



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

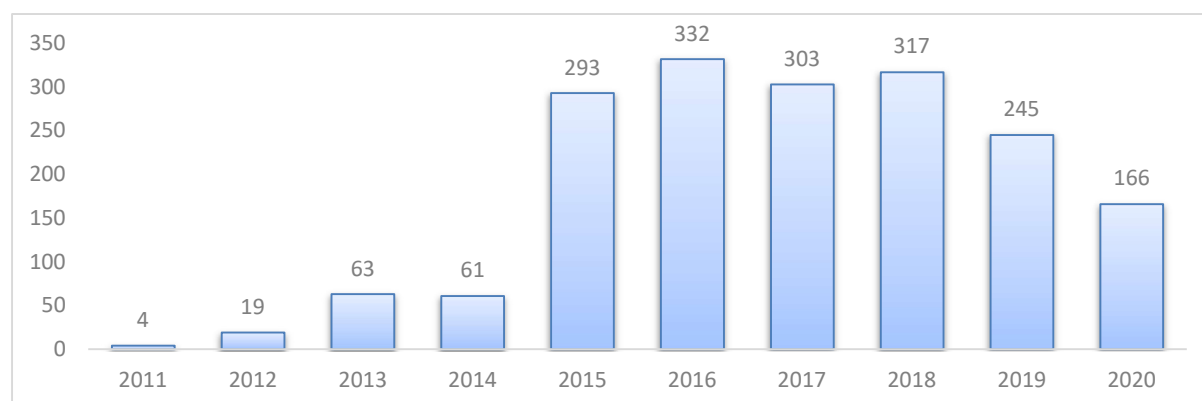
Advocacy

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



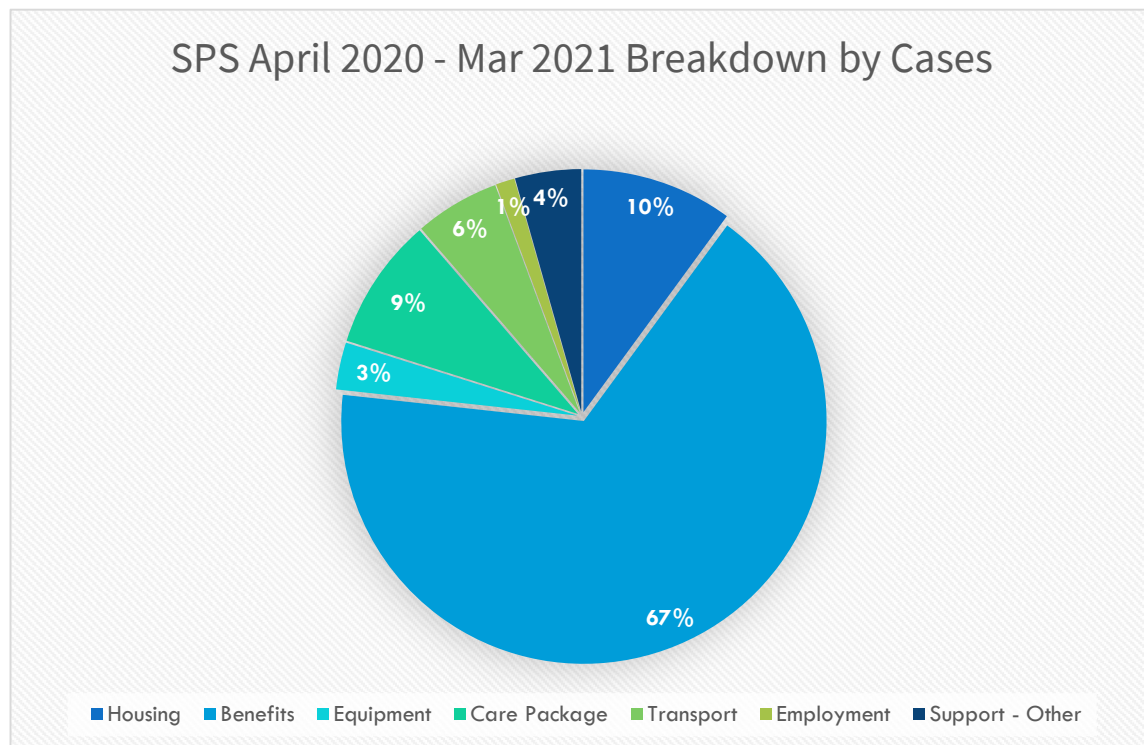
Inevitably, there was a dramatic decrease in referrals this year as people isolated and shielded such that. We did, however, continue to provide advocacy support throughout via telephone and, when appropriate, home visiting (taking all necessary precautions).

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

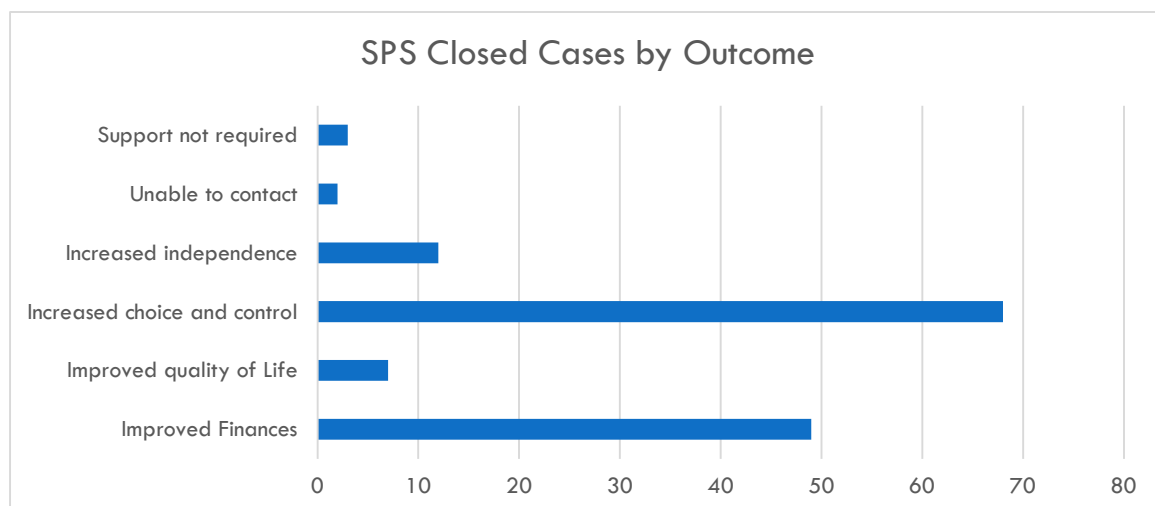
The following pie charts show the main issue of support we often clients. Something they came with one issue but as we work with them, we come across other areas they need support with



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.

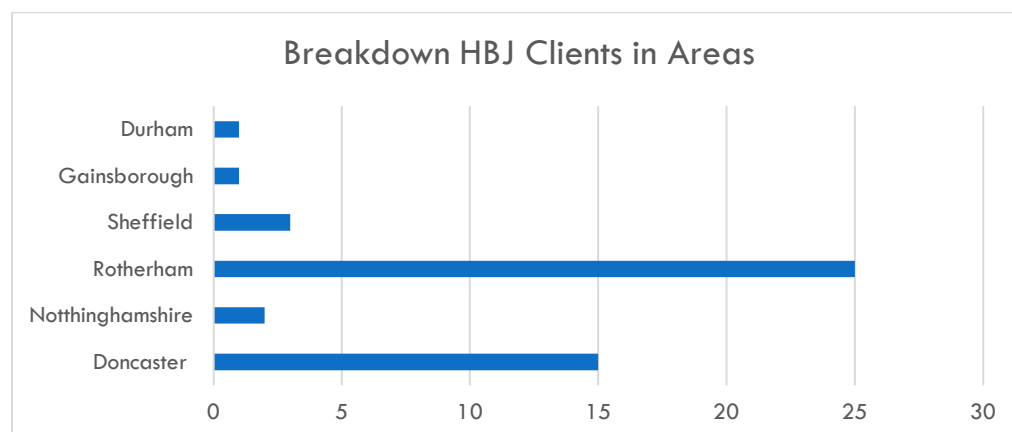
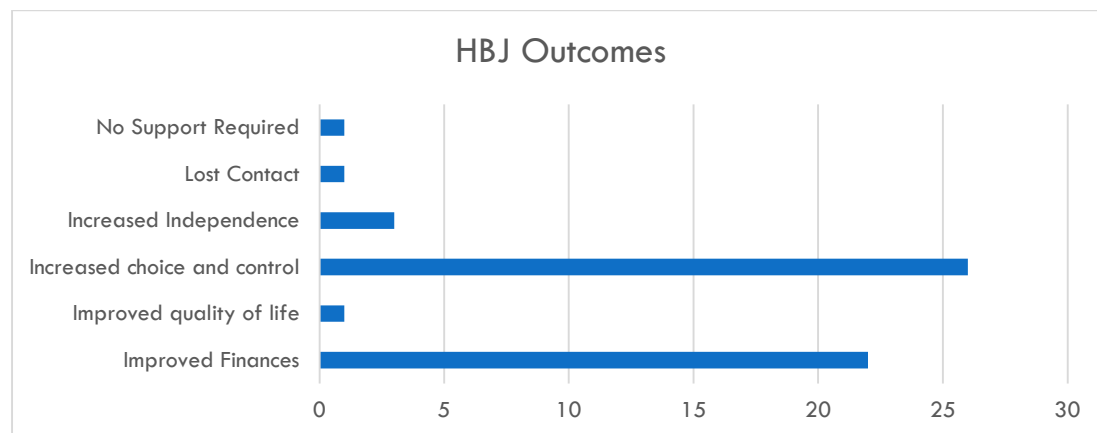
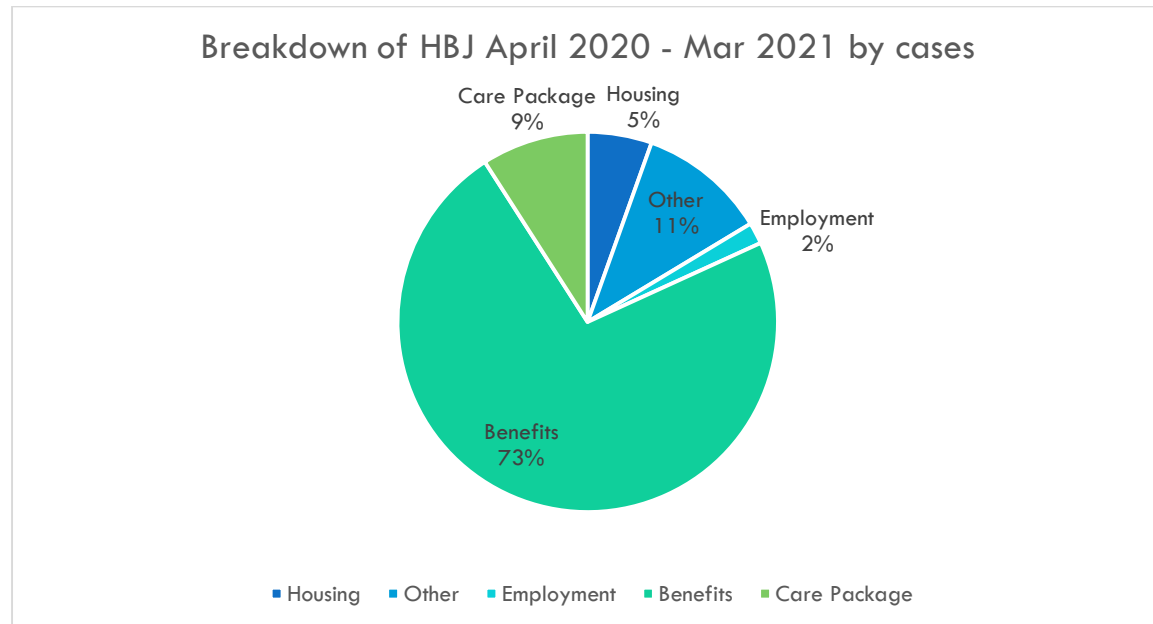
Outcomes

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

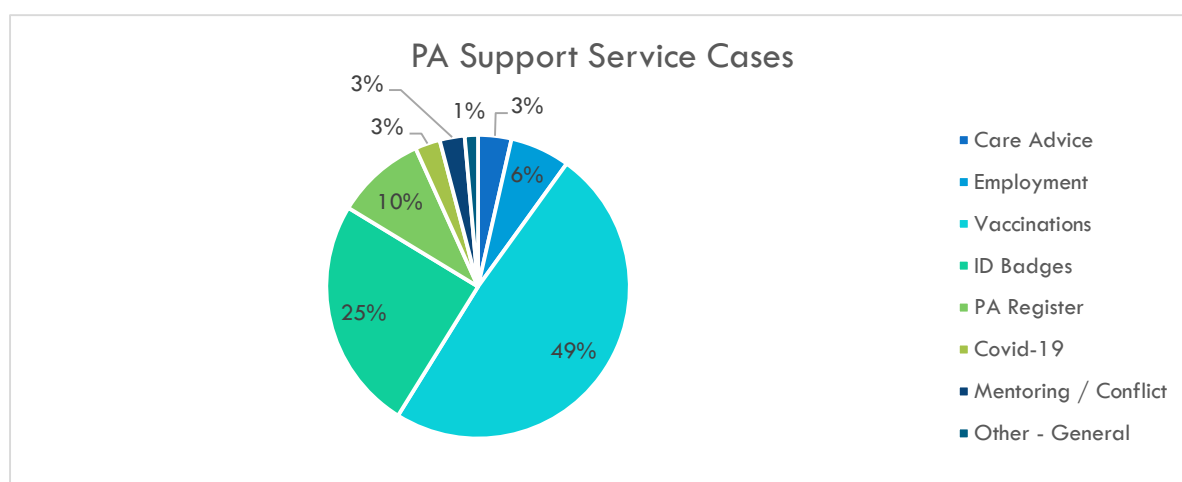
- PIP – Personal Independence Payment
- ESA – Employment & Support Allowance

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

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Reference and Administrative Details	1
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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
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
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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>

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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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Campbell & Stenton Accountancy

20 December 2022

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