

# Pro-Active Community Annual Return

**Charity Number 1191570**

**For the period 1/10/20 to 31/3/2022**

Registered address:

1 Castlefield Court  
Church Street  
Reigate  
RH2 0AH  
01737924084

[hello@proactivecommunity.org.uk](mailto:hello@proactivecommunity.org.uk)

[www.proactivecommunity.org.uk](http://www.proactivecommunity.org.uk)

## Who we are and what we do?



"I am Lizzie Wheeler, and I was the Chair of the Pro-active Community In 2020/21. We have been very busy since registering as our own charity.

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Hi, I am Matthew Leadbeater and I became the Chair of the Pro-Active Community in 2021.



We are a charity that supports people with learning disabilities and autism, run by people with learning disabilities and autism.

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## Our Board



Jade Vallance

Nicki Fraser

Edward Cooke



Leanne



Lizzie



Michael



Our Board members:

Board No.	Name	Date started
1.	Edward Cooke	5/5/20
2.	Nicki Fraser	5/5/20
3.	Leanne Yeo	6/5/20
4.	Lizzie Wheeler	7/5/20
5.	Michael McLachlan	7/5/20
6.	Jade Vallance	9/6/20
7.	Michael Farrington	29/9/21
8.	Matthew Leadbeater	29/9/21

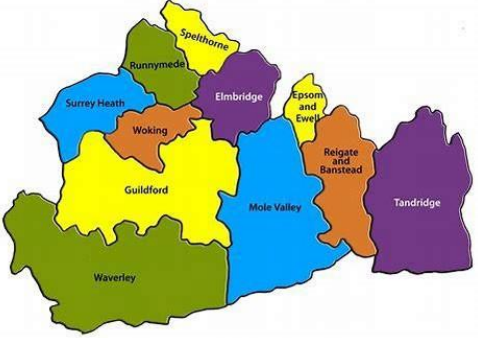



We have 8 people on our Board as registered Board members but have 20 members to support the Board and 200 people as part of our network.

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	<p>We are mainly based in Surrey but do work in other areas in the Southeast of England.</p>
	<p>We ensure services, providers, local and national governments hear our voice on what matters to us.</p>

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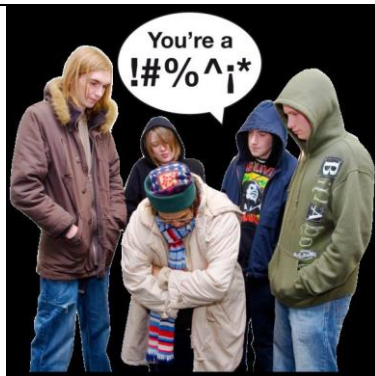
 <p>A spiral-bound notebook with a white cover. The word "Plans" is written in bold black letters at the top. Below the text is a photograph of three people (two men and one woman) leaning over a table, looking at a document together.</p>	<p>We support co-production as equal partners in developing and shaping services that meet our needs</p>
 <p>A close-up of a green pencil pointing to a checklist. The word "Quality" is written in a large, cursive font at the top. The checklist has four items: "Excellent" (checked with a green tick), "Good", "Average", and "Poor".</p>	<p>We audit services to make sure people understand what it is like to have a learning disability and autism. We are experts by experience.</p>
 <p>A man with short dark hair, wearing a bright yellow t-shirt with a blue and white circular logo that says "dp". He is holding a grey megaphone to his mouth and gesturing with his right hand.</p>	<p>We train and empower people to speak up.</p>
 <p>A group of about ten people, including men, women, and a person in a wheelchair, standing on a stage. Behind them is a large screen displaying the word "SUPERHEROES" in a stylized, colorful font. The people are smiling and some are raising their hands.</p>	<p>We ensure people are rewarded for their time and talents.</p>

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We support inclusion and fight discrimination.



We facilitate a range of forums such as the Surrey Peoples Group in partnership with Surrey County Council.



We campaign and say when things are not right.



We fundraise and support our communities.

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	<p>We give back and use our skills to help others.</p>
	<p>We arrange events, conferences, holidays and social gatherings.</p>
	<p>We support face-to-face and digital communication.</p>
	<p>We support Makaton training.</p>




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	<p>We work in partnership with key organisations such as Active Prospects.</p>
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### What have we achieved in the last two years?

	<p>We have rebranded.</p>
<p><a href="http://www.proactivecommunity.org.uk">www.proactivecommunity.org.uk</a></p>	<p>We have refreshed our website.</p>
	<p>We have set up a Facebook page.</p>
	<p>We have formed a relationship with the LeDer campaign around the death review of people with learning disabilities. We have produced a video for NHS staff to understand the challenges of a person we a learning disability or autism.</p>

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	<p>We have supported the Surrey five year Autism Strategy</p>
	<p>We have designed and produced quality Checker training.</p>
	<p>We have carried out several face-to-face Quality Checker Audits for organisations such as Active Prospects and Surrey County Council.</p>
	<p>We have trained 6 people to be Per Health Champions.</p>
	<p>We have supported Surrey Health watch in their annual survey.</p>
<p><a href="https://www.youtube.com/watch?v=gW7OZffWWRo">https://www.youtube.com/watch?v=gW7OZffWWRo</a></p>	<p>We have made several podcasts about key messages such as the environment. These can be found on our website.</p>

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We have discussed and debated key issues such as black lives matter.

### Our Financial results and plans



We are on track with our budget and finances.

All work carried out by the Pro-Active Community is based in the UK.

Accounts are from April 2020-Mar 22.

Pro-Active Community does not own or lease a property.

The accounts have been prepared to comply with the rules of the charity commission and SORP 102.

There has been a substantial increase in the turnover of the organization from £15.4k in 20/21 to £62.5k this year. This is as a result of formalising the financial relationship between Active Prospects and the Pro-Active Community.

The costs charged across to the Proactive community now show a truer picture of the dedicated costs incurred by the Pro-active Community.

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	<p>These include a dedicated head and associated support and materials. These are then offset with a grant currently from Active Prospects but as the Pro-Active Community grows, we would look to obtain alternative funding for these costs</p> <p>Accounts were approved by an Independent examiner on the 24 May 2022.</p> <p>The Chair and Secretary of the Board have signed on behalf of all Board members.</p>
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	<p>We had £12k funding through Surrey County Council to support digital initiatives and zoom meetings in 2020 to set up and facilitate a zoom advocacy group.</p>
	<p>We are still working in partnership with Active Prospects to support our members to learn how to run a webpage, Facebook page and manage our accounts.</p> <p>This is done with a Service Level agreement with Active Prospects to ensure we are independent.</p>
	<p>We have set up a new bank account that can support online banking for our charity.</p>

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## Key risks





		<p>We are worried about funding for services for people with learning disabilities.</p>
		<p>We are worried about the ongoing issues around Covid and impact on people with learning disabilities.</p>
		<p>We are worried about the future of social care and social care reform.</p>
		<p>We are worried that people might not have staff to support them to be part of the Pro-Active Community as there is a recruitment shortage.</p>

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## Our Future Plans

	<p>To start a forum in West Sussex called the West Sussex People's Group</p>
	<p>To fundraise so we can have paid roles, buy our own equipment and train our members.</p>
	<p>To increase our income through selling our services such as Quality Checkers and consulting on key projects.</p>
	<p>To put on a National conference to tell people about our work, impact of social care reform on people with learning disabilities and autism.</p>

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<p><b>Our Charter</b></p> 	<p>To review our charter.</p>
	<p>To increase use of our website and social media, and share our messages through the media.</p>
 <p>Learning Disability England</p>	<p>To link with other national organisations such as Learning Disability England</p>
	<p>We want to be more diverse in our members and Board members.</p>

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For more information, visit our website



**Proactive Community  
Statement of Income and Expenditure  
Year Ended 31st March 2021**

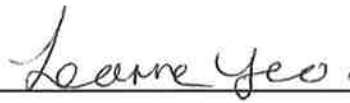
	<b>2020/21</b>	<b>2019/20</b>
	<b>£</b>	<b>£</b>
<b>Fixed Assets</b>		
Accrued Income	50,000	
Cash at bank and in hand	14,284	2,010
<b>Current Assets</b>	<b>64,284</b>	<b>2,010</b>
	<hr/>	<hr/>
<b>Less current liabilities</b>		
	<hr/>	<hr/>
<b>Net Current Assets</b>	<b>64,284</b>	<b>2,010</b>
	<hr/>	<hr/>
<b>Creditors</b>	<b>49,512</b>	
	<hr/>	<hr/>
	<hr/>	<hr/>
<b>Net Assets</b>	<b>14,772</b>	<b>2,010</b>
	<hr/>	<hr/>
Capital & Reserves		
Restricted Funds		
Unrestricted Funds	14,772	2,010
	<hr/>	<hr/>
	<b>14,772</b>	<b>2,010</b>
	<hr/>	<hr/>

These Accounts were approved at the AGM on 29th September 2021

Lizzie Wheeler

\_\_\_\_\_  
Lizzie Wheeler  
Chair

Leanne Yeo

  
\_\_\_\_\_  
Leanne Yeo  
Board Member

\_\_\_\_\_  
Jade Vallance

  
\_\_\_\_\_  
Jade Vallance

Secretary



**Proactive Community  
Statement of Income and Expenditure  
Year Ended 31st March 2021**

	<b>2020/21</b>	<b>2019/20</b>
<b>Income</b>	<b>£</b>	<b>£</b>
Grants	12,000	153
Donations	50,000	15,000
Membership		166
Fundraising	456	
Entry Fees		
Hire		
Donations		79
<b>Total Income</b>	<b>62,456</b>	<b>15,398</b>
<b>Expenditure</b>		
Activities		394
Holiday Costs		
Administration		
Service Charges	49,512	15,000
Travel		135
Refreshments		30
Co. Seal	26	
IT Costs	156	
Venue Rentals		304
<b>Total Expenditure</b>	<b>49,694</b>	<b>15,862</b>
<b>Final Surplus/(deficit)</b>	<b>12,762</b>	<b>- 464</b>

**Note**

These accounts are produced on a cash accounting basis

**Service Charges are listed below**

Recharge of HG salary & costs	£	2,126	per month
General Mgt and operational support	£	1,000	per month
Governance Support	£	500	per month
Training and Materials	£	500	per month
<b>Total</b>	£	<b>4,126</b>	<b>per month</b>
	£	<b>49,512</b>	<b>per annum</b>

**Independent examiner's report to the trustees of Pro-Active Community (Charity Number 1191570)**

I report to the trustees on my examination of the accounts of the Pro-Active Community for the year ended 31<sup>st</sup> March 2022.

**Responsibilities and basis of report**

As the trustees of the Pro-Active Community 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 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view which is not a matter considered as part of an independent examination.

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.

Signed:



Name: DAVID DINWOODIE

Relevant professional qualification or membership of professional bodies (if any):

Chartered Accountant (CA) | CAS # M24224

Address:

8 HIGHLANDS ROAD  
REICATIE

SURREY RH2 0LA

Date:

24/5/22

**Pro Active Community**  
**Statement of Income and Expenditure**  
**Year Ended 31st March 2022**

	<b>2021/22</b>	<b>2020/21</b>
<b>Income</b>	<b>£</b>	<b>£</b>
Grants	8,500	12,000
Donations	50,000	50,000
Membership		
Fundraising	679	456
Bequests	10,728	
Hire		
Donations		
<b>Total Income</b>	<b>69,906</b>	<b>62,456</b>
<b>Expenditure</b>		
Activities		
Holiday Costs		
Administration		
Service Charges	48,563	49,512
Travel		
Refreshments		
Co. Seal		26
IT Costs		156
Venue Rentals		
<b>Total Expenditure</b>	<b>48,563</b>	<b>49,694</b>
<b>Final Surplus/(deficit)</b>	<b>21,344</b>	<b>12,762</b>

**Note**

These accounts are produced on a cash accounting basis

Pro Active Community  
Statement of Income and Expenditure  
Year Ended 31st March 2022

	2021/22 £	2020/21 £	
<b>Fixed Assets</b>			
Accrued Income		50,000	
Cash at bank and in hand	36,212	14,284	
<b>Current Assets</b>	<u>36,212</u>	<u>64,284</u>	
<b>Less current liabilities</b>			
<b>Net Current Assets</b>	<u>36,212</u>	<u>64,284</u>	
<b>Creditors</b>	<u>-</u>	<u>49,416</u>	
<b>Net Assets</b>	<u><u>36,212</u></u>	<u><u>14,868</u></u>	21,343
<b>Capital &amp; Reserves</b>			
Restricted Funds			
Unrestricted Funds	36,212	14,868	
	<u>36,212</u>	<u>14,868</u>	

These Accounts were approved at the AGM on

*myleadbeater*

Matthew Leadbeater  
Chair

Edward Cooke  
Board Member

*E Cooke*

20th July 2022

Jade Vallance  
Secretary



**Pro Active Community : Grant to Pro Active and Recharges of costs incurred  
April 2021 to March 2022**

	£
Stationery	14.39
Gifts & Entertainments	277.71
Subscriptions	276.8
Computer Costs	245.18
Renewals and Replacements	109.99
Consultancy	3,950.00
Activities	357.87
	<b>5231.94</b>
Salaries	35,530.84
General Management and Operational Support	7800
<b>Total Costs To be charged to Pro Active Community</b>	<b>48,562.78</b>
Grant from Active Prospects	50,000.00
<b>Net payment to the Pro Active Community to be paid no later than 31.03.2022</b>	<b>1,437.22</b>

## Cash Reconciliation 21/22

Opening Bank Value		£ 14,097.42	
Petty Cash		£ 186.77	
<b>Total Cash</b>		<b>£ 14,284.19</b>	
Petty Cash			
Bank	16th Nov 21	-£ 20.50	Cash
Bank	23rd Nov 21	£ 12.77	Kindlink Ltd
Bank	3rd Dec 21	£ 23.99	Kindlink Ltd
Bank	7th Dec 21	£ 488.00	ActiveProspects
Bank	10th Dec 2021	£ 4.59	Kindlink Ltd
Bank	21st Dec 2021	£ 1,000.00	Albert Hunt Trust
Bank	18th Jan 2022	£ 3.19	Kindlink Ltd
Bank	21st Jan 2022	£ 2,500.00	Baily Thomas Grant
Bank	1st March 2022	£ 5,000.00	Community Fiundation Grant
Bank	24th March 2022	£ 750.00	David Solomon Trust
Bank	24th March 2022	£ 10,727.62	Bequest L. Bader
Bank	24th March 2022	£ 1,437.72	Net of AP grant and recharges - as per summary tab
Petty Cash	24th March 2022	£ 166.77	Transfer Petty Cash O/S to AP then to PAC
		-£ 166.77	
Closing Bank		£ 36,211.57	
Closing Petty Cash		£ -	
<b>Total Cash close</b>		<b>£ 36,211.57</b>	
<b>Movement</b>		<b>£ 21,927.38</b>	

Income Type  
Fund Raising  
Fund Raising  
Fund Raising  
Fund Raising  
Fund Raising  
Grant  
Fund Raising  
Grant  
Grant  
Grant  
Bequest  
Grant  
Fund Raising

**Agreement between Active Prospects and The Proactive Community**

**Period Covered : April 2021 to March 2022**

**1 Grant**

Active Prospects will provide a grant to The Pro Active Community (Charity 191570) to pursue its charitable objectives of developing the capacity and skills of the community of people living with autism, learning disabilities and mental health needs living in Surrey and the surrounding area.

The value of the Grant is £50,000

**2 Recharge of Costs incurred by Active Prospects**

**Active Prospects will charge the following costs**

Stationery

Gifts and Entertainment

Subscriptions

Computer Costs

Renewals and Replacements

Consultancy

Activities

Specific dedicated resource

General Management and Operational Support

**These costs will be charged as follows:**

Net amount of the two values to be transferred week commencing 20<sup>th</sup> March 2022

On behalf of Active Prospects



**Maria Mills**

Chief Executive, Active Prospects

**Date**

27.07.2022

On behalf of The Pro Active Community



**Jade Vallance**

Trustee, The Pro Active Community

**Date**

27.07.2022