

# **Disability Partnership Calderdale**

Charity number 1155007

## **Annual Report and Financial Statements**

**for the year ended 31 March 2023**



# **Disability Partnership Calderdale**

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**Prepared by West Yorkshire Community Accountancy Service CIO**

# **Disability Partnership Calderdale**

## **Trustees' report for the year ended 31 March 2023**

### **Reference and administrative details of the charity, its trustees and advisors**

The trustees during the financial year and up to and including the date the report was approved were:

<b>Name</b>	<b>Position</b>
Marion Spruce	Chair
Malcolm Kielty MBE	Secretary
Geraldine Rushton	Treasurer
Rosie Anne Orford	
David Ashton	
Shabir Hussain	
Donna Lorraine Turner	
George Brian Sutcliffe	

**Charity number** 1155007 Registered in England and Wales

<b>Registered and principal address</b>	<b>Bankers</b>
Resource Centre	The Co-operative Bank PLC
8b Hall Street	1 Balloon Street
Halifax	Manchester
HX7 5AY	M60 4EP

### **Independent examiner**

Sarah Coates MAAT

### **West Yorkshire Community Accountancy Service CIO**

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW

### **Structure, governance and management**

The charity is a Charitable Incorporated Organisation (CIO) formed on 13 December 2013 and is governed by a constitution. This was amended on 26 July 2022.

### **Method of recruitment and appointment of trustees**

The trustees of the charity are appointed by the members at the AGM.

# **Disability Partnership Calderdale**

## **Trustees' report (continued) for the year ended 31 March 2023**

### **Objectives and activities**

#### **The charity's objects**

The charity's objects are to relieve the needs of disabled people, for the public benefit, in Calderdale to enable them to live as independently as possible by:-

- a) Working in partnership with commissioners and service providers to raise awareness of issues of concern to disabled people, so that commissioners and service providers can make improvements to maximise access to mainstream and specialist services for people with physical and sensory impairments;
- b) Raising the profile of disabled people in Calderdale;
- c) Developing the CIO as an independent user led organisation (ULO) of adults who are interested in working together to support change for disabled people who live and/or work in Calderdale and have physical and/or sensory impairments;
- d) Delivering services and organising and facilitating events involving disabled people, to make the long term future of the CIO more secure;
- e) Holding regular meetings which look at issues in detail, where the membership works together in partnership with numerous commissioners and service providers to identify barriers faced by disabled people and improve service design and delivery so that disabled people have better access, experiences, improved wellbeing and quality of life;
- f) Ensuring that disabled people are fully informed about policy changes that may affect their lives;
- g) Empowering disabled people to take control of their lives and have greater confidence, choice, control and a louder voice over the way their needs are met so they can influence service improvement;
- h) Ensuring that disabled people have greater access to housing, health, education, employment, leisure, and transport opportunities and can participate in family and community life.

#### **The charity's main activities**

We are an organisation of disabled people, led by disabled people. Our members are disabled people, mostly with physical and/or sensory impairments. Nine of our ten Trustees are disabled people. Our Trustees meet monthly and they are very involved, committed and fully informed.

We operate at the heart of a partnership of Disabled Peoples' organisations in Calderdale. We are at the 'hub' of a Disability Partnership, and act as a key conduit between service providers and commissioners, and the people living with disabilities who use those services. We provide information, signposting, engagement and consultation as a two-way process between both the statutory, voluntary and private sectors and disabled people, and know that we are best placed to deliver our work. By involving disabled people in this way, we aim to achieve the removal of barriers to access, and improvements to services for the benefit of disabled people.

#### **Public benefit statement**

In setting our objectives and planning our activities our Trustees have given serious consideration to the Charity Commission's general guidance on public benefit and in particular to enable disabled people in Calderdale to live as independently as possible by working in partnership with service providers and commissioners to raise awareness of issues of concern to disabled people and to maximise access to mainstream and specialist services.

# **Disability Partnership Calderdale**

## **Trustees' report (continued) for the year ended 31 March 2023**

### **Achievements and performance**

Developing the work of Disability Partnership Calderdale, Project ID: 20183918 project year ended on 1st May 2023 Progress report.

### **Purpose of project:**

To increase visibility, profile and influence of DPC across Calderdale and Kirklees's VCS, Public and Private Sectors on behalf of the disabled community. This will be measured by the attached key performance indicators (KPIs) to impact the services the disabled community are aware of, informed about and how services are adapted to meet the needs of the community.

To measure the progress of our project to 1st May 2023 - year (1 of 2) we have, in the first instance, looked at the stated KPIs from the start of the project May 2022 to April 2023.

To increase number of members, both individuals and partner organisations in Calderdale and Kirklees, by taking DPC 'On the Road' and increase outreach work.

KPI = A 20% increase. An additional 100 members/ subscribers in Year 1 and in Year 2 = 200 in total by 2024. –

- Year one increase 119 (+ 27%)

Mail chimp sign-up – these are the numbers of subscribed mail chip email recipients, with growth as a percentage based on the number on 1 April 2022:

- April 1 2022: 428 contacts
- April 1 2023: 547 contacts an increase of 119 (+ 27%)

\* Latest figures show a continuing upward trend into year 2 1st May 2023 to July 27 2023: 652 contacts an increase of 224 (+ 52%) on April 2022

To ensure that our membership is represented by people from all Calderdale and Kirklees Localities and all 9 x 'Protected Characteristics' Groups.

KPI = A 10% increase in the Under 30's and South Asian members from 2022 to 2024

We are making good progress with engaging our local South Asian communities, however, turning our positive engagement into "membership" is, as expected, proving to be very challenging due to strong cultural barriers therefore we are classing membership as engagement / participation for the purpose of this KPI.

Under 30s "membership" engagement is also making good progress. We work along side partner organisations (e.g. Unique Ways) whose target groups are under 18s, as young people leave Unique Ways they are signposted to Disability Partnership Calderdale.

We also have close links with Halifax Panthers Wheelchair Rugby League team the vast majority of whom are under 30.

To engage with Disabled People to find out what their issues and concerns are, and put plans in place to address these issues, as far as is possible.

KPI = 100 individuals will have actively participated in engagement / consultation by Mar 2024

Our position as an organisation is to act as an information and advisory hub working with a wide range of partners and service users to make sure the widest possible engagement for our disabled communities. To this end we circulate information on consultations and how to engage with them, we do not always know the extent to which individuals respond. We do however "consult" with our members at every event we hold i.e. every open meeting averages 30 individuals. Other events attract large attendances.

- 20 December 2022 – Open Meeting: Christmas Party (100)
- 3 June 2022 Jubilee Garden Party video (70)

# **Disability Partnership Calderdale**

## **Trustees' report (continued) for the year ended 31 March 2023**

### **Achievements and performance (continued)**

Consultation information on behalf of partners

49 consultations posted on the website to date, since 1 April 2022. These are tracked by looking at the category "consultation" which is attached to any news item that involves a consultation. Issues covered include these (consultation article titles):

Policing & Safety Survey, Men's Health & Wellbeing Survey, Consultation: Bus Accessibility, Join The Council's Citizens' Panel, Consultation: Help develop a GCSE in BSL, Consultation: West Yorkshire Combined Authority's Rail Strategy, NHS's 75th Birthday – Have Your Say On The Future, Consultation: Text Message Real Time Bus Information, Yorkshire Water Event – Your water, your say!, Survey – Housing Support Services For Over-50s, End of life care survey from Healthwatch, Share Your Views On Real Time Bus Info Text Service, Consultation: Does public transport work for disabled people?, Halifax Regeneration – Have Your Say, National Highways Surveying Disabled Motorists, Consultation: Halifax Town Centre Development, Consultation: Calderdale Council's budget, Domestic Violence Support in Calderdale, Calderdale Climate Action Partnership Meeting – Disability Voice Wanted, The Calderdale Survey: 2023, Consultation: Calderdale and Huddersfield NHS Foundation Trust, Consultation: Shaping The Future of Disabled Care, Calderdale Housing Survey, Huddersfield Rail Station Consultation, Bradford Interchange Consultation, Participants needed for floods research project, Calderdale Climate Action Plan Consultation, Learning Disability and Autism Survey, Parasol Disability & Health Event, Help shape the future of pharmacy in England, Work at Halifax Station Set To Make Platform Access Step-Only, Deaf & Hard of Hearing Consultation, Report: How disabled people's voices can be prioritised in health and care services, West Yorkshire Bus Service Consultation, Request for "insights" from Calderdale wheelchair users, First 2021 Calderdale Census Data Out, National Disability Strategy Consultation, Hip Replacement Consultation, CQC's Hearing Impaired Care Survey, Personal Emergency Evacuation Plan Petition, Research Project: Improving flood recovery for disabled women, Petition: Make deaf awareness compulsory, Active Calderdale Survey, North Bridge and A58 flyover consultation, The RNIB Wants to Hear From You!, Active Calderdale Survey, Unique Ways Annual Survey, Consultation: Government SEND Green Paper.

Continue to provide Bi-Monthly Open Meetings.

KPI = Provide 12 Open Meetings between 2022-2024.

We continue to host Open Meetings on a minimum of a bi monthly basis.

The meetings are well attended and much appreciated by our members.

We invite guest speakers from organisations who can provide practical information, and often solutions to individual issues, to each meeting. We try and vary the themes of presentations and invite members to request organisations from particular sectors that are topical. All our open meetings are recorded with copies available to members and wider stakeholders.

7 meetings held in year 1

2023

- 25 April - open Meeting
- 28 February - Open Meeting

2022

- 20 December – Open Meeting: Christmas Party (100)
- 22 November - Open Meeting: AGM
- 22 October - Open Meeting: Elections & exercise.
- 23 August - Open Meeting: Video: NHS Summer Messages
- 28 June - Open Meeting: Fire Safety Video / Meet Malcolm Kielty Video

# **Disability Partnership Calderdale**

## **Trustees' report (continued) for the year ended 31 March 2023**

### **Achievements and performance (continued)**

To ensure the DPC website is continually refreshed and provides up to date information, including a 'Directory of Services' for Disabled People in Calderdale and Kirklees.

KPI = Publish 10 news items every week, 1040 items from 2022-2024.

We are on target (slightly ahead) on this KPI with 596 news items published year 1 (57% of target)

- Year 1: April 1 2022– March 31 2023: 596 news items
- Year 2: April 1 2023 – to date: 177 news items
- Total of 773 news items since 1 April 2022.

Continue to publish a weekly newsletter, to be sent via post and email, and continue to be the 'Go-To' source of information for Calderdale's Disabled Community. Grow this provision organically as we expand into Kirklees.

KPI = 20% increase in subscribers, 100 in Year 1 and 100 in Year 2 = 200 in total from 2022-2024.

We are making good progress here with an increase of 119 in year 1

Mail chimp sign-up – these are the numbers of subscribed mail chip email recipients, with growth as a percentage based on the number on 1 April 2022:

- April 1 2022: 428 contacts
- April 1 2023: 547 contacts an increase of 119 (+ 27%)

Plan & deliver events – E.G Queens Jubilee Street Party, Christmas Party, Lunch Clubs and others.

KPI = Provide 8 events between 2022-2024 with a total attendance of at least 300 people.

- Year 1 - 2 events 170 attendees
- Year 2 to date 3 events 75 attendees

Whilst early 2022 still had a hangover from Covid 19 in that a number of people were still somewhat hesitant to "come out" for social gatherings we feel that there is a "normality" returning and we have a number of events planned (some already completed since start of May 2023) which put us well on course for meeting and exceeding our KPI target.

### **2022**

- 20 December – Christmas Party (100)
- 3 June Jubilee Garden Party video (70)

Create an 'Income generation and self- sustaining strategy', that will address ways for DPC to become more financially independent and less dependent on National Lottery Funding (E.G, charging for services, creation of advertorial magazine, partnership bids for individual projects).

This process has begun with a number of internal Stakeholder discussions as well as external partner/ Stakeholder meetings.

We have received a small amount of funding to help produce a "hard copy" bi monthly Magazine which we will publish and use to attract advertising, editorial and advertorial income.

We are also developing a Podcast which again will fulfil our objectives of communication with our communities and stakeholders and attract potential commercial support.

Partnership work with other like minded Charities to maximise our outcomes and commercial/ grant funding income.

We continue to position ourselves to be able to charge for advisory services e.g., accessibility audits for public and private organisations.

We are looking to other Local authority areas within the West Yorkshire Region to see if there is scope to extend our network which again helps attract more commercial / local grant income.

## **Disability Partnership Calderdale**

### **Trustees' report (continued) for the year ended 31 March 2023**

#### **Financial review**

The net receipts for the year was £1,978, including net receipts of £7,937 on unrestricted funds and net payments of £5,959 on restricted funds after transfers.

#### **Reserves policy**

The charity's free reserves, at the year end were £12,186.

The Board of Trustees have agreed that unrestricted funds should not fall below £1,000.

Approved by the board of trustees on 12/12/2023

Marion Spruce (Trustee)



## **Disability Partnership Calderdale**

### **Independent examiner's report to the trustees of Disability Partnership Calderdale**

I report to the charity trustees on my examination of the accounts of the CIO for the year ended 31 March 2023, which are set out on pages 9 to 12.

#### **Responsibilities and basis of report**

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

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

#### **Independent examiner's statement**

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

- 1 accounting records were not kept in respect of the charity as required by section 130 of the Charities Act;
- 2 the accounts do not accord with those records.

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

Sarah Coates MAAT

20/12/2023

#### **West Yorkshire Community Accountancy Service CIO**

Stringer House  
34 Lupton Street  
Leeds  
LS10 2QW

**Disability Partnership Calderdale**  
**Receipts and payments account**  
**for the year ended 31 March 2023**

	Notes	2023 Unrestricted funds £	2023 Restricted funds £	2023 Total funds £	2022 Total funds £
<b>Receipts</b>					
Grants and donations	(2)	5,482	70,000	75,482	62,863
Fee income		6,161	-	6,161	6,361
<b>Total receipts</b>		<b>11,643</b>	<b>70,000</b>	<b>81,643</b>	<b>69,224</b>
<b>Payments</b>					
Venue hire		-	3,185	3,185	1,545
BSL interpreting service		-	2,291	2,291	814
Administration		37	10,273	10,310	9,429
Transport		-	1,706	1,706	433
Food		-	-	-	360
Independent examination		-	420	420	420
Website		-	4,620	4,620	5,500
Insurance		-	393	393	388
Translation services		-	-	-	1,006
Speech to text reporting		-	-	-	597
Development workers		-	29,266	29,266	38,517
Administration workers		36	20,609	20,645	17,045
Worker expenses		-	-	-	75
Equipment		-	395	395	1,089
Memberships and subscriptions		-	-	-	144
Productions costs		3,205	-	3,205	6,841
Bookkeeping		-	2,400	2,400	-
Training		-	645	645	-
Phone costs		-	184	184	-
<b>Total payments</b>		<b>3,278</b>	<b>76,387</b>	<b>79,665</b>	<b>84,203</b>
<b>Net receipts / (payments)</b>		<b>8,365</b>	<b>(6,387)</b>	<b>1,978</b>	<b>(14,979)</b>
<b>Transfers between funds</b>		<b>(428)</b>	<b>428</b>	<b>-</b>	<b>-</b>
<b>Net movement in funds</b>		<b>7,937</b>	<b>(5,959)</b>	<b>1,978</b>	<b>(14,979)</b>
<b>Fund balances brought forward</b>		<b>4,249</b>	<b>10,887</b>	<b>15,136</b>	<b>30,115</b>
<b>Fund balances carried forward</b>	(3)	<b>12,186</b>	<b>4,928</b>	<b>17,114</b>	<b>15,136</b>

**Disability Partnership Calderdale**  
**Statement of assets and liabilities**  
**as at 31 March 2023**

	2023	2023	2023	2022
	Unrestricted	Restricted	Total	Total
	£	£	£	£
<b>Cash funds</b>				
Cash at bank	11,908	4,928	16,836	14,992
Cash in hand	278	-	278	144
<b>Total cash funds</b>	<u>12,186</u>	<u>4,928</u>	<u>17,114</u>	<u>15,136</u>

**Assets retained for the charity's own use**

Cupboard  
Four printers  
Two digital voice recorders  
One roller case  
Four laptops  
Diary and two penfriend pens and labels  
One conversor pro and two headsets  
Two tablets

**Liabilities**

	2023
	£
Accruals	<u>1,056</u>
	<u>1,056</u>

The financial statements were approved by the board of trustees on 12/12/2023

Marion Spruce (Trustee)

# **Disability Partnership Calderdale**

## **Notes to the accounts**

### **for the year ended 31 March 2023**

#### **1 Accounting policies**

##### **Basis of accounting**

The trustees have taken advantage of section 133 of the Charities Act 2011 and have prepared the accounts on a receipts and payments basis.

There has been no change to the accounting policies since last year.

No changes have been made to the accounts for previous years.

##### **Taxation**

As a charity the organisation benefits from rates relief and is generally exempt from income tax and capital gains tax but not from VAT. Irrecoverable VAT is included in the cost of those items to which it relates.

##### **Fund accounting**

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

Restricted funds are subjected to restrictions on their expenditure imposed by the donor or through the terms of an appeal.

Further explanation of the nature and purpose of each fund is included in the notes to the accounts.

**Disability Partnership Calderdale**  
**Notes to the accounts continued**  
**for the year ended 31 March 2023**

2 Grants and donations	2023 Unrestricted funds £	2023 Restricted funds £	2023 Total funds £	2022 Total funds £
National Lottery Community Fund (NLCF)	-	70,000	70,000	62,833
Community Foundation for Calderdale (CFFC)	-	-	-	-
West Yorkshire Police Commission	-	-	-	-
Donations	5,482	-	5,482	30
	<u>5,482</u>	<u>70,000</u>	<u>75,482</u>	<u>62,863</u>

3 Restricted funds	Balance b/f £	Incoming £	Outgoing £	Transfers £	Balance c/f £
NLCF	9,031	-	9,459	428	-
NLCF 22-24	-	70,000	66,928	-	3,072
Calderdale Met. Council	146	-	-	-	146
Freemasons	172	-	-	-	172
CFFC	1,099	-	-	-	1,099
West Yorkshire Police	439	-	-	-	439
	<u>10,887</u>	<u>70,000</u>	<u>76,387</u>	<u>428</u>	<u>4,928</u>

**Fund name**

NLCF

**Purpose of restriction**

To hold monthly accessible meetings, introduce new activities, plan for the future and be able to sustain and develop the organisation.

NLCF 22-24

Developing the work of Disability Partnership Calderdale

Calderdale Met. Council

For outreach work in the Park Ward area.

Freemasons

To purchase assistive equipment.

CFFC

Digital inclusion project for disabled people.

West Yorkshire Police

Hate incident/crime awareness videos with BSL, English and minority language subtitles

**4 Related party transactions**

**Trustee expenses**

No trustee received any expenses during this year or the previous year.

**Trustee remuneration and benefits**

No trustee received any remuneration or benefit during this or the previous year.