

Professionals with Alzheimer's United Kingdom

Accounts

For The Year Ended 31 March 2022

**Professionals with Alzheimer's United Kingdom
Reference and Administrative Details**

Charity Name Professionals with Alzheimer's United Kingdom

Other Names PALZ UK

Charity Number 1190292

Principal Address Yew Tree Cottage
Longnor
Shrewsbury
SY5 7PP

Trustee's Elizabeth Andree Holdsworth
Sarah Rachel Sharpe
Philip John Davies
Christine Kendall
Katrina Eleanor Hall

Accountant Community Accounting Services Ltd
7 Napoleon Drive
Shrewsbury
SY3 5PH

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2022**

The trustees present their annual report and financial statements of the charity for the year ended 31 March 2022. The financial statements have been prepared in accordance with the Charities Act 1993 and the Statement of Recommended Practice: Accounting and Reporting by Charities published in 2005.

Structure, Governance and Management

The charity is registered with the Charity Commission and is run in accordance with the Constitution adopted on 8 July 2020.

Trustee selection methods

New trustees are appointed by a resolution passed at a properly convened meeting of the charity trustees and individuals are selected having regard to the skills, knowledge and experience needed for the effective administration of the CIO.

The trustees have been provided with access to the Public Benefit Guides produced by the Charity Commission and have regard to that guidance.

Objectives and Activities

For the public benefit, the relief and assistance of people who have held challenging and demanding jobs and who are now living with Alzheimer's (or dementia from other causes), with a social environment of peer support and mental challenge which will provide self-respect, confidence, mental stimulation and involvement to those who attend and their supporters.

We support our community through:

- The provision of bi-monthly meetings including a talk by a high calibre speaker and the opportunity for discussion and socialising between participants in the early stages of a dementia diagnosis and their supporters in Shropshire.
- The provision of follow up visits or social activities depending on the preferences of participants as we develop.
- Providing an opportunity for participants and their supporters to re-experience the intellectually stimulating environment they once shared and to make connections and friendships with others in a similar situation.
- Working with a range of local and national organisations to promote awareness of the provision; to identify those that may benefit; and to facilitate referral pathways and learn from each other.
- Seeking opportunities for setting up groups in other areas in order to expand the provision throughout the UK.

Although aimed at professionals and business people with early dementia we have an inclusive approach, welcoming all people who wish to attend and who may benefit from the provision.

We do not replicate activities for people with advanced dementia or people who would prefer a health/care/church setting for whom existing excellent services are available.

PALZ UK focuses not on the disease but on the person who had an active, interesting life before being diagnosed with dementia.

PALZ UK is not just for people with dementia - it is a dementia friendly activity that everyone can enjoy.

Contributions made by Volunteers

PALZ UK does not currently have any paid staff and all work is carried out by volunteers. It is estimated that approximately 150 hours per month are provided by way of:

- Management of the charity
- Organising meetings
- Promoting the charity to potential referrers
- Communicating with and supporting participants and their supporters

Achievements and Performance in the year

The Covid 19 pandemic continued to disrupt the work of the organisation, particularly during the early part of the period but we were still able to achieve the following during the year:

- 4 face to face meetings with a speaker (also available on Zoom)
- 6 meetings on Zoom
- Regular contact with participants by phone and email to provide support and to update on developments
- Contribution of bi-monthly meetings of trustees, initially via Zoom and then in person when restrictions allowed
- Continuation of regular meetings of the Shropshire committee via Zoom
- Identifying charitable trusts to approach for funding and preparing and submitting funding applications
- Being enabled by sponsorship from AICO Ltd in Oswestry to make a video showing the benefits of PALZ. This was distributed to over 100 contacts further raising awareness of PALZ and thus introducing more people to the benefits of PALZ.
- Attendance at country-wide Dementia events and this further raising awareness
- Reviewing trustees' skills sets and seeking to identify potential new trustees for the organisation and recruiting two new trustees (one of whom replaced an existing trustee who retired due to other commitments)

**Trustees' Report
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The difference we made to the circumstances of its beneficiaries during this period can be summed up in the words of beneficiaries and their supporters in the words of a letter received from the wife of one of our supporters which has been reproduced below:

November 2022 - Tony and I really appreciate the hard work that you and the PALZ committee do on behalf of ourselves and the rest of the group.

Having or living with someone who has dementia can be a very lonely place and since Tony's diagnosis, which is more than four years ago now, our lives have changed enormously.

We've always lived very full and active lives enjoying holidays across Europe in our motor home, having friends and family to stay or visit and taking part in a very active village life. We were also keen walkers and enjoyed among other things gardening, local history and socialising.

Sadly as Tony's memory has worsened his confidence has completely gone and he no longer wants to get involved with any social activities. He doesn't recognise friends and even some family members now so when we are invited to visit people or take part in a social event he gets understandably anxious. This means that I no longer enjoy the social life I once loved.

The one exception to this is attending the PALZ meetings. Since the first we came we instantly felt welcomed and 'at home' which is, I think, due to the similar experiences we share with the group. Our friends and family have all been wonderful and sympathetic to us but they don't truly understand what it's like on a day to day basis to have, or like with someone who has dementia.

The variety and balance of the meetings is excellent and offers something for everyone; from local history, to travel, to Shropshire raptors, and even a magician, who by the way was excellent. I'm certainly looking forward to hearing the retired judge at the next meeting. In addition to the speakers we also have talks from o/her service providers and gain valuable information about what's available to help us with day today living. All of this is done with such dignity, no one treats Tony as if he's no longer got a brain and, at the risk of once more repeating myself, it's his memory that he's lost not his intellect and PALZ understand that.

Even during the darkest days of lockdown when, especially for me, not seeing our friends and family was very lonely, we still had PALZ. The regular zoom meetings were something that kept us in touch with each other and gave me something to look forward to. The support we got helped us to get through the dreadful pandemic.

So again I'd like to thank you and the team for everything you have done for us and I wish you every success in spreading the word about PALZ across the country.

With fondest good wishes Pat

Financial Review

The charity's financial position is healthy and, as all work is currently carried out by volunteers, overheads remain small.

Reserves Policy

As overheads currently run at a very low level and we hold more than sufficient cash at bank to cover these for at least the next 6 months, we currently hold all funds in the same general account. However, we will monitor the use of funds and advise trustees at each general meeting whether funds are sufficient for PALZ UK to continue to operate. As the charity grows and overheads increase, it is proposed that we will work towards a reserves policy of 6 months to cover the likely cost of staff, activity and other over heads.

Risk Review

A detailed risk assessment has been carried out and will be formally reviewed annually, considered informally at each general meeting and updated accordingly. The most significant risks identified during this period were:

- The effect of the pandemic on provision of the service when face to face meetings were not possible. This was addressed by providing the service on-line and providing support by phone and email.
- Potential loss of the key trustee (the Chair) and this is being addressed by an active policy of identifying and seeking to recruit more trustees with the relevant skills to ensure the future of PALZ UK. During this period 2 new trustees were recruited, one with many years of experience in PR and marketing and involvement in fundraising for other organisations and the other with legal qualifications to replace an existing, legally qualified trustee who retired during this period. The requirement for further trustees was identified.

Declaration

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

Signed on behalf of the charity's trustees

Elizabeth Andree Holdsworth
Chairman

Date

**Independent Examiner's Report to the
Management Committee of Professionals with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2022**

Basis of independent examiner's report

We report on the accounts of Professionals with Alzheimer's United Kingdom for the year ended 31 March 2022.

The Group's officers are responsible for the preparation of the accounts. The Group's officers consider that an audit is not required for this year and that an independent examination is needed.

It is our responsibility to:

- examine the accounts
- to follow the general directions for the conduct of an independent examination
- to state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with general directions for an independent examination. An examination includes a review of the accounting records kept by the committee 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 a committee concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently we do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

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

1. which gives us reasonable cause to believe that in, any material respect, the requirements
 - to keep appropriate accounting records; and
 - to prepare accounts which accord with the accounting records and comply with applicable financial reporting standardshave not been met; or
2. to which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Community Accounting Services

**Community Accounting Services Ltd
7 Napoleon Drive
Shrewsbury
SY3 5PH**

Date: 25/01/2023

**Professionals with Alzheimer's United Kingdom
Income & Expenditure Accounts
for the Year Ended 31 March 2022**

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total Funds 2022 £	<i>Total Funds 2021 £</i>
Income				
Grants	-	-	-	1,000
Donations	987	-	987	570
Sale of refreshments	178	-	178	-
Other income	150	-	150	-
Total Income	1,315	-	1,315	1,570
Expenditure				
Running costs				
Insurance	142	-	142	95
Speakers	70	-	70	103
Printing & stationery	82	-	82	-
Website costs	390	-	390	-
Computer costs	16	-	16	-
Venue hire	520	-	520	-
Sundry	46	-	46	-
Total Expenses	1,266	-	1,266	198
Net Incoming Resources Before Transfers	49	-	49	1,372
Transfer Between Funds	-	-	-	-
Net Incoming Resources	49	-	49	1,372
Fund balance brought forward at 1 April 2021	4,223	-	4,223	2,851
Fund Balance Carried Forward at 31 March 2022	4,272	-	4,272	4,223

The statement of financial activities includes all gains and losses recognised in the year. All incoming resources and resources expended derive from continuing activities.

Professionals with Alzheimer's United Kingdom
Balance Sheet
2022

Note	2022		2021	
	£	£	£	£
Current Assets				
Bank	4,272		4,223	
	<u>4,272</u>	4,272	<u>4,223</u>	4,223
Net Assets		<u><u>4,272</u></u>		<u><u>4,223</u></u>
Represented by Funds				
Unrestricted fund		4,272		4,223
Restricted funds		-		-
		<u><u>4,272</u></u>		<u><u>4,223</u></u>

The Trustees approve the accounts which comprise of the SOFA, the Balance Sheet and the related notes and acknowledge their responsibility for the accounts, including the appropriateness of the applicable financial reporting framework, and for providing Community Accounting Services Ltd with all information and explanations necessary for their compilation.

Elizabeth Andree Holdsworth
Chairman

Date
