

ACTIVE INDEPENDENCE

England & Wales · Charity number 1148975

Details

Status Registered

Legal form Charitable company

Company number [07940239](#)

Registered 2012-09-17

Register [View on the Charity Commission register](#)

Contact

Address Active Independence
PO Box 1626
Doncaster
South Yorkshire
DN1 9WX

Phone 07917607730

Email info@activeindependence.org

Website www.activeindependence.org

Activities

Objects: TO MEET THE NEEDS OF DISABLED PEOPLE WITH A VIEW TO HELPING THEM INTEGRATE AND PARTICIPATE MORE FULLY IN THEIR SOCIETY BY PROVIDING INFORMATION, GUIDANCE, ADVICE, TRAINING, ADVOCACY AND OTHER SUPPORT TO THEM, THEIR FAMILIES, CARERS AND PERSONAL ASSISTANTS AT THE TRUSTEES DISCRETION

Activities: To provide information, advice, advocacy, training and support to enable Disabled people to have choice and control to live independent lives To raise aspirations and confidence amongst Disabled people, families and carers to facilitate choice, control and independent living To campaign for the right for Disabled people to have choice and control in order to live independently and with dignity

Classification

- **How:** Provides Services, Provides Advocacy/advice/information, Other Charitable Activities
- **What:** General Charitable Purposes, Education/training, The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** Elderly/old People, People With Disabilities, The General Public/mankind

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£155,579	£144,665	-	-
2024-03-31	£118,584	£122,282	-	-
2023-03-31	£111,196	£105,529	-	-
2022-03-31	£84,885	£73,875	-	-
2021-03-31	£84,565	£60,828	-	-

Trustees

Name	Role	Appointed
Naveen Judah	Chair	2018-03-21
Brian Nelson		2021-01-21
David Turner Smith		2016-11-16

ACTIVE INDEPENDENCE

England & Wales - Charity number 1148975

Accounts

Active Independence



2024-2025 .

ANNUAL REPORT

Published September, 2025

Welcome to our Annual Report which summarises our activities from April 2024 to March 2025

Over this year Disabled people continued to face challenges with rising costs and difficulties recruiting PAs. Consequently demand on our Advocacy service steadily increased so we took the decision to bring Maria Levick onto our permanent Advocacy team. The year ended on a sad note when Jo Ritson, one of our founder members and Advocacy manager, retired. We will all greatly miss her incredible knowledge and expertise. We also welcomed Jacqui onto the staff team as our Groups Development Officer. Our wellbeing groups continue to thrive so much so we began a new group in Rotherham, Our PA Support service also continued to provide much needed information and support to the PA workforce. The details of our activities are in the report, including many fabulous photos from our trips and activities.

We would like to thank our funders who enable us to continue to deliver such high quality services.

- Voluntary Action Rotherham
- Crossroads Care
- Kings Fund
- Lloyds Foundation Trust
- Tesco
- HBJ Trust
- Brelms Trust
- Yorkshire Bank
- Scurrah Wainwright
- Mary Hearnshaw
- Freshgate Trust
- Doncaster VCFS
- Doncaster Community Fund
- City of Doncaster Council
- Postcode Lottery
- SYCF
- Sport England
- Sir George Earle Benevolent Fund
- Harry Bottom
- Barchester Charitable Foundation
- Awards for All
- Garfiel Foundation
- Skybet
- Sponsors from SkyDrive



THANK YOU DO MUCH FOR
BEING ONE OF OUR PARTNERS,
WE SIMPLY COULD NOT
DELIVER ON THIS CONTRACT
WITH YOU!

Overview

We have 3 broad aims which underpin all the work that we do:

- To provide information, advice, advocacy, training and support to enable Disabled people to have choice and control, and to live independent lives.
- To raise Aspirations and confidence amongst Disabled people, families and carers to facilitate choice, control and independent living
- To campaign for the right for Disabled people to have choice and control, in order to live independently and with dignity.

In pursuit of our aims, we engage in a variety of activities, which can be summarised under the following categories:

● Projects and Services

● Training

● Campaigns

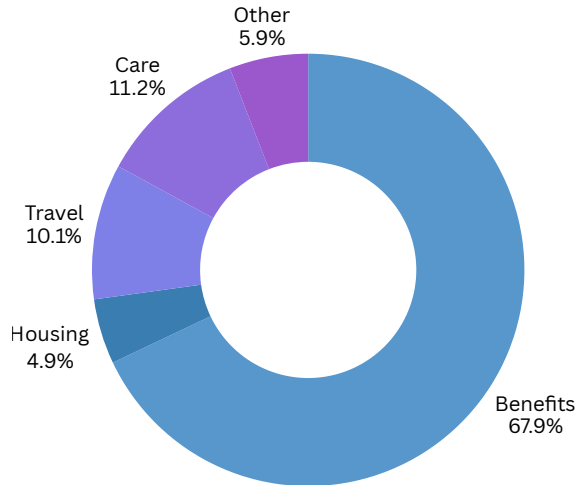
● Events / Promotion



ALL EXCELLENT, EVERYONE IS
SO WELCOMING AND SESSIONS
EASY AND RELAXED. VERY
INCLUSIVE, THANK YOU!

Advocacy Service

Issues Breakdown



Clients Supported

710 clients

Issues Helped With

753 different issues

Benefits Gained

£1,441,505

We are a team of highly experienced specialist advocates, trained in the Social Model of Disability and in disability benefit entitlements. During this period we continued to see increase in clients from Doncaster and **79%** of clients are now from outside of our Social Prescribing Contract. We continued to support clients from Crossroads Care Carers Resilience Service and employed another part-time advocate, Maria.

Case Study

SPS contacted us to assist Peter, who has learning disability and a long-term condition. He wanted to move back to his old neighbourhood. He had been relocated previously due to financial exploitation and being 'cuckooed' but he now faced threats and anti-social behaviour in his current home.

Our Advocate secured an upgrade to Peter's housing status from Band 4 to Band 2 due to his medical needs, working with the Housing Officer to ensure awareness of Peter's needs. Our advocate also found that although he had savings, he was only getting an allowance of £150 per week for all expenses from Citizenship First, who were managing his money for him. Following negotiation, this was increased to £250, enabling Peter to afford taxis and visit friends, which improved his wellbeing. We also helped Peter to apply for Pension Credit.

Outcomes:

- Improved Finances **Total: £58.65 per week and access to increased weekly allowance**
- Improved Wellbeing - can now afford taxis and visit friends
- Collaborated with relevant agencies to ensure his needs and concerns were addressed.

THANK YOU FOR
BEING MY GUIDING
LIGHT THROUGHOUT THIS PIP
PROCESS - YOU ARE AN
ABSOLUTE STAR!

Art of Wellbeing Project

This year, we welcomed **165 participants across 92 sessions**, leading to a total attendance of 892 across all activities. We launched a new group "Crafting Together - Upcycling for Good" in March 2025 and rebranded all our groups. We promote these on our active **Facebook** page and in our **monthly Ebulletin**, along with information on a range of disability-related issues.

Creative Textiles - Edward Dunn, Maltby

This group now runs every Tuesday with the help of two new volunteers: Dawn and Jackie. The group has made an amazing **186 quilts** to children's and baby wards in the area.

Artful Balance - Edentrough, Doncaster

This group moved to a new venue, but has continued with its crafts, inclusive yoga, day trips to Cleethorpes & York; archery sessions and a number of barge trips.

Inclusive Cycling - Doncaster Cycling Hub

This weekly group remains popular, with high turn-out, no matter what the weather conditions, from March to November.

Crafting Together - Brecks, Rotherham

This new group focuses on recycling and creating new crafts. They meet twice a month on 1st, 3rd Wednesdays.



THANK YOU AGAIN, TO ALL YOU
LADIES, FOR YOUR KINDNESS,
HARD WORK AND GENEROSITY

PA Support Service & PA Register

PA Peer Support

We have a dedicated PA Support Officer, who provides confidential 1-1 information, advice and mentoring support to PAs in Doncaster and Rotherham. She supported **109 PAs** with total of **160 issues**.

PA Register

We have an established on-line PA Register, which is free for PAs to join. It provides a platform for individual employers to advertise for jobs, for a small fee, and it allows PAs to upload their details and apply for available positions. 39 Adverts were placed by employers on our PA Register, 17 of these we know where filled by a PA if we managed their recruitment from 67 PA applications we received.

Other PA Services

As well as supporting PAs via telephone and What's App, we produce a monthly PA e-bulletin that has a 124 subscribers and a dedicated PA Facebook page with 567 followers. We also provided 26 ID Badges. and have comprehensive free on-line training modules for both PAs and Individual Employers.



YOU'VE BEEN BRILLIANT, JUST THE PERSON I'VE BEEN LOOKING FOR, THANK YOU SO MUCH FOR YOUR ADVICE - YOU HAVE BEEN HELP THEN ANYONE SPOKEN TO!

Campaigns

Throughout this year, we have maintained our campaign efforts to assist Personal Assistants (PAs) in obtaining the Blue Light Discount Card.

Additionally, we have engaged with the Doncaster Advice Network, which continues to raise awareness about the impact of the Cost of Living on Disabled People and promote Pension Credit.

We are members of Disability Rights UK and continue to promote the rights of Disabled people throughout our work.

Training

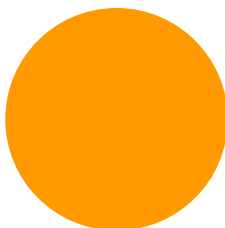
We continue to actively promote our online training programme designed for personal assistants and their employers. We attended several Skills for Care events.

Governance

This year has brought significant changes to our staffing. We have:

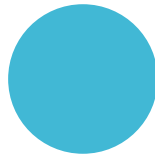
- Employed Maria Levick (30 hour) as Advocate and Groups Development, supporting the Rotherham Art of Wellbeing groups.
- Employed Jacqui Clayton (8 hours) as Groups Development Officer supporting the Doncaster Art of Wellbeing groups and organising day-trips.
- Added 5 hours to Angela Burnams contract to support clients with Attendance Allowance applications alongside running the PA Support service.
- Formalised the roles of 4 of our Groups Volunteers

Our Trustees continue to meet regularly. Work has focused on reviewing policies and refining our financial monitoring and develop a more robust funding strategy.

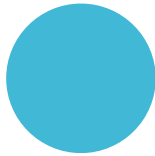


WE ARE OVERJOYED.
MY PIP DECISION WAS
OVERTURNED AT TRIBUNAL, I
BEEN AWARDED ENHANCED RATE
DL AND MOBILITY WITH £10,000
BACKPAY! THANK YOU FOR
SUPPORTING ME

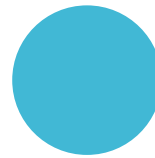
Trustees



Naveen Judah
Chair

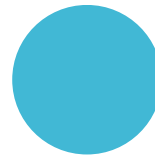


Brian Nelson
Trustee

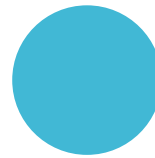


ACTIVE INDEPENDENCE

David Turner-Smith
Treasurer

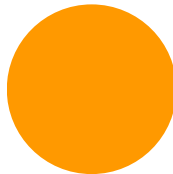


Eleanor Dabell
Trustee

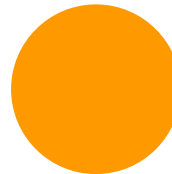


Jacqui Clayton
Trustee - retired
Sept 24

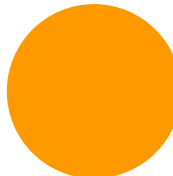
Staff



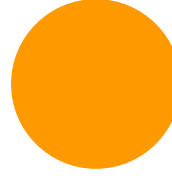
Barbara Booton
Chief Executive



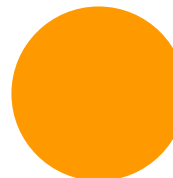
Fiona Martin
Operations Manager



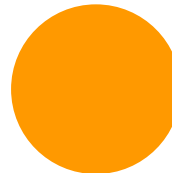
Jo Ritson
Advocacy Manager
(Retired Feb. 25)



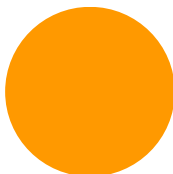
John Ward
Senior Advocate



Angela Burman
PA Support Officer /
Advocate



Maria Levick
Advocate & Group Dev
Officer



Jacqui Clayton
Group Dev Officer

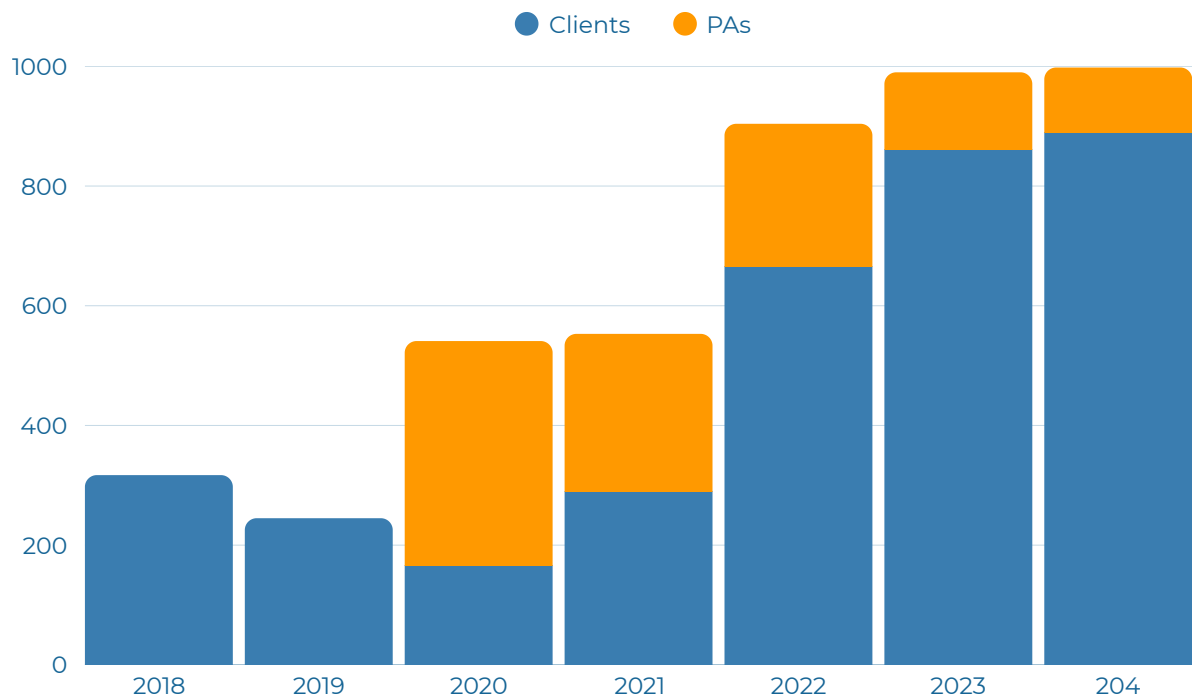
Huge thanks to our **volunteers** who make such a difference to the work we do:

- Abby Martin
- Emma Masterman
- Chris Martin
- Ellen Royston
- Dawn
- Jackie Matthews
- Julie Reed
- Liz Trimble
- Sue Cassey

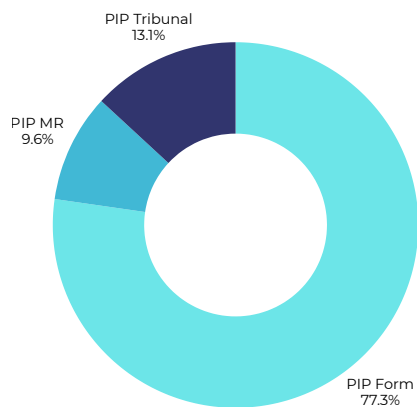


NO MORE WORRIES ABOUT
MONEY, JUST FOCUS ON GETTING
BETTER. ALL DOWN TO MY
ADVOCATE, I CAN'T THANK YOU
ENOUGH, YOUR HELP IS MUCH
APPRECIATED.!

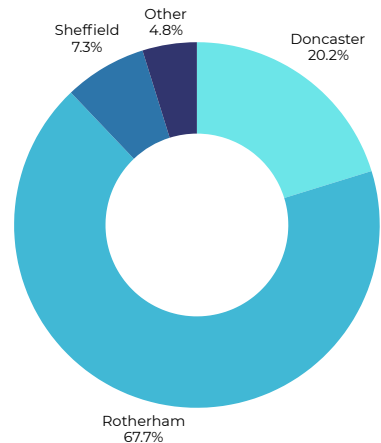
Highlights



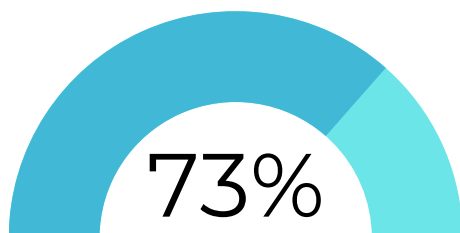
Assistance with PIP



Geographical Analysis (Advocacy)



% Female Members (AOW)



Benefits Gained = £1,441,505



THANK YOU FOR BEING MY
GUIDING LIGHT THROUGHOUT
THIS PIP PROCESS - YOU ARE AN
ABSOLUTE STAR

Looking Forward

Growth

Continue to develop our Art of Wellbeing offer. Consulting with members on increasing the number of sessions per month.
Review the capacity of the Advocacy team following Jo's retirement

Development

Begin to build our team of volunteers and build more comprehensive support and training for them
Ensure our policies are up to date and relevant.

Sustainability

Commit to ensuring our impact on our environment is minimised whilst working towards a more secure funding base. We will also look to recruit additional trustees

Closing Comments

Active Independence is proud to be 100% led by people with lived experience of the challenges and barriers faced by Disabled people, their families and PAs/carers. This includes all of our trustees, staff and volunteers. This means that all of our services and ways of working are developed and delivered to maximise inclusion and engagement and allow individuals to work and be involved in the ways that meet their needs.

Having such a value base is vital to our success. We believe that by being an exemplary model of inclusive ways of working promotes more positive attitudes towards Disabled people, challenges stereotypes and works to reduce barriers to Independent Living.

As we move forward it is important to us that we do not compromise on these values and principles. They will anchor and inform everything from our funding strategy to recruitment to work with our clients.

Barbara Booton
CEO



I FIND THE SERVICE & SUPPORT THAT YOU OFFER EXCEPTIONAL & HAVE HAD NOTHING BUT FANTASTIC COMMENTS FROM PATIENTS & FAMILIES THAT I HAVE REFERRED THEY ALWAYS GONE OVER & ABOVE..

Active Independence

Make Choices. Take Control.

Helping you lead an independent life



www.activeindependence.org
[@activeindependence](https://twitter.com/activeindependence)

PO Box 1626, Doncaster DN1 9WX

07917 607730

Charity Registration: 1148975

Company Registration: 07942030

Registered Company Address: The Old Barn, Anchorage Lane,
Sprotbrough. Doncaster. DN5 8DT



Company registration number: 07942039

Charity registration number: 1148975

Active Independence

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 March 2025

Campbell & Stenton Accountancy
The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

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Balance Sheet	4
Notes to the financial statements	5 to 9

The following pages do not form part of the statutory financial statements:

Statement of financial activities per fund	10 to 11
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Active Independence
Reference and Administrative Details

Charity name	Active Independence
Charity registration number	1148975
Company registration number	7942039
Registered office	The Old Barn, Anchorage Lane Sprotbrough Doncaster DN5 8DT
Secretary	Barbara Booton (Appointed 19 October 2016)
Trustees	David Alan Turner-Smith (Appointed 14 March 2017) Naveen Judah (Appointed 21 March 2018) Eleanor Alice Dabell (Resigned 3 September 2025) Jacqueline Clayton (Resigned 1 October 2024) Elizabeth Ann Jeffrey (Resigned 26 March 2025) Brian Nelson (Appointed 21 January 2021) Matthew Lester (Appointed 1 August 2025)
Accountant	Campbell & Stenton Accountancy The Old Barn Anchorage Lane Sprotbrough Doncaster DN5 8DT

Independent Examiner's Report to the Trustees of

Active Independence

I report on the accounts of the company for the year ended 31 March 2025, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

8 December 2025

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Statement of Financial Activities (including Income and Expenditure Account) for the Year Ended 31 March 2025

		Unrestricted Funds	Restricted Funds	Total Funds Year ended 31 March 2025	Total Funds Period ended 31 March 2024
	Note	£	£	£	£
Incoming resources					
Incoming resources from generated funds					
Voluntary Income	2	49,183	24,216	73,399	49,117
Other incoming resources	4	305	81,875	82,180	69,467
Total incoming resources		<u>49,488</u>	<u>106,091</u>	<u>155,579</u>	<u>118,584</u>
Resources expended					
Costs of generating funds					
Costs of generating voluntary income	5	-	-	-	-
Charitable activities - service delivery	5	30,340	114,325	144,665	122,282
Total resources expended		<u>30,340</u>	<u>114,325</u>	<u>144,665</u>	<u>122,282</u>
Net movements in funds		19,148	(8,234)	10,914	(3,698)
Reconciliation of funds					
Total funds brought forward		3,330	76,461	79,791	83,537
Total funds carried forward		<u>22,478</u>	<u>68,227</u>	<u>90,705</u>	<u>79,839</u>

All incoming resources and resources expended derive from continuing activities

Active Independence (Registration number: 07942039)

Balance Sheet as at 31 March 2025

		31 March 2025		31 March 2024	
	Note	£	£	£	£
Fixed Assets					
Tangible assets	9		541		541
Current assets					
Cash at bank and in hand		79,110		71,237	
Debtors		<u>796</u>		<u>701</u>	
		79,906		71,938	
Creditors: Amounts falling due within one year	10	<u>2,542</u>		<u>(2,754)</u>	
Net current assets			82,448		69,184
Net assets			<u>82,989</u>		<u>69,725</u>
The funds of the charity:					
Resticted funds			68,227		76,509
Unrestricted funds					
Unrestricted income funds			22,478		3,330
Total charity funds			<u>90,705</u>		<u>79,839</u>

For the financial year ended 31 March 2025, the charity was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the charity to obtain an audit of its accounts for the period in question in accordance with section 476.

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

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

Approved by the Board on 8 December 2025 and signed on its behalf by:

.....

Naveen Judah

Director

The notes on pages 5 to 9 form an integral part of these financial statements.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2025

1 Accounting policies

Basis of preparation

The financial statements have been prepared under the historical cost convention and in accordance with the Statement of Recommended Practice 'Accounting and Reporting by Charities (SORP 2005)', issued in March 2005, applicable accounting standards and the Companies Act 2006. The financial statements have been prepared on a cash basis.

Fund accounting policy

Unrestricted income funds are general funds that are available for use at the trustees' discretion in furtherance of the objectives of the charity.

Restricted funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Further details of each fund are disclosed in note 13.

Incoming resources

Voluntary income including donations and grants that provide core funding or are of a general nature is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Resources expended

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

Costs of generating funds comprise the costs associated with attracting voluntary income and the costs of trading for fundraising purposes.

Fixed assets

Individual fixed assets costing £0 or more are initially recorded at cost.

Depreciation

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Office equipment	33% reducing balance
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Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2025

2 Voluntary income

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2025 £	Total Funds Period ended 31 March 2024 £
Donations and Legacies				
Donations	2,430	-	2,430	1,187
Grants				
Grants	46,753	24,216	70,969	47,930
	49,183	24,216	73,399	49,117

3 Grants receivable

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2025 £	Total Funds Period ended 31 March 2024 £
Grants	46,753	24,216	70,969	47,930

4 Other incoming resources

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2025 £	Total Funds Period ended 31 March 2024 £
Other income				
Managed services Income	52	81,875	81,927	69,467
Other income	253	0	253	0
	305	81,875	82,180	69,467

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2025

5 Total resources expended

	Grants	Operating activity	Total
	£	£	£
Direct Costs			
Other direct costs		8,915	8,915
Employment costs	-	119,664	119,664
Establishment costs	-	2,686	2,686
Insurance	-	196	196
Advertising	-	0	0
Printing, posting and stationary	-	3,439	3,439
Subscriptions and donations	-	905	905
Sundry and other costs	-	323	323
Accountancy fees	-	1,639	1,639
Travel & Accommodation		5,660	5,660
Bank charges & interest		77	77
Depreciation of tangible fixed assets	-	1,161	1,161
	<u>0</u>	<u>144,665</u>	<u>144,665</u>

6 Trustees' remuneration and expenses

Trustees receiving remuneration during the period
Jacqueline Clayton (Resigned 1 October 2024)

7 Net (Expenditure)/income

Net (Expenditure)/income is stated after charging

	Year ended 31 March 2025 £	Period ended 31 March 2024 £
Depreciation of owned assets	<u>1,161</u>	<u>267</u>

8 Taxation

The company is a registered charity and is, therefore, exempt from taxation

Active Independence

Notes to the Financial Statement for the Year Ended 31 March 2025

9 Tangible fixed assets

	Fixtures, fittings and equipment £
Cost	
As at 1 April 2024	3473
Additions	3,689
At 31 March 2025	<u>7162</u>
Depreciation	
As at 1 April 2024	2932
Charge for the period	1161
As at 31 March 2025	<u>4093</u>
Net book value	
As at 31 March 2025	<u>3069</u>
As at 31 March 2024	<u>541</u>

10 Creditors: Amounts falling due within one year

	31 March 2025 £	31 March 2024 £
Trade Creditors	318	
Other creditors	1422	
Accruals and deferred income	872	774
Total Creditors	<u>2612</u>	<u>774</u>

11 Members' liability

The charity is a private company limited by guarantee and consequently does not have share capital. Each of the members is liable to contribute an amount not exceeding £nil towards the assets of the charity in the event of liquidation.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2025

12 Related parties

Controlling entity

The charity is controlled by the trustees who are all directors of the company

13 Analysis of funds

	At 1 April 2024	Incoming resources	Resources expended	At 31 March 2025
	£	£	£	£
General Funds				
Unrestricted income fund	3,330	49,488	30,340	22,478
Restricted Funds				
Restricted income fund	76,509	106,091	114,325	68,275
	79,839	155,579	144,665	90,753

14 Net assets by fund

	Unrestricted Funds	Restricted Funds	Total Funds 31 March 2025	Total Funds 31 March 2024
	£	£	£	£
Tangible assets	541	-	541	541
Current assets	22,478	68,227	90,705	79,839
Creditors: Amounts falling due within one year	2,542	-	2,542	(2,754)
Net assets	25,561	68,227	93,788	77,626

Active Independence

Statement of financial activities by fund Year Ended 31 March 2025

	Unrestricted income fund 2025	Unrestricted income fund 2024
	£	£
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	49,183	1,447
Other incoming resources	305	1,047
Total incoming resources	<u>49,488</u>	<u>2,494</u>
Resources expended		
Costs of generating funds		
Charitable activities - service delivery	<u>30,340</u>	<u>26,240</u>
Total resources expended	<u>30,340</u>	<u>26,240</u>
Net movements in funds	19,148	(23,746)
Reconciliation of funds		
Total funds brought forward	<u>3,330</u>	<u>27,076</u>
Total funds carried forward	<u><u>22,478</u></u>	<u><u>3,330</u></u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2025

..... continued

	Restricted income fund 2025	Restricted income fund 2024
	£	£
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	24,216	47,670
Other incoming resources	81,875	68,420
Total incoming resources	<u>106,091</u>	<u>116,090</u>
Resources expended		
Costs of generating funds		
Costs of generating voluntary income	-	-
Charitable activities - service delivery	114,325	96,042
Total resources expended	<u>114,325</u>	<u>96,042</u>
Net movements in funds	(8,234)	20,048
Reconciliation of funds		
Total funds brought forward	<u>76,461</u>	<u>56,461</u>
Total funds carried forward	<u><u>68,227</u></u>	<u><u>76,509</u></u>

This page does not form part of the statutory financial statements.

Independent Examiner's Report to the Trustees of Active Independence

I report on the accounts of the company for the year ended 31 March 2025, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

8 December 2025

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

ACTIVE INDEPENDENCE

England & Wales - Charity number 1148975

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 1	Month April	Year 2020		Day 31 st	Month March	Year 2021

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

PO Box 1626	
Doncaster	
Postcode	DN1 9WX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	David Turner Smith	Treasurer		
2	Naveen Judah	Chair		
3	Brian Nelson			
4	Jacqueline Clayton			
5	Eleanor Dabell			
6				
7				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Memoranda and Articles
How the charity is constituted (eg. trust, association, company)	Registered charity and company limited by guarantee
Trustee selection methods (eg. appointed by, elected by)	Elected by members

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

The day to day running of the charity is managed by the trustees. Meetings take place every 6-8 weeks, usually virtually as this meets the needs of trustees but 1 meeting was face-to-face. Decisions between meetings are taken via email, as allowed in our governing documents

The wider membership are kept regularly informed of plans, relevant information and services by monthly e-bulletins, the charities Facebook , Instagram and Twitter accounts and through the website.

New trustees have undertaken our Disability Equality Training module

Section C

Objectives and activities

Summary of the objects of the charity set out in its governing document

1. To provide information, advice, advocacy, training and support to enable Disabled people to have choice and control, and to live independent lives.
2. To raise aspirations and confidence amongst Disabled people, families and carers to facilitate choice, control and independent living.
3. To campaign for the right for Disabled people to have choice and control, in order to live independently and with dignity.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Trustees have had regard to the guidance on public benefit and carried out the following activities:

1. Delivery of specialist Advocacy Service to Disabled people and their families . Support is provided in people's own homes with trained advocates. Demand for our support is rapidly increasing
2. Partnership with Crossroads Care Rotherham to provide benefit support to people with dementia and their carers
3. The Art of Wellbeing project providing craft and activities in Rotherham and Doncaster is thrive. The group based in Maltby makes quilts for hospitalised babies. This creates a safe, welcoming space building confidence and social connections. The new Doncaster Drop-in group meets fortnightly with regular chair-based yoga and other craft sessions. We started a new weekly inclusive cycling group in Doncaster which is very popular.
4. We have continued to provide support information and advice to those who employ their own carers support staff and to the PAs who provide it.
5. We have promoted the right to an independent life with choice and control through working in partnership with service providers to transform their service delivery. We have also supported individuals to utilise appropriate complaints and resolution procedures when necessary.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

All active independence services and activities are considerably enhanced by the contribution of volunteers. Some of these are disabled people and carers who have been helped by active independence and since become active volunteers themselves.

Other volunteers are nondisabled professionals and workers contributing their expertise and knowledge on an unpaid basis, particularly around finances and information technology.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

1. Governance

- continue to stabilise the governance of the charity.

2. Activities

Full details in our 23-24 Annual Report

Highlights:

- Staff restructure and new trainee advocate
- Expansion of Funding strategy
- 666 clients supported

Section D Achievements and performance

- £1.6m raised in benefit entitlements
- New Inclusive cycling group

Section E Financial review

Brief statement of the charity's policy on reserves

We have a reserves policy in which we have established the level of reserves that is prudent for **Active Independence** to have.. This year we needed to draw from reserves to meet the increase in demand on our services but refreshed funding strategy should boost our income into 24-25

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Our main source of funding is grant funding and small contracts to deliver projects such as that from Voluntary Action Rotherham; DMBC and grant funding from the HBJ trust. We are beginning to attract small donations which contribute to our general funds.
Full list in Annual Report

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)



Full name(s)

Barbara Booton

Naveen Judah

Position (eg Secretary, Chair, etc)	CEO	Chair
Date	30/1/24	

Company registration number: 07942039

Charity registration number: 1148975

Active Independence

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 March 2024

Campbell & Stenton Accountancy
The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Contents

Reference and Administrative Details	1
Independent examiner's report	2
Statement of financial activities	3
Balance Sheet	4
Notes to the financial statements	5 to 9

The following pages do not form part of the statutory financial statements:

Statement of financial activities per fund	10 to 11
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Active Independence
Reference and Administrative Details

Charity name	Active Independence
Charity registration number	1148975
Company registration number	7942039
Registered office	The Old Barn, Anchorage Lane Sprotbrough Doncaster DN5 8DT
Secretary	Barbara Booton (Appointed 19 October 2016)
Trustees	David Alan Turner-Smith (Appointed 14 March 2017) Jo Ritson (Resigned 23 January 2023) Kerrie Evans (Resigned 23 January 2023) Naveen Judah (Appointed 21 March 2018) Eleanor Alice Dabell (Appointed 9 February 2022) Jacqueline Clayton (Appointed 23 January 2023) Elizabeth Ann Jeffrey (Appointed 23 January 2023) Brian Nelson (Appointed 21 January 2021)
Accountant	Campbell & Stenton Accountancy The Old Barn Anchorage Lane Sprotbrough Doncaster DN5 8DT

Independent Examiner's Report to the Trustees of

Active Independence

I report on the accounts of the company for the year ended 31 March 2024, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

27 September 2024

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Statement of Financial Activities (including Income and Expenditure Account) for the Year Ended 31 March 2024

		Unrestricted Funds	Restricted Funds	Total Funds Year ended 31 March 2024	Total Funds Period ended 31 March 2023
	Note	£	£	£	£
Incoming resources					
Incoming resources from generated funds					
Voluntary Income	2	1,447	47,670	49,117	40,517
Other incoming resources	4	1,047	68,420	69,467	70,679
Total incoming resources		<u>2,494</u>	<u>116,090</u>	<u>118,584</u>	<u>111,196</u>
Resources expended					
Costs of generating funds					
Costs of generating voluntary income	5	-	-	-	-
Charitable activities - service delivery	5	26,240	96,042	122,282	105,529
Total resources expended		<u>26,240</u>	<u>96,042</u>	<u>122,282</u>	<u>105,529</u>
Net movements in funds		(23,746)	20,048	(3,698)	5,667
Reconciliation of funds					
Total funds brought forward		<u>27,076</u>	<u>56,461</u>	<u>83,537</u>	<u>77,870</u>
Total funds carried forward		<u>3,330</u>	<u>76,509</u>	<u>79,839</u>	<u>83,537</u>

All incoming resources and resources expended derive from continuing activities

Active Independence (Registration number: 07942039)

Balance Sheet as at 31 March 2024

		31 March 2024		31 March 2023	
	Note	£	£	£	£
Fixed Assets					
Tangible assets	9		541		808
Current assets					
Cash at bank and in hand		71,237		83,450	
Debtors		701		120	
		<u>71,938</u>		<u>83,570</u>	
Creditors: Amounts falling due within one year	10	<u>(2,754)</u>		<u>(841)</u>	
Net current assets			69,184		82,729
Net assets			<u>69,725</u>		<u>83,537</u>
The funds of the charity:					
Resticted funds			76,509		56,461
Unrestricted funds					
Unrestricted income funds			3,330		27,076
Total charity funds			<u>79,839</u>		<u>83,537</u>

For the financial year ended 31 March 2024, the charity was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the charity to obtain an audit of its accounts for the period in question in accordance with section 476.

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

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

Approved by the Board on 27 September 2024 and signed on its behalf by:

.....
Barbara Booton
Secretary

The notes on pages 5 to 9 form an integral part of these financial statements.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2024

1 Accounting policies

Basis of preparation

The financial statements have been prepared under the historical cost convention and in accordance with the Statement of Recommended Practice 'Accounting and Reporting by Charities (SORP 2005)', issued in March 2005, applicable accounting standards and the Companies Act 2006. The financial statements have been prepared on a cash basis.

Fund accounting policy

Unrestricted income funds are general funds that are available for use at the trustees' discretion in furtherance of the objectives of the charity.

Restricted funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Further details of each fund are disclosed in note 13.

Incoming resources

Voluntary income including donations and grants that provide core funding or are of a general nature is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Resources expended

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

Costs of generating funds comprise the costs associated with attracting voluntary income and the costs of trading for fundraising purposes.

Fixed assets

Individual fixed assets costing £0 or more are initially recorded at cost.

Depreciation

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Office equipment	33% reducing balance
------------------	----------------------

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2024

2 Voluntary income

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2024 £	Total Funds Period ended 31 March 2023 £
Donations and Legacies				
Donations	1,147	40	1,187	1,720
Grants				
Grants	300	47,630	47,930	38,797
	1,447	47,670	49,117	40,517

3 Grants receivable

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2024 £	Total Funds Period ended 31 March 2023 £
Grants	300	47,630	47,930	38,797

4 Other incoming resources

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2024 £	Total Funds Period ended 31 March 2023 £
Other income				
Managed services Income	-	-	-	-
Other income	1,047	68,420	69,467	70,679
	1,047	68,420	69,467	70,679

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2024

5 Total resources expended

	Grants	Operating activity	Total
	£	£	£
Direct Costs			
Other direct costs		9,970	9,970
Employment costs	-	113,506	113,506
Establishment costs	-	2,344	2,344
Insurance	-	471	471
Advertising	-	358	358
Printing, posting and stationary	-	3,884	3,884
Subscriptions and donations	-	284	284
Sundry and other costs	-	25	25
Accountancy fees	-	1,171	1,171
Bank charges & interest		116	116
Depreciation of tangible fixed assets	-	267	267
	0	132,396	132,396

6 Trustees' remuneration and expenses

No trustees received any remuneration during the period

7 Net (Expenditure)/income

Net (Expenditure)/income is stated after charging

	Year ended 31 March 2024 £	Period ended 31 March 2023 £
Depreciation of owned assets	267	397

8 Taxation

The company is a registered charity and is, therefore, exempt from taxation

Active Independence

Notes to the Financial Statement for the Year Ended 31 March 2024

9 Tangible fixed assets

	Fixtures, fittings and equipment £
Cost	
As at 1 April 2023	3473
Additions	-
At 31 March 2024	<u>3473</u>
Depreciation	
As at 1 April 2023	2665
Charge for the period	267
As at 31 March 2024	<u>2932</u>
Net book value	
As at 31 March 2024	<u>541</u>
As at 31 March 2023	<u>808</u>

10 Creditors: Amounts falling due within one year

	31 March 2024 £	31 March 2023 £
Accruals and deferred income	<u>774</u>	<u>841</u>

11 Members' liability

The charity is a private company limited by guarantee and consequently does not have share capital. Each of the members is liable to contribute an amount not exceeding £nil towards the assets of the charity in the event of liquidation.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2024

12 Related parties

Controlling entity

The charity is controlled by the trustees who are all directors of the company

13 Analysis of funds

	At 1 April 2023	Incoming resources	Resources expended	At 31 March 2024
	£	£	£	£
General Funds				
Unrestricted income fund	27,076	2,494	26,240	3,330
Restricted Funds				
Restricted income fund	56,461	116,090	96,042	76,509
	<u>83,537</u>	<u>118,584</u>	<u>122,282</u>	<u>79,839</u>

14 Net assets by fund

	Unrestricted Funds	Restricted Funds	Total Funds 31 March 2024	Total Funds 31 March 2023
	£	£	£	£
Tangible assets	541	-	541	808
Current assets	3,330	76,509	79,839	83,570
Creditors: Amounts falling due within one year	(2,754)	-	(2,754)	(841)
Net assets	<u>1,117</u>	<u>76,509</u>	<u>77,626</u>	<u>83,537</u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2024

	Unrestricted income fund 2024 £	Unrestricted income fund 2023 £
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	1,447	4,340
Other incoming resources	1,047	4,628
Total incoming resources	<u>2,494</u>	<u>8,968</u>
Resources expended		
Costs of generating funds		
Charitable activities - service delivery	26,240	40,679
Total resources expended	<u>26,240</u>	<u>40,679</u>
Net movements in funds	(23,746)	(31,711)
Reconciliation of funds		
Total funds brought forward	27,076	58,787
Total funds carried forward	<u><u>3,330</u></u>	<u><u>27,076</u></u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2024

..... continued

	Restricted income fund 2024 £	Restricted income fund 2023 £
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	47,670	36,177
Other incoming resources	68,420	66,051
Total incoming resources	<u>116,090</u>	<u>102,228</u>
Resources expended		
Costs of generating funds		
Costs of generating voluntary income	-	-
Charitable activities - service delivery	96,042	64,850
Total resources expended	<u>96,042</u>	<u>64,850</u>
Net movements in funds	20,048	37,378
Reconciliation of funds		
Total funds brought forward	56,461	19,083
Total funds carried forward	<u><u>76,509</u></u>	<u><u>56,461</u></u>

This page does not form part of the statutory financial statements.

Independent Examiner's Report to the Trustees of

Active Independence

I report on the accounts of the company for the year ended 31 March 2024, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

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In connection with my examination, no matter has come to my attention:

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 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

27 September 2024

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

ACTIVE INDEPENDENCE

England & Wales - Charity number 1148975

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day	Month	Year		Day	Month	Year
	1	April	2020		31 st	March	2021

Section A Reference and administration details

Charity name

Active Independence

Other names charity is known by

Registered charity number (if any)

1148975

Charity's principal address

PO Box 1626

Doncaster

Postcode

DN1 9WX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	David Turner Smith	Treasurer		
2	Barbara Booton	Secretary		
3				
4	Naveen Judah	Chair		
5	Brian Nelson			
6	Jacqueline Clayton			
7	Mohammed Ramzan		23/1/23	
8	Eleanor Dabell			
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Memoranda and Articles
How the charity is constituted (eg. trust, association, company)	Registered charity and company limited by guarantee
Trustee selection methods (eg. appointed by, elected by)	Elected by members

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

The day to day running of the charity is managed by the trustees. Meetings have mostly continued virtually as this meets the needs of trustees but 1 meeting was face-to-face .

The wider membership are kept regularly informed of plans, relevant information and services by monthly e-bulletins, the charities Facebook , Instagram and Twitter accounts and through the website.

New trustees have undertaken our Disability Equality Training module

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

1. To provide information, advice, advocacy, training and support to enable Disabled people to have choice and control, and to live independent lives.
2. To raise aspirations and confidence amongst Disabled people, families and carers to facilitate choice, control and independent living.
3. To campaign for the right for Disabled people to have choice and control, in order to live independently and with dignity.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Trustees have had regard to the guidance on public benefit and carried out the following activities:

1. Delivery of specialist Advocacy Service to Disabled people and their families . Support is provided in people's own homes with trained advocates. Demand for our support is rapidly increasing
2. development of the new service "Active solutions" in partnership with age UK and Crossroads Care Rotherham continued
3. The Art of Wellbeing project providing craft and activities in Rotherham and Doncaster has started to thrive. The group based in Maltby makes quilts for sick hospitalised baby's. This creates a safe, welcoming space building confidence and social connections. The new Doncaster Drop-in group meets fortnightly with regular chair-based yoga and other craft sessions.
4. We have continued to provide support information and advice to those who employ their own carers support staff and to the PAs who provide it.
5. We have promoted the right to an independent life with choice and control through working in partnership with service providers to transform their service delivery. We have also supported individuals to utilise appropriate complaints and resolution procedures when necessary.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

All active independence services and activities are considerably enhanced by the contribution of volunteers. Some of these are disabled people and carers who have been helped by active independence and since become active volunteers themselves. Other volunteers are nondisabled professionals and workers contributing their expertise and knowledge on an unpaid basis, particularly around finances and information technology.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

1. Governance

- continue to stabilise the governance of the charity with recruitment of another experienced trustee.

2. Activities

Section D

Achievements and performance

In carrying out the objectives of our organisation we undertook a range of activities:

Events and promotional activities

It is important we keep in touch with our wider membership and we have done this through:

- AGM event
- Monthly E bulletins
- communicating through our website as well as our X (@active_ind) and Facebook accounts

Projects

- Development of RMBC pre-front door service “Active Solutions”
- Art of Well-Being – craft sessions for disabled people, their carers and families.

Services

Our primary service is Advocacy. This is funded through an SLA with the VAR Social Prescribing Service – we also secured another SLA to support people with poor Mental Health plus grant funding from the HBJ trust fund for clients not covered by social prescribing.

- Secured **£899,000** in welfare entitlements
- Supported 578 clients on a range of issues related to independent living including: welfare benefits; Personal health Budgets; CHC assessments; housing; employment issues; community care assessment; stroke support; equipment; recruitment and retention issues

PA Support Service – Continued contract with DMBC to deliver this innovative and ground-breaking service. It offers confidential 1-1 support and guidance for PAs and monthly newsletters.

Direct payments support service

PA recruitment – utilising the re-built website to promote PAs to register their profile and employers to advertise vacancies.

Section E

Financial review

Brief statement of the charity's policy on reserves

We have a reserves policy in which we have established the level of reserves that is prudent for **Active Independence** to have.. To date we have managed to considerably increase our reserves to the required 6 months running costs – unfortunately we expect to need to draw on some of this 23-24 to cover increased staff hours

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Our main source of funding is grant funding and small contracts to deliver projects such as that from Voluntary Action Rotherham; DMBC and grant funding from the HBJ trust. We are beginning to attract small donations which contribute to our general funds.

Section F

Other optional information

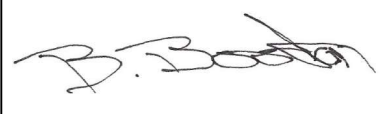
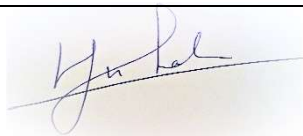
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Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Barbara Booton	Naveen Judah
Position (eg Secretary, Chair, etc)	Secretary	Chair
Date	22/2/24	

Company registration number: 07942039
Charity registration number: 1148975

Active Independence

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 March 2023

Campbell & Stenton Accountancy
The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

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Balance Sheet	4
Notes to the financial statements	5 to 9

The following pages do not form part of the statutory financial statements:

Statement of financial activities per fund	10 to 11
--	----------

Active Independence
Reference and Administrative Details

Charity name	Active Independence
Charity registration number	1148975
Company registration number	7942039
Registered office	The Old Barn, Anchorage Lane Sprotbrough Doncaster DN5 8DT
Secretary	Barbara Booton (Appointed 19 October 2016)
Trustees	David Alan Turner-Smith (Appointed 14 March 2017) Jo Ritson (Resigned 23 January 2023) Kerrie Evans (Resigned 23 January 2023) Naveen Judah (Appointed 21 March 2018) Eleanor Alice Dabell (Appointed 9 February 2022) Jacqueline Clayton (Appointed 23 January 2023) Elizabeth Ann Jeffrey (Appointed 23 January 2023) Brian Nelson (Appointed 21 January 2021)
Accountant	Campbell & Stenton Accountancy The Old Barn Anchorage Lane Sprotbrough Doncaster DN5 8DT

Independent Examiner's Report to the Trustees of Active Independence

I report on the accounts of the company for the year ended 31 March 2023, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

11 October 2023

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Statement of Financial Activities (including Income and Expenditure Account) for the Year Ended 31 March 2023

		Unrestricted Funds	Restricted Funds	Total Funds Year ended 31 March 2023	Total Funds Period ended 31 March 2022
	Note	£	£	£	£
Incoming resources					
Incoming resources from generated funds					
Voluntary Income	2	4,340	36,177	40,517	52,303
Other incoming resources	4	4,628	66,051	70,679	32,582
Total incoming resources		<u>8,968</u>	<u>102,228</u>	<u>111,196</u>	<u>84,885</u>
Resources expended					
Costs of generating funds					
Costs of generating voluntary income	5	-	-	-	-
Charitable activities - service delivery	5	40,679	64,850	105,529	73,785
Total resources expended		<u>40,679</u>	<u>64,850</u>	<u>105,529</u>	<u>73,785</u>
Net movements in funds		(31,711)	37,378	5,667	11,100
Reconciliation of funds					
Total funds brought forward		<u>58,787</u>	<u>19,083</u>	<u>77,870</u>	<u>66,770</u>
Total funds carried forward		<u><u>27,076</u></u>	<u><u>56,461</u></u>	<u><u>83,537</u></u>	<u><u>77,870</u></u>

All incoming resources and resources expended derive from continuing activities

Active Independence (Registration number: 07942039)

Balance Sheet as at 31 March 2023

		31 March 2023		31 March 2022	
	Note	£	£	£	£
Fixed Assets					
Tangible assets	9		808		1,205
Current assets					
Cash at bank and in hand		83,450		78,972	
Debtors		120		-	
		<u>83,570</u>		<u>78,972</u>	
Creditors: Amounts falling due within one year	10	<u>(841)</u>		<u>(2,307)</u>	
Net current assets			<u>82,729</u>		<u>76,665</u>
Net assets			<u><u>83,537</u></u>		<u><u>77,870</u></u>

The funds of the charity:

Restricted funds		56,461		19,083
Unrestricted funds				
Unrestricted income funds		27,076		58,787
Total charity funds		<u><u>83,537</u></u>		<u><u>77,870</u></u>

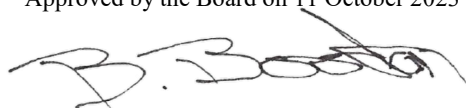
For the financial year ended 31 March 2023, the charity was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the charity to obtain an audit of its accounts for the period in question in accordance with section 476.

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

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

Approved by the Board on 11 October 2023 and signed on its behalf by:



.....
Barbara Booton
Secretary

The notes on pages 5 to 9 form an integral part of these financial statements.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

1 Accounting policies

Basis of preparation

The financial statements have been prepared under the historical cost convention and in accordance with the Statement of Recommended Practice 'Accounting and Reporting by Charities (SORP 2005)', issued in March 2005, applicable accounting standards and the Companies Act 2006. The financial statements have been prepared on a cash basis.

Fund accounting policy

Unrestricted income funds are general funds that are available for use at the trustees' discretion in furtherance of the objectives of the charity.

Restricted funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Further details of each fund are disclosed in note 13.

Incoming resources

Voluntary income including donations and grants that provide core funding or are of a general nature is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Resources expended

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

Costs of generating funds comprise the costs associated with attracting voluntary income and the costs of trading for fundraising purposes.

Fixed assets

Individual fixed assets costing £0 or more are initially recorded at cost.

Depreciation

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Office equipment	33% reducing balance
------------------	----------------------

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

2 Voluntary income

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2023 £	Total Funds Period ended 31 March 2022 £
Donations and Legacies				
Donations	720	1,000	1,720	118
Grants				
Grants	3,620	35,177	38,797	52,185
	4,340	36,177	40,517	52,303

3 Grants receivable

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2023 £	Total Funds Period ended 31 March 2022 £
Grants	3,620	35,177	38,797	52,185

4 Other incoming resources

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2023 £	Total Funds Period ended 31 March 2022 £
Other income				
Managed services Income	-	-	-	-
Other income	4,628	66,051	70,679	32,582
	4,628	66,051	70,679	32,582

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

5 Total resources expended

	Grants	Operating activity	Total
	£	£	£
Direct Costs			
Other direct costs		5,463	5,463
Employment costs	-	92,446	92,446
Establishment costs	-	775	775
Insurance	-	471	471
Advertising	-	-	0
Printing, posting and stationary	-	2,546	2,546
Subscriptions and donations	-	144	144
Sundry and other costs	-	2,032	2,032
Accountancy fees	-	1,122	1,122
Bank charges & interest		133	133
Depreciation of tangible fixed assets	-	397	397
	0	105,529	105,529

6 Trustees' remuneration and expenses

No trustees received any remuneration during the period

7 Net (Expenditure)/income

Net (Expenditure)/income is stated after charging

	Year ended 31 March 2023 £	Period ended 31 March 2022 £
Depreciation of owned assets	397	593

8 Taxation

The company is a registered charity and is, therefore, exempt from taxation

Active Independence

Notes to the Financial Statement for the Year Ended 31 March 2023

9 Tangible fixed assets

	Fixtures, fittings and equipment £
Cost	
As at 1 April 2022	3473
Additions	-
At 31 March 2023	<u>3473</u>
Depreciation	
As at 1 April 2022	2268
Charge for the period	397
As at 31 March 2023	<u><u>2665</u></u>
Net book value	
As at 31 March 2023	<u><u>808</u></u>
As at 31 March 2022	<u><u>1205</u></u>

10 Creditors: Amounts falling due within one year

	31 March 2023 £	31 March 2022 £
Accruals and deferred income	841	778

11 Members' liability

The charity is a private company limited by guarantee and consequently does not have share capital. Each of the members is liable to contribute an amount not exceeding £nil towards the assets of the charity in the event of liquidation.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

12 Related parties

Controlling entity

The charity is controlled by the trustees who are all directors of the company

13 Analysis of funds

	At 1 April 2022	Incoming resources	Resources expended	At 31 March 2023
	£	£	£	£
General Funds				
Unrestricted income fund	58,787	8,968	40,679	27,076
Restricted Funds				
Restricted income fund	19,083	102,228	64,850	56,461
	<u>77,870</u>	<u>111,196</u>	<u>105,529</u>	<u>83,537</u>

14 Net assets by fund

	Unrestricted Funds	Restricted Funds	Total Funds 31 March 2023	Total Funds 31 March 2022
	£	£	£	£
Tangible assets	808	-	808	1,205
Current assets	27,109	56,461	83,570	79,972
Creditors: Amounts falling due within one year	(841)	-	(841)	(2,307)
Net assets	<u>27,076</u>	<u>56,461</u>	<u>83,537</u>	<u>78,870</u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2023

	Unrestricted income fund 2023	Unrestricted income fund 2022
	£	£
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	4,340	17,988
Other incoming resources	4,628	1,582
Total incoming resources	<u>8,968</u>	<u>19,570</u>
Resources expended		
Costs of generating funds		
Charitable activities - service delivery	40,679	6,359
Total resources expended	<u>40,679</u>	<u>6,359</u>
Net movements in funds	(31,711)	13,211
Reconciliation of funds		
Total funds brought forward	58,787	45,576
Total funds carried forward	<u><u>27,076</u></u>	<u><u>58,787</u></u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2023

..... continued

	Restricted income fund 2023 £	Restricted income fund 2022 £
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	36,177	34,315
Other incoming resources	66,051	31,000
Total incoming resources	<u>102,228</u>	<u>65,315</u>
Resources expended		
Costs of generating funds		
Costs of generating voluntary income	-	-
Charitable activities - service delivery	64,850	67,426
Total resources expended	<u>64,850</u>	<u>67,426</u>
Net movements in funds	37,378	(2,111)
Reconciliation of funds		
Total funds brought forward	<u>19,083</u>	<u>21,194</u>
Total funds carried forward	<u><u>56,461</u></u>	<u><u>19,083</u></u>

This page does not form part of the statutory financial statements.

Company registration number: 07942039
Charity registration number: 1148975

Active Independence

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 March 2023

Campbell & Stenton Accountancy
The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

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Notes to the financial statements	5 to 9

The following pages do not form part of the statutory financial statements:

Statement of financial activities per fund	10 to 11
--	----------

Active Independence
Reference and Administrative Details

Charity name	Active Independence
Charity registration number	1148975
Company registration number	7942039
Registered office	The Old Barn, Anchorage Lane Sprotbrough Doncaster DN5 8DT
Secretary	Barbara Booton (Appointed 19 October 2016)
Trustees	David Alan Turner-Smith (Appointed 14 March 2017) Jo Ritson (Resigned 23 January 2023) Kerrie Evans (Resigned 23 January 2023) Naveen Judah (Appointed 21 March 2018) Eleanor Alice Dabell (Appointed 9 February 2022) Jacqueline Clayton (Appointed 23 January 2023) Elizabeth Ann Jeffrey (Appointed 23 January 2023) Brian Nelson (Appointed 21 January 2021)
Accountant	Campbell & Stenton Accountancy The Old Barn Anchorage Lane Sprotbrough Doncaster DN5 8DT

Independent Examiner's Report to the Trustees of Active Independence

I report on the accounts of the company for the year ended 31 March 2023, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

11 October 2023

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Statement of Financial Activities (including Income and Expenditure Account) for the Year Ended 31 March 2023

		Unrestricted Funds	Restricted Funds	Total Funds Year ended 31 March 2023	Total Funds Period ended 31 March 2022
	Note	£	£	£	£
Incoming resources					
Incoming resources from generated funds					
Voluntary Income	2	4,340	36,177	40,517	52,303
Other incoming resources	4	4,628	66,051	70,679	32,582
Total incoming resources		<u>8,968</u>	<u>102,228</u>	<u>111,196</u>	<u>84,885</u>
Resources expended					
Costs of generating funds					
Costs of generating voluntary income	5	-	-	-	-
Charitable activities - service delivery	5	40,679	64,850	105,529	73,785
Total resources expended		<u>40,679</u>	<u>64,850</u>	<u>105,529</u>	<u>73,785</u>
Net movements in funds		(31,711)	37,378	5,667	11,100
Reconciliation of funds					
Total funds brought forward		<u>58,787</u>	<u>19,083</u>	<u>77,870</u>	<u>66,770</u>
Total funds carried forward		<u><u>27,076</u></u>	<u><u>56,461</u></u>	<u><u>83,537</u></u>	<u><u>77,870</u></u>

All incoming resources and resources expended derive from continuing activities

Active Independence (Registration number: 07942039)

Balance Sheet as at 31 March 2023

		31 March 2023		31 March 2022	
	Note	£	£	£	£
Fixed Assets					
Tangible assets	9		808		1,205
Current assets					
Cash at bank and in hand		83,450		78,972	
Debtors		120		-	
		<u>83,570</u>		<u>78,972</u>	
Creditors: Amounts falling due within one year	10	<u>(841)</u>		<u>(2,307)</u>	
Net current assets			82,729		76,665
Net assets			<u>83,537</u>		<u>77,870</u>

The funds of the charity:

Restricted funds		56,461		19,083
Unrestricted funds				
Unrestricted income funds		27,076		58,787
Total charity funds		<u>83,537</u>		<u>77,870</u>

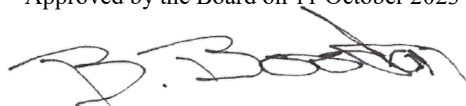
For the financial year ended 31 March 2023, the charity was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the charity to obtain an audit of its accounts for the period in question in accordance with section 476.

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

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

Approved by the Board on 11 October 2023 and signed on its behalf by:



.....
Barbara Booton
Secretary

The notes on pages 5 to 9 form an integral part of these financial statements.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

1 Accounting policies

Basis of preparation

The financial statements have been prepared under the historical cost convention and in accordance with the Statement of Recommended Practice 'Accounting and Reporting by Charities (SORP 2005)', issued in March 2005, applicable accounting standards and the Companies Act 2006. The financial statements have been prepared on a cash basis.

Fund accounting policy

Unrestricted income funds are general funds that are available for use at the trustees' discretion in furtherance of the objectives of the charity.

Restricted funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Further details of each fund are disclosed in note 13.

Incoming resources

Voluntary income including donations and grants that provide core funding or are of a general nature is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Resources expended

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

Costs of generating funds comprise the costs associated with attracting voluntary income and the costs of trading for fundraising purposes.

Fixed assets

Individual fixed assets costing £0 or more are initially recorded at cost.

Depreciation

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Office equipment	33% reducing balance
------------------	----------------------

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

2 Voluntary income

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2023 £	Total Funds Period ended 31 March 2022 £
Donations and Legacies				
Donations	720	1,000	1,720	118
Grants				
Grants	3,620	35,177	38,797	52,185
	4,340	36,177	40,517	52,303

3 Grants receivable

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2023 £	Total Funds Period ended 31 March 2022 £
Grants	3,620	35,177	38,797	52,185

4 Other incoming resources

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2023 £	Total Funds Period ended 31 March 2022 £
Other income				
Managed services Income	-	-	-	-
Other income	4,628	66,051	70,679	32,582
	4,628	66,051	70,679	32,582

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

5 Total resources expended

	Grants	Operating activity	Total
	£	£	£
Direct Costs			
Other direct costs		5,463	5,463
Employment costs	-	92,446	92,446
Establishment costs	-	775	775
Insurance	-	471	471
Advertising	-	-	0
Printing, posting and stationary	-	2,546	2,546
Subscriptions and donations	-	144	144
Sundry and other costs	-	2,032	2,032
Accountancy fees	-	1,122	1,122
Bank charges & interest		133	133
Depreciation of tangible fixed assets	-	397	397
	0	105,529	105,529

6 Trustees' remuneration and expenses

No trustees received any remuneration during the period

7 Net (Expenditure)/income

Net (Expenditure)/income is stated after charging

	Year ended 31 March 2023 £	Period ended 31 March 2022 £
Depreciation of owned assets	397	593

8 Taxation

The company is a registered charity and is, therefore, exempt from taxation

Active Independence

Notes to the Financial Statement for the Year Ended 31 March 2023

9 Tangible fixed assets

	Fixtures, fittings and equipment £
Cost	
As at 1 April 2022	3473
Additions	-
At 31 March 2023	<u>3473</u>
Depreciation	
As at 1 April 2022	2268
Charge for the period	397
As at 31 March 2023	<u><u>2665</u></u>
Net book value	
As at 31 March 2023	<u><u>808</u></u>
As at 31 March 2022	<u><u>1205</u></u>

10 Creditors: Amounts falling due within one year

	31 March 2023 £	31 March 2022 £
Accruals and deferred income	841	778

11 Members' liability

The charity is a private company limited by guarantee and consequently does not have share capital. Each of the members is liable to contribute an amount not exceeding £nil towards the assets of the charity in the event of liquidation.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2023

12 Related parties

Controlling entity

The charity is controlled by the trustees who are all directors of the company

13 Analysis of funds

	At 1 April 2022	Incoming resources	Resources expended	At 31 March 2023
	£	£	£	£
General Funds				
Unrestricted income fund	58,787	8,968	40,679	27,076
Restricted Funds				
Restricted income fund	19,083	102,228	64,850	56,461
	<u>77,870</u>	<u>111,196</u>	<u>105,529</u>	<u>83,537</u>

14 Net assets by fund

	Unrestricted Funds	Restricted Funds	Total Funds 31 March 2023	Total Funds 31 March 2022
	£	£	£	£
Tangible assets	808	-	808	1,205
Current assets	27,109	56,461	83,570	79,972
Creditors: Amounts falling due within one year	(841)	-	(841)	(2,307)
Net assets	<u>27,076</u>	<u>56,461</u>	<u>83,537</u>	<u>78,870</u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2023

	Unrestricted income fund 2023	Unrestricted income fund 2022
	£	£
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	4,340	17,988
Other incoming resources	4,628	1,582
Total incoming resources	<u>8,968</u>	<u>19,570</u>
Resources expended		
Costs of generating funds		
Charitable activities - service delivery	40,679	6,359
Total resources expended	<u>40,679</u>	<u>6,359</u>
Net movements in funds	(31,711)	13,211
Reconciliation of funds		
Total funds brought forward	58,787	45,576
Total funds carried forward	<u><u>27,076</u></u>	<u><u>58,787</u></u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2023

..... continued

	Restricted income fund 2023 £	Restricted income fund 2022 £
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	36,177	34,315
Other incoming resources	66,051	31,000
Total incoming resources	<u>102,228</u>	<u>65,315</u>
Resources expended		
Costs of generating funds		
Costs of generating voluntary income	-	-
Charitable activities - service delivery	64,850	67,426
Total resources expended	<u>64,850</u>	<u>67,426</u>
Net movements in funds	37,378	(2,111)
Reconciliation of funds		
Total funds brought forward	<u>19,083</u>	<u>21,194</u>
Total funds carried forward	<u><u>56,461</u></u>	<u><u>19,083</u></u>

This page does not form part of the statutory financial statements.

ACTIVE INDEPENDENCE

England & Wales - Charity number 1148975

Accounts



Annual Report

2020 - 2021



Active Independence

Welcome

Welcome to Active Independence's annual report which summarises our activities from April 2020 to March 2021.

This was, of course, an unprecedented year for all of us. As we faced the challenges of lockdowns and restrictions I am proud to say our staff worked tirelessly under difficult conditions to help Disabled people, their families and PAs. Fortunately we were able to access additional money from emergency Covid funds to support this work.

Our Advocacy work has never been busier and demand for PA Support service dramatically increased as well as our involvement in the roll out of the vaccine programme to care workers. The details of our activities are in the report.

We couldn't do what we do without the support of those who work with us:

- We are very proud to have such a team of skilled, experienced **advocates and workers** helping Active Independence deliver such a high-quality service.
- Our **Trustees** and **volunteers**.

We would like to thank our strategic partners and funders:

- ❖ HBJ Trust
- ❖ South Yorkshire Community Foundation – Covid-19 relief fund
- ❖ Voluntary Action Rotherham
- ❖ DMBC
- ❖ RMBC
- ❖ DPO Covid-19 Emergency Fund
- ❖ client donations

Naveen Judah (Chair)

Committee Members:

Naveen Judah (Chair)

Barbara Booton (Secretary)

Jaqueline Clayton (Trustee)

David Turner-Smith (Treasurer)

Jo Ritson (Trustee)

Kerrie Evans (Trustee)

Eleanor Dabell

1. Our Aims

We have 3 broad aims which underpin all the work that we do:

- To provide **information, advice, advocacy, training and support to enable** Disabled people to have choice and control, and to live independent lives.
- To **raise Aspirations and confidence** amongst Disabled people, families and carers to facilitate choice, control and independent living.
- To **campaign** for the right for Disabled people to have choice and control, in order to live independently and with dignity

In carrying out the aims of our organisation we undertook a range of activities which are summarised under the following headings

- Campaigns
- Events/promotion
- Training
- Projects & Services

2. Activities

Campaigns

As a disabled persons-led organisation founded on the social model of disability, we believe it is our role to challenge and question policymakers and service providers and to encourage them to work together with us to help make systems and services more person-centred. We do this through our active Twitter and Facebook pages and by taking part in numerous consultations, user groups and regional area networks. During the pandemic we have been unable to attend networking events so have focused on online media opportunities.

We have raised issues such as: PPE for PAs; use of direct payments during Covid: PAs as key workers; the ongoing campaign for social care reforms.

Training

Training is essential for both people who employ PAs and the PAs themselves. Good quality, relevant training helps to ensure people have the information and skills needed to build positive employer/employee relationships and promotes care and support with safety and dignity.

We spent many weeks completely overhauling our online employer course. This is now split into: part 1 – Recruiting a PA; part 2 – Being a Good Employer .

this adds to our current offer of:

- Personalisation & Assessment Process
- The Role of the PA
- Disability Equality Training
- Let's Talk about Restraints

3. Projects and Services

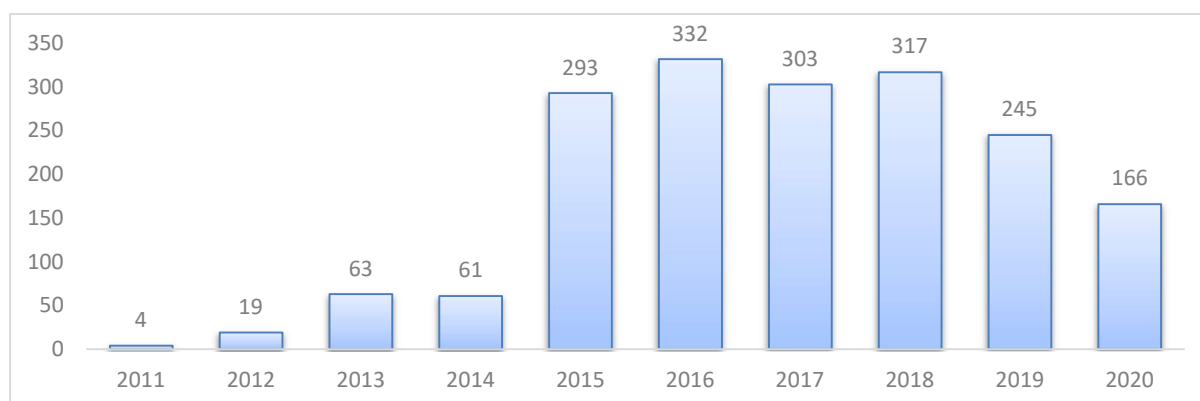
Advocacy

We work with a highly skilled team of specialist advocates trained in the social model of disability and in disability benefits.

Funding for advocacy 20 - 21:

- Rotherham Social Prescribing Service - Contract with Voluntary Action Rotherham.
- HBJ Trust

Total Number of Clients Supported since 2011



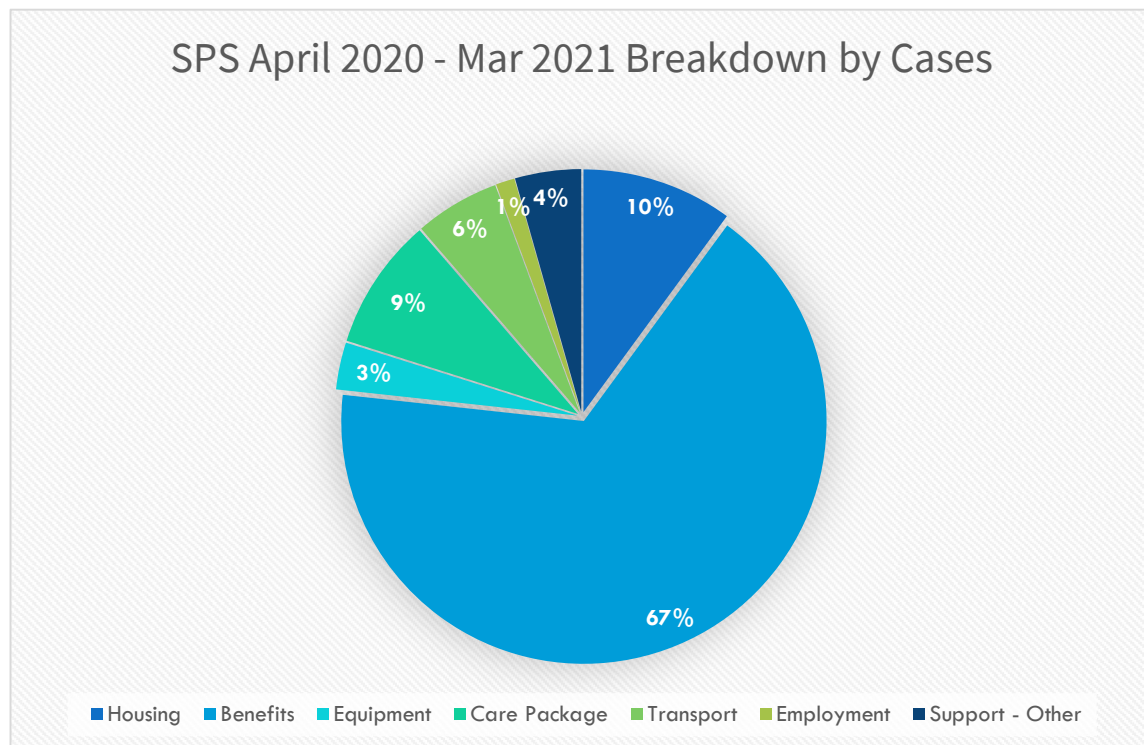
Inevitably, there was a dramatic decrease in referrals this year as people isolated and shielded such that. We did, however, continue to provide advocacy support throughout via telephone and, when appropriate, home visiting (taking all necessary precautions).

Outputs 20 - 21:

Area	Clients Closed	Benefits gained
Rotherham SPS Funded	128	£235,610
HBJ Funded	38	£97,670
Total	245	£333,278

Rotherham SPS Funded Advocacy Project

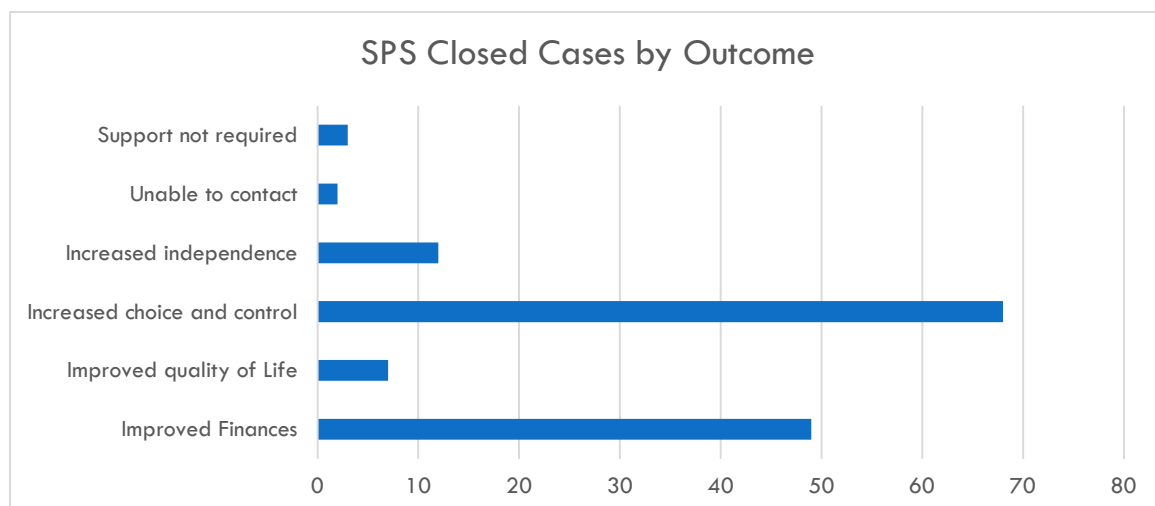
The following pie charts show the main issue of support we often clients. Something they came with one issue but as we work with them, we come across other areas they need support with



The above chart clearly shows the predominance of benefit enquiries. This reflects the very challenging times disabled people are facing in terms of accessing their welfare entitlements.

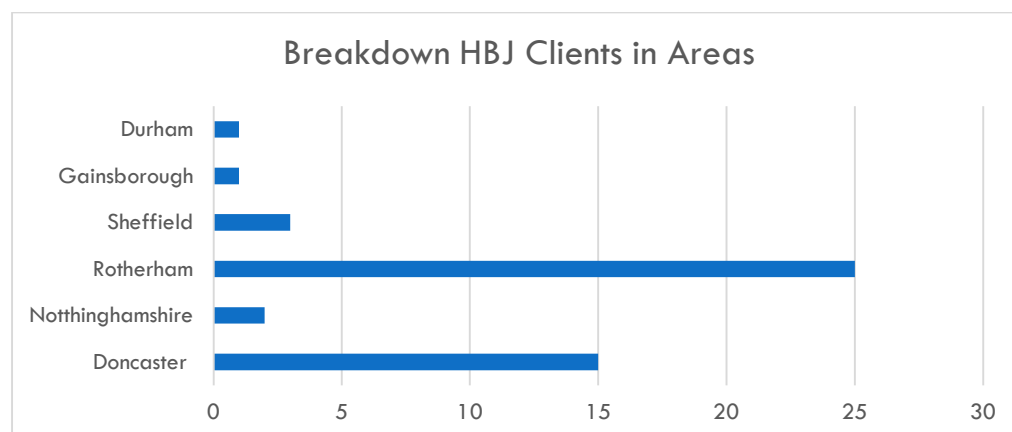
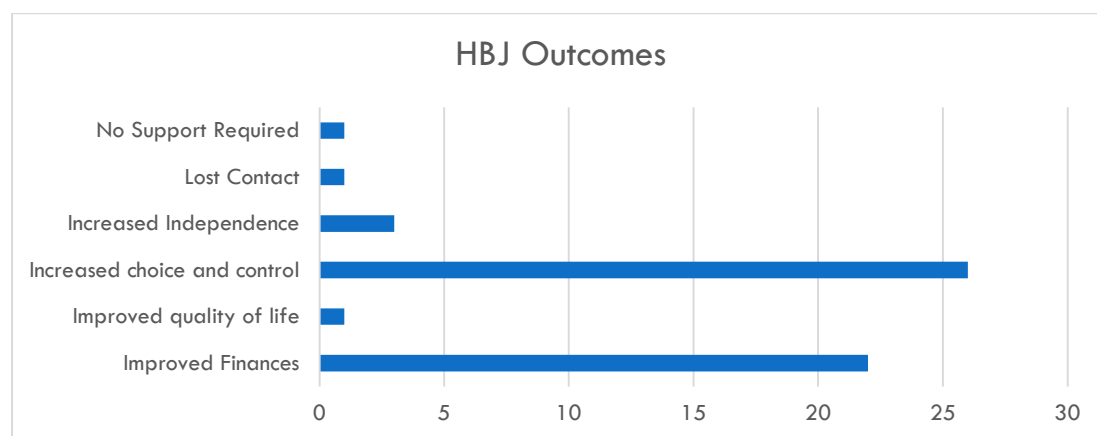
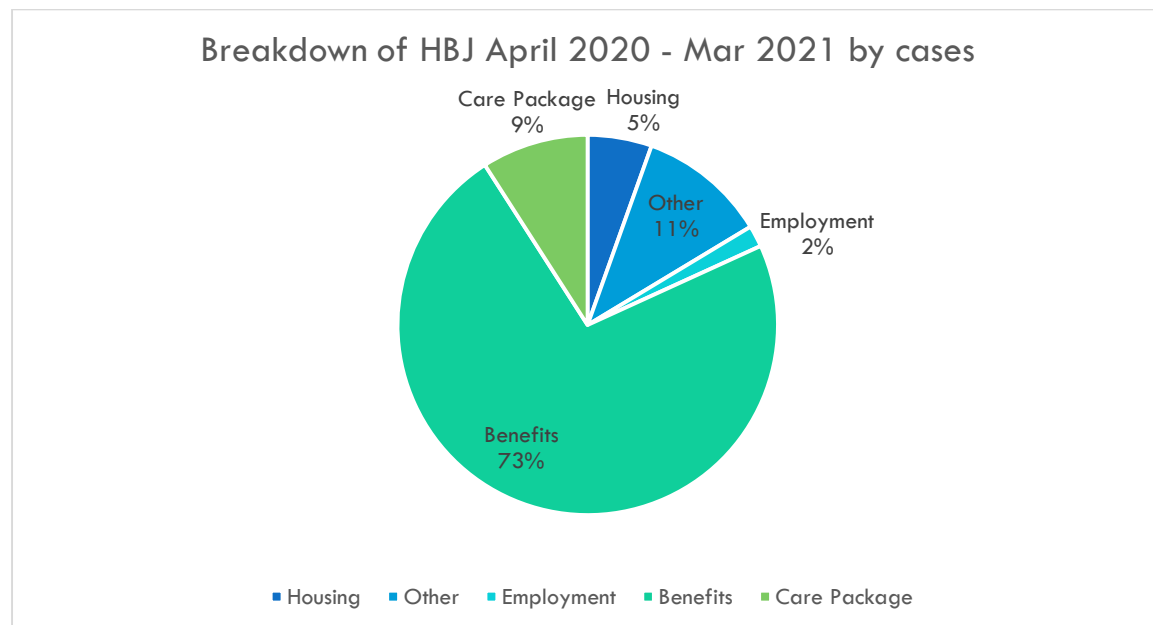
Outcomes

Fortunately, with the support of our skilled Advocates, most of our clients achieve a successful outcome:



HBJ Funding

We were extremely fortunate to once again receive a grant from the HBJ trust. This funding enables us to provide advocacy for disabled people who are not funded by any other source



Case Studies

Our support has helped to reduce the stress that many clients were experiencing. They feel more financially secure have greater independence and control of their care and support needs, increasing their quality of life, health and well-being. The following case studies reflect the diversity of our advocacy work

Client BM

Initial Issues

We have supported this client at different times since May 2017. In February 2021, Client contacted us directly asking support to renew blue badge

Intervention

- Completed online Blue Badge application with client in Feb and received confirmation been successful in March 2021.
- During visit in March, asked support to help his wife complete AA renewal form. Interviewed and completed form. In April wife was awarded High-Rate AA.

Outcomes

- successful obtained Blue Badge which leads to great independence for the client.
- improved their financial income as now receiving £89.60 per week (an additional £20 pw)

“You are so valued by all in all your knowledge of services in and around Doncaster, advice and telephone numbers that are so needed to support service users and PAs are essential, you are a listening ear for emotional support to us all, thank God you’re around” PA

Client KH

Initial Issues

request for help on getting a bus pass, advice and issue with Council tax benefit debt and accessing memory clinic (awaiting formal diagnosis). The client has dyslexia and is quite vulnerable regarding money matters due to his memory issues.

Intervention

- Between Feb 2020 - March 2020 Dealt with council about his **debt** but linked to Universal Credit claim, so will be taken directly from that. Arrange appointment with memory clinic. Bus pass decided to wait until covid-19 restrictions lifted.
- May 2020 - Completed a **PIP application**.

- October 2020 - Turned down for PIP claim - supported to complete MR and collected evidence.
- Jan 2021 - PIP MR decision not overturned
- Feb 2021 -DWP changed decision and awarded Standard Living and back pay. He was very happy with the decision and brought himself a much-needed new TV with backpay.
- March 2021 Looked at **Bus pass** again. Rang Council - he needed letter from doctor about his vascular dementia. Council issued a letter stating he had been awarded Discretionary Pass . Complete online form and provide requested evidence.
- March 2021 completed online **census** form

Outcomes

Client was diagnosed with Vascular Dementia.

- increased his quality-of-life by helping to deal with issues regarding debt and memory clinic
- Improved his financial position by helping to claim and appeal PIP to be finally awarded PIP standard living
- Increased his choice and control as he was able to completed online census with assistance from our advocate
- Greater Independence by helping organise his Bus Pass

Client DA

Initial Issues

Client's health had deteriorated and so wanted her PIP reviewed. DA was transferred to PIP from DLA the previous year and had award reduced but, at that time, could not face appealing.

Interventions

- Contacted PIP on behalf of client as she did not have credit for her phone.
- Interviewed client so we could complete the PIP reassessment form and posted within time scales..
- After long delays to the pandemic, the client finally had her PIP assessment in August and awarded Enhanced Daily Living and Enhanced mobility in August 2020

Outcome:

- greatly Improved financial position, by helping to claim for PIP

Abbreviations used:

- DLA – Disability Living Allowance
- DWP – Department for Work and Pensions

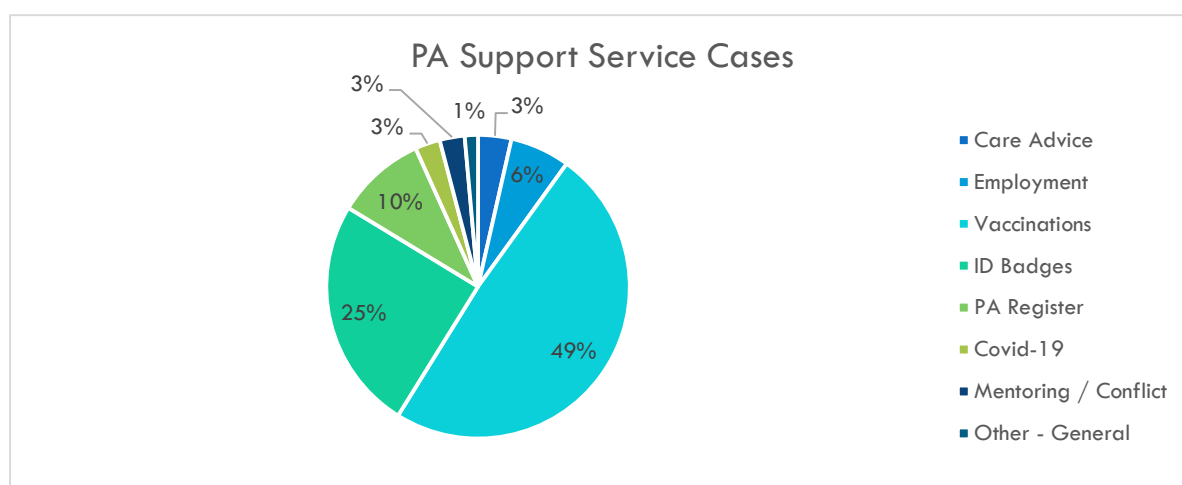
- PIP – Personal Independence Payment
- ESA – Employment & Support Allowance

I am really glad that my friend brought us together. You have been a massive help. I was struggling to get my blue badge as I cannot get online, and this was such a help.

Since then, you have also helped me with Carers Allowance, PIP Appeal and Universal Credit. I have so much on my plate and it nice knowing I have someone in the background who can help, this makes a huge difference. My advocate is a good person to have in your corner. I am really pleased with the service and she is very professional.

PA Support Service

This was an unprecedented year for the service and, times, the demand from PAs and their employers was overwhelming. We supported 374 clients (PA and employers) with over 556 enquiries.



Support included:

- printing and distributing ID badges and providing key worker letters.
- Promoting Covid-19 vaccinations to PAs and online bookings.
- Providing emergency PPE packs and securing contacts for them to access PPE in the longer term.
- Reviewed fee structure for employers placing advert and set up Stripe payment system.
- Implement training Checklist for PAs

PA Register

We run an online register, which is free for PAs to join. It provides a platform for individual employers to advertise for jobs, for a small fee, and it allows PAs to upload their details and apply for available positions. We also provide ongoing support through the recruitment process plus ongoing help and guidance to help people manage their direct payment and to ensure people are safe and responsible employers.

- Revised and tidy up PA Register Platform and webpages supporting the service
- Reviewed all contract and paperwork for PA
- Skills for Care Project –
- Start monthly 2 separate e-bulletins for members and PAs
- Rewrite How to Recruit PA – Part 1
- Train 10 Employers??

We supported 24 employers to place adverts to recruit PAs and processed 52 applications from PAs.

Many thanks for your help-it has been invaluable. You were able to assist with a quote for Access to work, ensure I received my Covid vaccination and also provide a contact for PPE. I also carry a letter (based on your template) and id badge explaining that I am a key worker, have read your guidance on the use and safe disposal of PPE.

Governance

Lockdown's gave us opportunity to apply for emergency Covid-19 funding and used some of this to overhaul and review of governance:

- Reviewed all our Governance starter pack and relevant paperwork.
- Reviewed all policies and developed new one required
- Employed three members of staff on contracts.
- Set up Employers Handbook, Induction and paperwork
- Updated all risk assessments
- Purchased Office equipment for staff
- Reviewed and updated the Active Independence website and Facebook pages
- purchased a new case recording and management system, Charity log – including 3 days training.
- uploaded all previous years Data; trained all staff in its use

Provided evidence to support the concept of the new Active Solutions Partnership for Rotherham

Art of Wellbeing

Cancelled due to covid – 60 packs out were sent to clients to complete at home. Brian shared video on Facebook to help complete. This helped us to keep in contact with people help to reduce their isolation and loneliness

Thank you so so much this PA newsletter is fantastic, and help for PA Badges. I cannot thank you enough just knowing that someone out there recognises us & cares enough to have a newsletter.

Staff Team

Barbara Booton	Project Management
Jo Ritson	Senior Advocate
John Ward	Advocate
Angela Burman	PA Support Worker
Fiona Martin	Advocate / Development Worker

Looking Ahead

Some of our priorities for 2021-2022 are:

- ❖ Secure funding and/or contracts to deliver our services including our advocacy and comprehensive PA recruitment and direct payments support.
 - ❖ Review and update our Being A Good Employer – Part 2 online programme
 - ❖ Implement Charity Log (new case recording system)
 - ❖ Support ongoing rollout of the vaccination and booster programme.
-

Company registration number: 07942039
Charity registration number: 1148975

Active Independence

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 March 2022

Campbell & Stenton Accountancy
The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Contents

Reference and Administrative Details	1
Independent examiner's report	2
Statement of financial activities	3
Balance Sheet	4
Notes to the financial statements	5 to 9

The following pages do not form part of the statutory financial statements:

Statement of financial activities per fund	10 to 11
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Active Independence
Reference and Administrative Details

Charity name	Active Independence
Charity registration number	1148975
Company registration number	7942039
Principal office	20 Winterset Drive Doncaster South Yorkshire DN4 5PT
Registered office	The Old Barn, Anchorage Lane Sprotbrough Doncaster DN5 8DT
Secretary	Barbara Booton (Appointed 19 October 2016)
Trustees	David Alan Turner-Smith (Appointed 14 March 2017) Jo Ritson (Appointed 19 October 2016) Kerrie Evans (Appointed 14 March 2017) Naveen Judah (Appointed 21 March 2018)
Accountant	Campbell & Stenton Accountancy The Old Barn Anchorage Lane Sprotbrough Doncaster DN5 8DT

Independent Examiner's Report to the Trustees of Active Independence

I report on the accounts of the company for the year ended 31 March 2022, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

20 December 2022

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Statement of Financial Activities (including Income and Expenditure Account) for the Year Ended 31 March 2022

		Unrestricted Funds	Restricted Funds	Total Funds Year ended 31 March 2022	Total Funds Period ended 31 March 2021
	Note	£	£	£	£
Incoming resources					
Incoming resources from generated funds					
Voluntary Income	2	17,988	34,315	52,303	84,585
Other incoming resources	4	1,582	31,000	32,582	9,090
Total incoming resources		<u>19,570</u>	<u>65,315</u>	<u>84,885</u>	<u>93,675</u>
Resources expended					
Costs of generating funds					
Costs of generating voluntary income	5	-	-	-	-
Fundraising trading: cost of goods sold and other costs	5	6,359	67,426	73,785	69,380
Total resources expended		<u>6,359</u>	<u>67,426</u>	<u>73,785</u>	<u>69,380</u>
Net movements in funds		13,211	(2,111)	11,100	24,295
Reconciliation of funds					
Total funds brought forward		<u>45,576</u>	<u>21,194</u>	<u>66,770</u>	<u>42,475</u>
Total funds carried forward		<u><u>58,787</u></u>	<u><u>19,083</u></u>	<u><u>77,870</u></u>	<u><u>66,770</u></u>

All incoming resources and resources expended derive from continuing activities

Active Independence (Registration number: 07942039)

Balance Sheet as at 31 March 2022

		31 March 2022		31 March 2021	
	Note	£	£	£	£
Fixed Assets					
Tangible assets	9		1,205		1,479
Current assets					
Cash at bank and in hand			78,972	66,050	
Creditors: Amounts falling due within one year	10	(2,307)		(759)	
Net current assets			(2,307)		65,291
Net assets			<u>77,870</u>		<u>66,770</u>
The funds of the charity:					
Restricted funds			19,083		21,194
Unrestricted funds					
Unrestricted income funds			58,787		45,576
Total charity funds			<u>77,870</u>		<u>66,770</u>

For the financial year ended 31 March 2022, the charity was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the charity to obtain an audit of its accounts for the period in question in accordance with section 476.

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

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

Approved by the Board on 20 December 2022 and signed on its behalf by:

.....

Barbara Booton
Secretary

The notes on pages 5 to 9 form an integral part of these financial statements.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2022

1 Accounting policies

Basis of preparation

The financial statements have been prepared under the historical cost convention and in accordance with the Statement of Recommended Practice 'Accounting and Reporting by Charities (SORP 2005)', issued in March 2005, applicable accounting standards and the Companies Act 2006. The financial statements have been prepared on a cash basis.

Fund accounting policy

Unrestricted income funds are general funds that are available for use at the trustees' discretion in furtherance of the objectives of the charity.

Restricted funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Further details of each fund are disclosed in note 13.

Incoming resources

Voluntary income including donations and grants that provide core funding or are of a general nature is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Resources expended

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

Costs of generating funds comprise the costs associated with attracting voluntary income and the costs of trading for fundraising purposes.

Fixed assets

Individual fixed assets costing £0 or more are initially recorded at cost.

Depreciation

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Office equipment	33% reducing balance
------------------	----------------------

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2022

2 Voluntary income

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2022 £	Total Funds Period ended 31 March 2021 £
Donations and Legacies				
Donations	118	-	118	285
Grants				
Grants	17,870	34,315	52,185	84,300
	17,988	34,315	52,303	84,585

3 Grants receivable

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2022 £	Total Funds Period ended 31 March 2021 £
Grants	17,870	34,315	52,185	84,300

4 Other incoming resources

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2022 £	Total Funds Period ended 31 March 2021 £
Other income				
Managed services Income	-	-	-	-
Other income	1,582	31,000	32,582	9,090
	1,582	31,000	32,582	9,090

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2022

5 Total resources expended

	Grants	Operating activity	Total
	£	£	£
Direct Costs			
Other direct costs		618	618
Employment costs	-	67,997	67,997
Establishment costs	-	120	120
Insurance	-	466	466
Advertising	-	-	0
Printing, posting and stationary	-	1,190	1,190
Subscriptions and donations	-	52	52
Sundry and other costs	-	1,686	1,686
Accountancy fees	-	1,016	1,016
Bank charges & interest		47	47
Depreciation of tangible fixed assets	-	593	593
	0	73,785	73,785

6 Trustees' remuneration and expenses

No trustees received any remuneration during the period

7 Net (Expenditure)/income

Net (Expenditure)/income is stated after charging

	Year ended 31 March 2022 £	Period ended 31 March 2021 £
Depreciation of owned assets	593	726

8 Taxation

The company is a registered charity and is, therefore, exempt from taxation

Active Independence

Notes to the Financial Statement for the Year Ended 31 March 2022

9 Tangible fixed assets

	Fixtures, fittings and equipment £
Cost	
As at 1 April 2021	3154
Additions	319
At 31 March 2022	<u>3473</u>
Depreciation	
As at 1 April 2021	1675
Charge for the period	593
As at 31 March 2022	<u><u>2268</u></u>
Net book value	
As at 31 March 2022	<u><u>1205</u></u>
As at 31 March 2021	<u><u>1479</u></u>

10 Creditors: Amounts falling due within one year

	31 March 2022 £	31 March 2021 £
Accruals and deferred income	778	797

11 Members' liability

The charity is a private company limited by guarantee and consequently does not have share capital. Each of the members is liable to contribute an amount not exceeding £nil towards the assets of the charity in the event of liquidation.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2022

12 Related parties

Controlling entity

The charity is controlled by the trustees who are all directors of the company

13 Analysis of funds

	At 1 April 2021	Incoming resources	Resources expended	At 31 March 2022
	£	£	£	£
General Funds				
Unrestricted income fund	45,576	19,570	6,359	58,787
Restricted Funds				
Restricted income fund	21,194	65,315	67,426	19,083
	<u>66,770</u>	<u>84,885</u>	<u>73,785</u>	<u>77,870</u>

14 Net assets by fund

	Unrestricted Funds	Restricted Funds	Total Funds 31 March 2022	Total Funds 31 March 2021
	£	£	£	£
Tangible assets	1,205	-	1,205	1,479
Current assets	59,889	19,083	78,972	66,050
Creditors: Amounts falling due within one year	(2,307)	-	(2,307)	(759)
Net assets	<u>58,787</u>	<u>19,083</u>	<u>77,870</u>	<u>66,770</u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2022

	Unrestricted income fund 2022 £	Unrestricted income fund 2021 £
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	17,988	-
Other incoming resources	1,582	9,090
Total incoming resources	19,570	9,090
Resources expended		
Costs of generating funds		
Fundraising trading: cost of goods sold and other costs	6,359	2,580
Total resources expended	6,359	2,580
Net movements in funds	13,211	6,510
Reconciliation of funds		
Total funds brought forward	45,576	39,066
Total funds carried forward	58,787	45,576

Active Independence
Statement of financial activities by fund Year Ended 31 March 2022

..... continued

	Restricted income fund 2022 £	Restricted income fund 2021 £
Incoming resources		
Incoming resources from generated funds		
Voluntary income	34,315	84,585
Other incoming resources	31,000	-
Total incoming resources	<u>65,315</u>	<u>84,585</u>
Resources expended		
Costs of generating funds		
Costs of generating voluntary income	-	-
Fundraising trading: costs of goods sold and other costs	67,426	66,800
Total resources expended	<u>67,426</u>	<u>66,800</u>
Net movements in funds	(2,111)	17,785
Reconciliation of funds		
Total funds brought forward	<u>21,194</u>	<u>3,409</u>
Total funds carried forward	<u><u>19,083</u></u>	<u><u>21,194</u></u>

This page does not form part of the statutory financial statements.

Independent Examiner's Report to the Trustees of

Active Independence

I report on the accounts of the company for the year ended 31 March 2022, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

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 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charitieshave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

20 December 2022

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

ACTIVE INDEPENDENCE

England & Wales - Charity number 1148975

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 1	Month April	Year 2020		Day 31 st	Month March	Year 2021

Section A Reference and administration details

Charity name

Active Independence

Other names charity is known by

Registered charity number (if any)

1148975

Charity's principal address

C/o Unit 37, Moorgate Crofts Business Centre

South Grove

Rotherham

Postcode

S60 2DH

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Jo Ritson			
2	David Turner Smith	Treasurer		
3	Barbara Booton	Secretary		
4	Kerrie Evans			
5	Naveen Judah	Chair		
6	Brian Nelson			
7	Jacqueline Clayton		1/1/20	
8	Mohammed Ramzan		1/1/20	
9	Eleanor Dabell		1/1/20	
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Memoranda and Articles
How the charity is constituted (eg. trust, association, company)	Registered charity and company limited by guarantee
Trustee selection methods (eg. appointed by, elected by)	Elected by members

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

The day to day running of the charity is managed by the trustees. During the pandemic they have not been able to meet in person but governed the charity by email and virtual meetings .

he wider membership are kept regularly informed of plans, relevant information and services by a monthly e-bulletins, the charities Facebook and Twitter accounts and through the website.

In July 2020 all policies were reviewed and updated and adopted by trustees.

New electronic handbooks were written for trustees, staff, freelance Workers and any potential volunteers

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

1. To provide information, advice, advocacy, training and support to enable Disabled people to have choice and control, and to live independent lives.
2. To raise aspirations and confidence amongst Disabled people, families and carers to facilitate choice, control and independent living.
3. To campaign for the right for Disabled people to have choice and control, in order to live independently and with dignity.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Trustees have had regard to the guidance on public benefit and carried out the following activities:

1. delivery of all services continued without a break despite the challenges of the pandemic. Staff are familiar with homeworking to take on additional capacity.
2. Delivery of 'Active Advocacy' providing peer advocacy to Disabled people and their families . Support is provided in people's own homes with trained advocates. During periods of lockdown and Covid measures, support to clients continued remotely/socially distanced when possible
3. development of the new service "Active solutions" in partnership with age UK and Crossroads Care Rotherham continued – in fact work through the pandemic provided increased evidence of proof of concept
4. concern for individual Disabled people's well being prompted us to develop craft packs which could be posted to people's homes for them to complete on their own or with support via video or phone call
5. We have continued to provide support information and advice to those who employ their own carers support staff and to the PAs who provided. Demand for this service was very intense at the beginning of the pandemic and during the rollout of the vaccinations
6. We have promoted the right to an independent life with choice and control through working in partnership with service providers to transform their service delivery. We have also supported individuals to utilise appropriate complaints and resolution procedures when necessary.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

All active independence services and activities are considerably enhanced by the contribution of volunteers. Some of these are disabled people and carers who have been helped by active independence and since become active volunteers themselves. Other volunteers are nondisabled professionals and workers contributing their expertise and knowledge on an unpaid basis, particularly around finances and information technology.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

1. Governance

- continue to stabilise the governance of the charity with our New chair. The remaining trustees ensure continuity.

2. Activities

Section D

Achievements and performance

In carrying out the objectives of our organisation we undertook a range of activities:

Events and promotional activities

It is important we keep in touch with our wider membership and we have done this through: (events being all cancelled)

- Regular E bulletins
- communicating through our website as well as our Twitter (@active_ind) and Facebook accounts

Projects

- Development of RMBC pre-front door service "Active Solutions"
- Art of Well-Being – a programme of radical craft sessions for disabled people, their carers and families – no delivered remotely with packs sent through the post

Services

Our primary service is "Active Advocacy". This is funded through a 12 months through the VAR Social Prescribing Service – we also secured a 2nd grant funding from the HBJ trust fund for clients not covered by social prescribing. Also received 2 emergency Covid-19 grants

- Secured **£380,000** in welfare entitlements
- Supported service users on a range of issues related to independent living including: welfare benefits; Personal health Budgets; CHC assessments; housing; employment issues; community care assessment; stroke support; equipment; recruitment and retention issues
- supported over 300 PAs through the vaccine process

PA Support Service – Continued contract with DMBC to deliver this innovative and ground-breaking service. It offers confidential 1-1 support and guidance for PAs and monthly newsletters.

Direct payments support service

PA recruitment – utilising the re-built website to promote PAs to register their profile and employers to advertise vacancies.

Section E

Financial review

Brief statement of the charity's policy on reserves

We have a reserves policy in which we have established the level of reserves that is prudent for **Active Independence** to have..

To date we have managed to considerably increase our reserves due to the introduction of QuickBooks enabling us to identify and close several funding streams

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Our main source of funding is grant funding and small contracts to deliver projects such as that from Voluntary Action Rotherham; DMBC and grant funding from the HBJ trust. We are beginning to attract small donations which contribute to our general funds. This financial year we have the additional benefit of 2X emergency Covid related grants

Section F

Other optional information

--

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Barbara Booton	
Position (eg Secretary, Chair, etc)	Secretary	
Date	24/1/22	

Company registration number: 07942039
Charity registration number: 1148975

Active Independence

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 March 2021

Campbell & Stenton Accountancy
The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Contents

Reference and Administrative Details	1
Independent examiner's report	2
Statement of financial activities	3
Balance Sheet	4
Notes to the financial statements	5 to 9

The following pages do not form part of the statutory financial statements:

Statement of financial activities per fund	10 to 11
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Active Independence
Reference and Administrative Details

Charity name	Active Independence
Charity registration number	1148975
Company registration number	7942039
Principal office	20 Winterset Drive Doncaster South Yorkshire DN4 5PT
Registered office	The Old Barn, Anchorage Lane Sprotbrough Doncaster DN5 8DT
Secretary	Barbara Booton (Appointed 19 October 2016)
Trustees	David Alan Turner-Smith (Appointed 14 March 2017) Jo Ritson (Appointed 19 October 2016) Kerrie Evans (Appointed 14 March 2017) Naveen Judah (Appointed 21 March 2018)
Accountant	Campbell & Stenton Accountancy The Old Barn Anchorage Lane Sprotbrough Doncaster DN5 8DT

Independent Examiner's Report to the Trustees of Active Independence

I report on the accounts of the company for the year ended 31 March 2021, which are set out on pages 3 to 9.

Respective responsibilities of trustees and examiner

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act ;
- follow the procedures laid down in the General Directions given by the Charity Commission under section 145 (5) (b) of the 2011 Act ; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

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- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

.....
Campbell & Stenton Accountancy

25 February 2022

The Old Barn
Anchorage Lane
Sprotbrough
Doncaster
DN5 8DT

Active Independence

Statement of Financial Activities (including Income and Expenditure Account) for the Year Ended 31 March 2021

		Unrestricted Funds	Restricted Funds	Total Funds Year ended 31 March 2021	Total Funds Period ended 31 March 2020
	Note	£	£	£	£
Incoming resources					
Incoming resources from generated funds					
Voluntary Income	2	-	84,585	84,585	53,487
Other incoming resources	4	9,090	-	9,090	9,337
Total incoming resources		<u>9,090</u>	<u>84,585</u>	<u>93,675</u>	<u>62,824</u>
Resources expended					
Costs of generating funds					
Costs of generating voluntary income					
	5	-	-	-	-
Fundraising trading: cost of goods sold and other costs	5	2,580	66,800	69,380	76,204
Total resources expended		<u>2,580</u>	<u>66,800</u>	<u>69,380</u>	<u>76,204</u>
Net movements in funds		6,510	17,785	24,295	(13,380)
Reconciliation of funds					
Total funds brought forward		39,066	3,409	42,475	55,855
Total funds carried forward		<u>45,576</u>	<u>21,194</u>	<u>66,770</u>	<u>42,475</u>

All incoming resources and resources expended derive from continuing activities

Active Independence (Registration number: 07942039)

Balance Sheet as at 31 March 2021

		31 March 2021		31 March 2020	
	Note	£	£	£	£
Fixed Assets					
Tangible assets	9		1,479		610
Current assets					
Cash at bank and in hand			66,050	42,319	
Creditors: Amounts falling due within one year	10	(759)		(454)	
Net current assets			(759)		41,865
Net assets			66,770		42,475

The funds of the charity:

Restricted funds		21,194	3,409
Unrestricted funds			
Unrestricted income funds		45,576	39,066
Total charity funds		66,770	42,475

For the financial year ended 31 March 2020, the charity was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the charity to obtain an audit of its accounts for the period in question in accordance with section 476.

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

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

Approved by the Board on 25 February 2022 and signed on its behalf by:

.....
Barbara Booton
Secretary

The notes on pages 5 to 9 form an integral part of these financial statements.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2021

1 Accounting policies

Basis of preparation

The financial statements have been prepared under the historical cost convention and in accordance with the Statement of Recommended Practice 'Accounting and Reporting by Charities (SORP 2005)', issued in March 2005, applicable accounting standards and the Companies Act 2006. The financial statements have been prepared on a cash basis.

Fund accounting policy

Unrestricted income funds are general funds that are available for use at the trustees' discretion in furtherance of the objectives of the charity.

Restricted funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Further details of each fund are disclosed in note 13.

Incoming resources

Voluntary income including donations and grants that provide core funding or are of a general nature is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Resources expended

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

Costs of generating funds comprise the costs associated with attracting voluntary income and the costs of trading for fundraising purposes.

Fixed assets

Individual fixed assets costing £0 or more are initially recorded at cost.

Depreciation

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Office equipment	33% reducing balance
------------------	----------------------

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2021

2 Voluntary income

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2021 £	Total Funds Period ended 31 March 2020 £
Donations and Legacies				
Donations	-	285	285	1,485
Grants				
Grants	-	84,300	84,300	52,002
	-	84,585	84,585	53,487

3 Grants receivable

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2021 £	Total Funds Period ended 31 March 2020 £
Grants	-	84,300	84,300	52,002

4 Other incoming resources

	Unrestricted Funds £	Restricted Funds £	Total Funds Year ended 31 March 2021 £	Total Funds Period ended 31 March 2020 £
Other income				
Managed services Income	-	-	-	-
Other income	9,090	-	9,090	9,337
	9,090	0	9,090	9,337

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2021

5 Total resources expended

	Grants	Operating activity	Total
	£	£	£
Direct Costs			
Other direct costs		13,200	13,200
Employment costs	-	46,507	46,507
Establishment costs	-	-	0
Insurance	-	501	501
Advertising	-	-	0
Printing, posting and stationary	-	1,709	1,709
Subscriptions and donations	-	52	52
Sundry and other costs	-	5,740	5,740
Accountancy fees	-	944	944
Depreciation of tangible fixed assets	-	726	726
	0	69,379	69,379
	0	69,379	69,379

6 Trustees' remuneration and expenses

No trustees received any remuneration during the period

7 Net (Expenditure)/income

Net (Expenditure)/income is stated after charging

	Year ended 31 March 2021 £	Period ended 31 March 2020 £
Depreciation of owned assets	726	302
	726	302

8 Taxation

The company is a registered charity and is, therefore, exempt from taxation

Active Independence

Notes to the Financial Statement for the Year Ended 31 March 2021

9 Tangible fixed assets

	Fixtures, fittings and equipment £
Cost	
As at 1 April 2020	1559
Additions	1595
At 31 March 2021	<u>3154</u>
Depreciation	
As at 1 April 2020	949
Charge for the period	726
As at 31 March 2021	<u>1675</u>
Net book value	
As at 31 March 2021	<u>1479</u>
As at 31 March 2020	<u>610</u>

10 Creditors: Amounts falling due within one year

	31 March 2021 £	31 March 2020 £
Accruals and deferred income	<u>797</u>	<u>454</u>

11 Members' liability

The charity is a private company limited by guarantee and consequently does not have share capital. Each of the members is liable to contribute an amount not exceeding £nil towards the assets of the charity in the event of liquidation.

Active Independence

Notes to the Financial Statements for the Year Ended 31 March 2021

12 Related parties

Controlling entity

The charity is controlled by the trustees who are all directors of the company

13 Analysis of funds

	At 1 April 2020	Incoming resources	Resources expended	At 31 March 2021
	£	£	£	£
General Funds				
Unrestricted income fund	39,066	9,090	2,580	45,576
Restricted Funds				
Restricted income fund	3,409	84,585	66,800	21,194
	<u>42,475</u>	<u>93,675</u>	<u>69,380</u>	<u>66,770</u>

14 Net assets by fund

	Unrestricted Funds	Restricted Funds	Total Funds 31 March 2021	Total Funds 31 March 2020
	£	£	£	£
Tangible assets	1,479	-	1,479	610
Current assets	44,856	21,194	66,050	42,319
Creditors: Amounts falling due within one year	(759)	-	(759)	(454)
Net assets	<u>45,576</u>	<u>21,194</u>	<u>66,770</u>	<u>42,475</u>

Active Independence

Statement of financial activities by fund Year Ended 31 March 2021

	Unrestricted income fund 2021 £	Unrestricted income fund 2020 £
Incoming resources		
Incoming resources from generated funds		
Voluntary Income	-	105
Other incoming resources	9,090	9,337
Total incoming resources	<u>9,090</u>	<u>9,442</u>
Resources expended		
Costs of generating funds		
Fundraising trading: cost of goods sold and other costs	2,580	3,222
Total resources expended	<u>2,580</u>	<u>3,222</u>
Net movements in funds	6,510	6,220
Reconciliation of funds		
Total funds brought forward	39,066	32,846
Total funds carried forward	<u><u>45,576</u></u>	<u><u>39,066</u></u>

Active Independence
Statement of financial activities by fund Year Ended 31 March 2021

..... continued

	Restricted income fund 2021 £	Restricted income fund 2020 £
Incoming resources		
Incoming resources from generated funds		
Voluntary income	84,585	53,382
Other incoming resources	-	-
Total incoming resources	<u>84,585</u>	<u>53,382</u>
Resources expended		
Costs of generating funds		
Costs of generating voluntary income	-	-
Fundraising trading: costs of goods sold and other costs	66,800	72,982
Total resources expended	<u>66,800</u>	<u>72,982</u>
Net movements in funds	17,785	(19,600)
Reconciliation of funds		
Total funds brought forward	3,409	23,009
Total funds carried forward	<u>21,194</u>	<u>3,409</u>

This page does not form part of the statutory financial statements.

Signed By

BARBARA BOOTON

Date Signed	Wed, 02 Mar 2022 15:04:50 +0000
Name	Barbara Booton
Email	info@activeindependence.org
Printed Name	BARBARA BOOTON
IP Address	92.5.181.126
Browser User Agent	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/98.0.4758.102 Safari/537.36

Independent Examiner's Report to the Trustees of

Active Independence

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Campbell & Stenton Accountancy

25 February 2022

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