

Professionals with Alzheimer's United Kingdom

Accounts

For The Year Ended 31 March 2023

**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

Trustees Elizabeth Andree Holdsworth
Catherine Olivia Balmforth Slater
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 2023**

The trustees present their annual report and financial statements of the charity for the year ended 31 March 2023. 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.

PALZ UK is led and managed by volunteer trustees. Currently there are 5 but the charity is seeking to recruit more. The PALZ Shropshire branch group is managed by a separate committee of 4 volunteers and assisted by a further 3 volunteers at the meetings. There are no paid staff.

The charity is not part of an umbrella group.

The charity was inspired by, is based on a similar model to, and has an informal affiliation with PALZ Global based in Australia but remains independent.

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.

We have a written procedure for the induction of trustees and all trustees are encouraged to attend relevant on-line training courses

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 400 to 500 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

**Trustees' Report
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Achievements and Performance in the year

With the relaxation of Covid restrictions we have been able to return to face to face meetings and more hands on support for participants including:

- 6 face to face meetings with a speaker of the Shropshire PALZ group
- Regular contact with participants by phone and email to provide support and to update on developments
- Continuation of bi-monthly meetings of trustees in person with the option for trustees to attend via Zoom if they were unable to attend in person
- Continuation of regular meetings of the Shropshire committee
- Inviting interested parties for the dementia services to attend meetings of the Shropshire PALZ group to see how successful they are
- Identifying charitable trusts to approach for funding and preparing and submitting funding applications
- Receiving a gift of donations from the family of a participant who sadly died during the year (one of a number received by the organisation since inception) which reflects what the family feels about the benefit of PALZ to their family member with dementia
- Further raising awareness of PALZ via engagement with dementia services countrywide; meetings with Admiral Nurses; adding interested parties to our contact list and regularly updating them on the success of the group; emailing television and radio stations; having an article published in the PENNANT magazine (the journal of the forces pension scheme); and distribution of leaflets throughout the country. In each case we promoted the benefit PALZ provides to those with dementia and their supporters
- Continuing to promote contact with and canvass the support of people in Shropshire whose positions could help promote PALZ including welcoming as speakers both Mrs Selena Graham (the High Sheriff) and Mr Andy Begley (the Chief Executive of Shropshire Council)
- Attendance at county-wide dementia events and thus further raising awareness
- Submitting an application to be included as a service recommended under the Social Subscribing Scheme
- Increasing the number of participants and supporters attending the meetings of the Shropshire group
- Reviewing our trustees' skills set and seeking to identify potential new trustees for the organisation
- Continuing to recruit volunteers to assist with the running of the Shropshire group

The difference we made to the circumstances of its beneficiaries during this period can be summed up in the words of participants and their supporters in the following letters received from attendees of meetings of the Shropshire group:

Well done, a first class meeting. I am sure everyone went home very happy following a most enjoyable morning.

I am a member of u3a and also a Rotary club. Palz is like u3a without the arguments and bickering and like Rotary without the need to be constantly doing good works, and the arguments and bickering!

We have the date of the next meeting in our diaries and look forward to being with you then.'

And

'Thank you for your recent emails and also the video. It was sad to hear of the loss of a new member before we had chance to know him. Sadness is with us at all times with dementia, learning to cope with it is quite an undertaking but being part of a group like PALZ gives us

I do feel our group is special and so different from others but in the fullness of time I hope the news will travel and others will be able to share in what we have.

Geoff and I are so grateful that we were fortunate enough to be part of PALZ from the beginning and our thanks go to you and those good people who support the group.

Looking forward to September.'

We continue to provide dignity and respect to bright people who just happen to have dementia

We have continued to receive steady funding throughout the year, sufficient to cover running expenses and provide a fund for on-going expansion.

The support we continued to provide is appreciated by participants and their supporters as shown as shown in the wording of the letters produced above.

**Trustees' Report
of Professional with Alzheimer's United Kingdom
on the Accounts for the Year Ended 31 March 2023**

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 overheads.

Principal source of funds

The principal sources of funding are:

- Local grants
- Individual private and business donors
- Trusts

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 no new trustees were appointed or retired but the current trustees have continued to identify and recruit new trustees to complement the skills of the existing ones.

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 2023**

Basis of independent examiner's report

We report on the accounts of Professionals with Alzheimer's United Kingdom for the year ended 31 March 2023.

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: 09/01/2024

**Professionals with Alzheimer's United Kingdom
Income & Expenditure Accounts
for the Year Ended 31 March 2023**

	Unrestricted Funds 2023 £	Restricted Funds 2023 £	Total Funds 2023 £	<i>Total Funds 2022 £</i>
Income				
Donations	6,549	-	6,549	987
Sale of refreshments	95	-	95	178
Other income	74	-	74	150
Total Income	6,718	-	6,718	1,315
Expenditure				
Running costs				
Insurance	156	-	156	142
Accountancy	370	-	370	-
Speakers	-	-	-	70
Printing & stationery	553	-	553	82
Website costs	270	-	270	390
Computer costs	-	-	-	16
Venue hire	855	-	855	520
Refreshments	187	-	187	-
Sundry	18	-	18	46
Total Expenses	2,409	-	2,409	1,266
Net Incoming Resources Before Transfers	4,309	-	4,309	49
Transfer Between Funds	-	-	-	-
Net Incoming Resources	4,309	-	4,309	49
Fund balance brought forward at 1 April 2022	4,272	-	4,272	4,223
Fund Balance Carried Forward at 31 March 2023	8,581	-	8,581	4,272

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
2023

Note	2023		2022	
	£	£	£	£
Current Assets				
Bank	8,581		4,272	
	<u>8,581</u>	<u>8,581</u>	<u>4,272</u>	<u>4,272</u>
Net Assets		<u><u>8,581</u></u>		<u><u>4,272</u></u>
Represented by Funds				
Unrestricted fund		8,581		4,272
Restricted funds		-		-
		<u><u>8,581</u></u>		<u><u>4,272</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
