the Charities Act 2011.

Incoming resources

All incoming resources are included on the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy.

Resources expended

Expenditure is recognised on an accruals basis as a liability is incurred.

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them.

2 Incoming resources from charitable activities

	2025	2024
	£	£
Grants	7,528	10,724
Other Income	239,438	238,831
	<u>246,966</u>	<u>249,555</u>

3 Total resources expended

	Charitable Activities 2025	Charitable Activities 2024
	£	£
Wages	213,865	205,317
Expenses	15,098	13,938
Telephone	1,698	2,157
Postage & Stationery	5,173	3,829
Computer Expenses	7,813	8,261
Staff training	1,636	4,913
Sundry expenses	4,975	1,996
Accountancy and professional charges	790	720
Travelling	4,945	7,051
Rent and premises costs	2,756	2,524
Insurance	2,121	1,972
Bank Charges	102	94
	<u>260,972</u>	<u>252,770</u>

Taking part

Notes to the Financial Statements for the period 1st April 2024 to 31 March 2025

4 Debtors: amounts falling due within one year

	2025	2024
	£	£
Trade Debtors	30,464	68,263
	<u>30,464</u>	<u>68,263</u>

5 Creditors: amounts falling due within one year

	2025	2024
	£	£
Other creditors and accruals	3,847	2,872
	<u>3,847</u>	<u>2,872</u>

6 Taxation status

The company is a registered charity and, under sections 478 and 479 of the Corporation Tax Act 2010 is exempt from corporation tax on its charitable activities.

7 Reserves policy

General funds are unrestricted funds which are available for the use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designation for other purposes.

Designated funds comprise restricted funds that have been set aside by Trustees for particular purposes.

Reserves will be used to continue with the running of the service until other funds are obtained in the case of future lost income from statutory sources.

Funds in reserves will have to take into consideration payments required for staff redundancies and expenditure associated with the closure of the service if further funding is not forthcoming in the future. This expenditure will all be overseen by the board of Trustees.

The charity is a company limited by guarantee and has no share capital. In the event of the charity being wound up, the liability in respect of the guarantee is limited.

Taking Part

Registered Charity number 1092033
Company Limited by guarantee number 04362948

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