

Dog Assistance In Disability

Annual Report and Unaudited Accounts

for the year ending 31 March 2024

Charity Registration number 1178719

Registered Address

Early World House,
7 Darwin Court,
Clayton Way,
Oxon Business Park
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Shrewsbury
SY3 5AL

Bankers

CAF Bank Ltd	Lloyds Bank plc
25 Kings Hill Avenue	25 Gresham Street
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Independent Examiner

TCA (Shrewsbury) LLP
Third Floor
21 St Mary's Street
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Trustees' Report

The Trustees of Dog Assistance In Disability (Dog A.I.D.) are pleased to present their report and accounts for the year ended 31 March 2024.

Vision and mission

Our vision is that physically Disabled people throughout the UK will be supported to train their own pet dog as an Assistance Dog, helping them to become more independent.

Dog A.I.D.'s mission is to empower physically Disabled people to become more independent through training their own Assistance Dog in partnership with our skilled volunteer trainers.

Our Values

Openness, Fairness, Enablement, Respect, Excellence, Integrity

How we deliver our work

Dog A.I.D. supports physically Disabled people (our “clients”) to train their own pet dog to become an accredited Assistance Dog. We work in partnership with our U.K. wide network of professional dog trainers who generously volunteer their time and expertise to our charity. Volunteers are matched with a client and then coach them to train their own pet dog using positive, rewards-based techniques. The dog is trained to carry out tasks which will empower their owner to live more independently, working through three progressive levels of assessment before undertaking a public access test. This enables the client and their dog to access public spaces which permit Assistance Dogs.

Dog A.I.D. is a member of Assistance Dogs UK (ADUK), a coalition of charities that work to the highest international standards of Assistance Dog and guide dog training and welfare. Dog A.I.D is also accredited by Assistance Dogs International (ADI) within whose framework we work. This provides assurance that we are providing the highest standards of training and support to our clients and ensures the welfare of their dogs whilst they are training and working as an accredited Assistance Dog on our programme.

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Our activities in 2023/34

2023/24 has been a year of huge change within Dog A.I.D. as the charity focuses on putting in place the solid foundations needed for planned growth of our charity. Demand for Dog A.I.D.'s life-changing services has been increasing year on year; we currently have 497 on our register of interest.

The Board of Trustees worked with client representatives, staff members and volunteer trainers over several strategic planning sessions throughout Spring/Summer 2023 to develop the charity's next three-year strategy. The focus of this strategy is growth to meet demand from physically Disabled people across the U.K. wanting to train their own pet dog to become an accredited Assistance Dog. Dog A.I.D. has set itself the ambitious goal of doubling the number of client and dog partnerships we work with by the end of 2026. In working towards meeting our goal, we have identified **four key areas of focus** for our 2023-2026 strategy. To achieve the biggest impact, we will concentrate our resources in the following areas:

- Developing and supporting our people.
- Growing and strengthening our Dog A.I.D. community.
- Developing our organisational resilience.
- Raising awareness and income.

Developing and supporting our people:

Towards the end of the strategic planning process in June 2023, Dog A.I.D. recruited a new Chair of Trustees, Paul Miles. The Board will be accountable for the delivery of Dog A.I.D.'s strategy. During the development of the strategy, it was identified that the recruitment of a charity CEO was crucial to our ability to implement the plan and drive the charity's development. Following an open, competitive recruitment process Dog A.I.D. recruited its new CEO, Belinda (Bee) Johnson, in October 2023 with her appointment coinciding with the launch of the strategic plan.

We couldn't deliver our incredible work without the contribution of our skilled and experienced volunteer dog trainers. To double our number of Assistance Dog partnerships, we will need to increase our numbers of volunteer trainers significantly. Therefore, our primary area of focus in Year One of our strategy has been the recruitment of volunteers and putting in place mechanisms to support their long-term retention. In line with our strategic goal of "developing and supporting our people" we have:

- Developed a relationship with the Institute of Modern Dog Trainers (IMDT) who are promoting our volunteering opportunities to their members.
- Developed a relationship with the Professional Association of Canine Trainers (PACT), networking with trainers at their 2023 conference, producing a podcast in partnership with them and being selected as their practical demo partner for their 2024 conference, DogX.

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- Been a charity partner at the Association of Pet Behaviour Counsellor's (APBC) Conference, enabling us to network with, and recruit, volunteers whose values align with our own.
- Delivered monthly volunteer trainer recruitment information sessions for trainers wanting to find out more about our opportunities.
- Developed our CPD offer for volunteers including webinars by industry-noted professionals, hosting online drop-in sessions on task training and relaunching our online Charity Learning Consortium (CLC) platform in partnership with ADUK.
- Dedicated our Training and Volunteer Officer to providing 1-2-1 support for volunteer trainers including developing our induction offer for new trainers joining us to give them the best start to their volunteering journey with Dog A.I.D. and increase the likelihood of long-term retention.
- Developed video and written resources on training common Assistance Dog tasks to support our volunteers when working with Assistance Dog partnerships.
- Launched our first volunteer trainer survey to use insights and feedback from our volunteers to improve their experience with Dog A.I.D.

There are currently 95 dog trainers volunteering with Dog A.I.D.

Growing and strengthening our Dog A.I.D. community:

We have been developing the support that we provide to Assistance Dog partnerships. As of March 2024, we have 74 partnerships in training, 99 qualified partnerships and 22 applications in progress. In this financial year we had 35 Level 1 passes, 25 Level 2 passes and 18 Level 3 (fully qualified) passes.

We developed and delivered two training workshops in Telford in July and October 2023 for our qualified Assistance Dog partnerships. These workshops were delivered by our Dog A.I.D. staff team and with the generous support of volunteer trainers. These workshops enabled our partnerships to refresh their skills, prepare for annual assessments and gain peer support from other members of our community.

Over the year, the charity has created more opportunities for members of the Dog A.I.D. community to come together to gain valuable peer support from other clients, make new friendships, keep informed of developments within the charity, and engage with staff and volunteers. Dog A.I.D. clients have benefitted from:

- Opportunities for social interactions including online quizzes and client "coffee and chat sessions".
- The creation of new communications channels including a monthly news bulletin and relaunched an exclusive client Facebook page moderated and facilitated by client volunteers.
- The launch of our first client survey to obtain feedback from clients to inform our service development.

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- The development of resources for task training and supporting clients in preparing for assessments to maximise their chances of success.
- The delivery of our AGM in September 2023 during which feedback from the client survey and an overview of the 2023-26 strategy was presented.

Developing our organisational resilience:

Year One of the implementation of Dog A.I.D.'s strategy has been very much one of consolidation and planning. Since being in post, the CEO has undertaken a review of ways of working within Dog A.I.D. with an update of relevant policies and processes in order to maximise efficiencies, vital to the success of growing the charity.

Dog A.I.D.'s CEO has been representing the charity as part of an ADUK project to develop a Commons Outcome Framework for ADUK's coalition of Assistance Dog organisations. This project provides a valuable opportunity for Dog A.I.D. to better evaluate and demonstrate the positive impact of its work which will support the engagement of external stakeholders. It will also enable Assistance Dog organisations to report on outcomes consistently and collectively through ADUK.

Raising awareness and income:

Dog A.I.D. has submitted a successful funding application to the Pets Foundation for a substantial multi-year grant. We're incredibly grateful to the Foundation for their ongoing support which enables us to sustain the work undertaken to grow and develop our volunteer network during a previous grant period. The generous funding provided by Pets Foundation is enabling the charity to invest in two much-needed new team members to develop projects supporting our volunteer trainers and Assistance Dog partnerships.

Dog A.I.D. would like to extend its thanks and gratitude to our community supporters who work tirelessly to raise awareness and income for the charity. These include our clients who arrange and attend fundraising events across the U.K., members of the public who are inspired to support our life-changing work and for the generous support provided by corporate partners, Natural Instinct and Verso Lounges.

Statement of Public Benefit

The Trustees confirm that they have complied with the duty in the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission in setting objectives and planning activities.

Dog A.I.D. supports physically Disabled people throughout the UK to train their pets to qualify as Assistance Dogs, enabling them to live more independent lives by helping with many practical tasks, supporting them emotionally and physically, reducing isolation and care needs. By focusing on the existing pet/owner bond, long-term outcomes include:

- increased independence

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- increased social interaction and self-confidence
- improved mental wellbeing
- reduction in social isolation or reliance on family members or health services
- increased opportunities, with many of our clients being able to return to work, supported by their qualified Assistance Dog

We also see reduced reliance on emergency medical interventions, carers, friends, and family over many years. Many clients, and often their carers, can also return to work.

Financial Review

In the year Dog A.I.D. generated an overall surplus of £29,175 (2022/23 deficit £35,458) and this comprises:

- a surplus on unrestricted funds of £24,883 (2022/23 a surplus of £2,227), and
- a surplus on restricted funds of £4,292 (2022/23 a deficit of £37,685).

Total income was £186,055 (2022/23 £107,502) and this includes £115,334 (2022/23 £51,548) of grants and £30,195 (2022/23 £20,532) of legacies.

Total expenditure was £156,880 (2022/23 £142,960) and this includes £103,796 (2022/23 £84,387) of employment costs.

At the year-end, total reserves, which includes the market value of investments held, are £174,887 (2022/23 £143,129), of these £52,099 (2022/23 £4,841) are Designated Funds, £45,283 (2022/23 £40,991) are Restricted Funds and £77,505 (2022/23 £97,297) are Free Reserves.

Structure, Governance and Management

The trustees meet regularly and are responsible for:

- setting the strategic direction of Dog A.I.D. and its strategic plan;
- agreeing a set of policies for Dog A.I.D. to operate within;
- recruitment of trustees and senior staff
- approval of the annual budget and monitoring progress against that budget;
- approval of the Annual Report and Accounts; and
- managing risk.

A number of trustees are involved in the day to day operation of the charity. All staff have written job descriptions and their performance is monitored against these and their targets.

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Dog A.I.D. is established under a constitution dated 7th June 2018 as a Charitable Incorporated Organisation (CIO). The constitution requires that there are not less than three and not more than ten trustees. Previously Dog Assistance In Disability was a registered charity (registration number 1098619).

Client and Trainer representative trustees are elected at the AGM. Other trustees are appointed through open recruitment for identified skills and experience needed by the Board of Trustees.

The trustees serving during the year and to date are:

Trustee name	Office (if any)	Dates acted if not for whole year	Representative
Belinda Johnson	Secretary	Resigned 18 August 2023	
Isobel Michael	Deputy Chair		
Robert Moore			Client Representative
Lynn Stacey		Resigned 30 September 2023	Trainer Representative
Jonathan Attenborough		Resigned 30 September 2023	
Andrew Binks	Treasurer		
Gillian Helen Kirkman			Client Representative
Paul Miles		Appointed 1 June 2023 Resigned as Chair on 15 September 2024 Resigned 16 September 2024	
Fran Murtaugh		Appointed 30 September 2023	Trainer Representative
Hazel Shields		Appointed 1 July 2024	
Elizabeth Drury		Appointed 19 August 2024	
Louise Doran	Chair	Appointed 30 August 2024 Appointed as Chair on 15 September 2024	

Dog A.I.D is an accredited member of Assistance Dogs UK (charity number 1119538) and accredited by Assistance Dogs International (a not for profit organisation registered in the United States).

From 1 April 2021 the trustees committed the charity to being a Real Living Wage employer.

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Risk management

The trustees maintain a Risk Register as part of their Business Continuity and Risk Plan.
This register includes:

- Reputational risk;
- Operational risk;
- Finance risk;
- Legislation / Compliance risk
- Employment risk
- External risk; and
- Governance risk

The Trustees declare that they have approved the annual report and accounts.

Signed on behalf of the trustees

Signature		
Name	Andrew Binks	Paul Miles
Position	Treasurer	Chair of Trustees
Date	15 September 2024	15 September 2024

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Independent Examiners Report for the year ended 31 March 2024

I report to the charity trustees on my examination of the accounts of the charity for the year ended 31 March 2024.

This report is made solely to the charity's trustees, as a body, in accordance with section 145 of the charities Act 2011 and regulations made under section 145 of that Act. My work has been undertaken so that I might state to the charity's trustees those matters I am required to state to them in an Independent Examiners Report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body, for my work or for this report.

Responsibilities and basis of report

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

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

Independent Examiner's statement

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

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts did not accord with the accounting 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.

C Moelwyn-Williams

Mrs C L Moelwyn-Williams BSc FCA

TCA (Shrewsbury) LLP
Third Floor, 21 St Mary's Street
Shrewsbury
Shropshire
SY1 1ED

Date - 17th September 2024

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Receipt and Payments Account to 31 March 2024

	Notes	Unrestricted Funds	Restricted Funds	Total	£ 2022/23 Total
<u>Income</u>					
Charitable Trust and Foundation Grants		55,200	60,134	115,334	51,548
Community Fundraising		16,853	-	16,853	14,809
Donations		11,579	-	11,579	5,059
Corporate Support		2,474	-	2,474	3,551
Legacies		30,195	-	30,195	20,532
Charitable Activities		6,785	-	6,785	8,613
Trading Activities		1,800	-	1,800	2,908
Other		1,035	-	1,035	482
Total Income		125,921	60,134	186,055	107,502
<u>Expenditure</u>					
Employment Costs	2	64,851	38,945	103,796	84,387
Office Support Costs		11,845	3,798	15,643	18,001
IT Costs		3,524	1,917	5,441	4,918
Premises Costs		11,503	1,743	13,246	11,460
Goods for Resale		-	-	-	1,340
Client Delivery Costs		7,511	9,439	16,950	21,777
Fundraising and Events		1,804	-	1,804	1,062
Trustee Expenses	3	-	-	-	15
Total Expenditure		101,038	55,842	156,880	142,960
Net Income less Expenditure		24,883	4,292	29,175	-35,458
Cash balance at 1 April 2023	4	42,056	40,991	83,047	118,505
Cash balance at 31 March 2024		66,939	45,283	112,222	83,047
Investments	5	62,665	-	62,665	60,082
Reserves at 31 March 2024	6, 7	129,604	45,283	174,887	143,129

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1. Basis of Accounting

These accounts have been prepared on a cash receipts and payments basis other than Investments which are shown at market value.

Restricted Funds arise where the donor stipulates what the funds are to be spent on. In the event that they are not spent as stipulated they may be returned to the donor.

Designated Funds arise where the Trustees decide to ring-fence funds for a specific purpose. In the event that they are not spent as specified they will be re-designated as unrestricted.

2. Employment Costs

	31 March 2024	31 March 2023	Average 2023/24
No of Employees	4	5	4.4
Full Time Equivalents	3.4	3.9	3.5

No employee was paid in excess of £60,000.

Fundraising costs are estimated at £11,359 (2022/23 £9,541) and are reported in Employment Costs.

3. Trustee expenses

Trustees are not remunerated for their services and are reimbursed for expenses incurred as trustees.

A number of Trustees are also volunteer trainers or clients. The following expenses have been incurred:

	31 March 2024	31 March 2023
As Trustee only	-	15
As Trustee and trainer/client	306	947
As volunteer trainer only	648	1,364
Total costs included in Client Delivery Costs	954	2,311

There were no transactions with related parties.

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4. Investments

	31 March 2024		31 March 2023	
	Market Value	Cost	Market Value	Cost
M&G Equities Investment Fund for Charities	62,665	53,000	60,082	53,000
	<u><u> </u></u>	<u><u> </u></u>	<u><u> </u></u>	<u><u> </u></u>

£

5. Restricted Funds

At the year-end Restricted Funds were held for the following purposes:

	31 March 2024	31 March 2023
Client partnerships in specified areas	21,650	11,529
Remote delivery	-	1,045
Specific staff roles	9,780	6,834
Trainer workshops	5,957	11,313
Client workshops	6,896	9,270
Other	1,000	1,000
Total	<u><u>45,283</u></u>	<u><u>40,991</u></u>

£

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6. Free Reserves

Following the adoption of a strategic plan to double over three years the number of clients in training partnerships, the Trustees have reviewed their policy on Free Reserves.

The charity now aims to hold, as free reserves, a minimum of 6 months of operating costs; this includes ongoing contractual obligations and a provision for investment valuation fluctuations; to provide stability and as a precaution against unexpected fluctuations in incomes and expenditures and to maintain financial resilience. Under this policy the charity aspires to hold a minimum of Free Reserves at 31 March 2024 of £78,000

In 2023/24 the charity experienced growth in its unrestricted income from the kind support from Charitable Trusts and Foundations and the receipt of a substantial legacy.

At 31 March 2024 the charity has created a designated fund of £49,167 to invest in resources required to support its strategic plan growth aspirations to meet demand from physically Disabled people across the UK ahead of building new and growing income streams through our Fundraising Strategy. In addition the charity has classified £2,932 (2022/23 £4,841) as a designated fund in respect of an undertaking arising on receipt of a legacy.

Free Reserves are:

	31 March 2024	£ 31 March 2023
Unrestricted Funds shown above	129,604	102,138
Less: Designated Funds	52,099	4,841
Free Reserves	<u>77,505</u>	<u>97,297</u>