

**EQUALITY TOGETHER**

**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**

**FOR THE YEAR ENDED 31 MARCH 2021**

**Company Registration No. 02221536 (England and Wales)**  
**Charity Registration No. 700084**

# EQUALITY TOGETHER

## LEGAL AND ADMINISTRATIVE INFORMATION

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Trustees	Gill Bowskill - Chair Andrew Ward - Treasurer Alvin Adey - Vice Chair Jenny Scott Lynn Asquith Joanne Bolland (Appointed 7 October 2020) Mohinder Singh Chana (Appointed 5 November 2020) Natalie Jovanovic (Appointed 7 January 2021) Balu Iad (Appointed 5 November 2020) Mathew Ward (Appointed 5 November 2020)
Senior management team	J Griffiths M Nicholson (Chief Executive Officer)
Charity number	700084
Company number	02221536
Principal address	Manningham Mills Community Centre The Silk Warehouse, Lilycroft Road Bradford BD9 5BD
Registered office	Manningham Mills Community Centre The Silk Warehouse, Lilycroft Road Bradford BD9 5BD
Independent examiner	Alison Whalley FCA Naylor Wintersgill Limited Carlton House Grammar School Street Bradford BD1 4NS
Bankers	Unity Trust Bank P O Box 7193 Willenhall WV1 9DG  Barclays Bank Plc 10 Market Street Bradford BD1 1EG

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# **EQUALITY TOGETHER**

## **TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 MARCH 2021**

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The Trustees present their report and accounts for the year ended 31 March 2021.

2020/2021 has been yet another momentous year for the organisation. The board of trustees acknowledge the achievements made throughout what has been a very difficult and challenging year of service provision as Equality Together.

The board of trustees have overseen the ongoing performance of all services, ensuring that they are maintained and delivered to high standard through this period of considerable change as a result of very challenging circumstances as a result of Covid-19 and are fully satisfied by the quality of service and outcomes for service users.

The position at 31/03/2021 reflects a lot of hard work undertaken by the Senior Leadership Team, staff, volunteers and trustees to secure contracts into 2021/2022 and beyond. This has been as a result of an extremely focused and productive programme of service provision, delivery and cost savings. Our achievements reflect of our continuing commitment to partnership working with other like-minded organisations and agencies.

The charity is in a position to continue to deliver its activities during the coming year but recognise that a further significant programme of change will have to be developed and implemented to ensure the short to medium term sustainability of the organisation following the ongoing impact of Coronavirus COVID-19 which will be our main priority. The charity's assets are adequate to fulfil its obligations, although trustees are aware of the need to increase these to provide a stronger element of protection within the current economic climate.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the Charity's articles of association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)"

### **Objectives and activities**

#### **A Summary of the Objects of the Charity as set out in its Governing Document.**

- a. To provide the relief of all people, primarily those who live in the area of Yorkshire, who by reason of their disability, age, infirmity, sickness, social or economic circumstances, caring responsibilities, or who are socially excluded for other reasons, face barriers to accessing, or have a need of, health, social care or other related community services.
- b. To provide information, advice, support and training, which will enable those people to respond to issues of concern and interest directly related to their care or to help them meet their needs and participate more fully in society and more specifically within their local communities.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### **Public Benefit**

The Board of Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission in exercising their powers or duties.

The objective of the charity is to enable people with disabilities living in the Bradford Metropolitan District to achieve a high quality of life and to help them to help themselves to take up some of the same opportunities that non-disabled people have open to them in a modern and integrated society. We have achieved this by continuing to offer free high quality and professional advice and information on welfare benefits, equipment for the needs of daily living within the home, Blue Badge parking, transport issues, education, employment, sport and leisure facilities, housing, health services, volunteering and holiday planning. We assist disabled people, through the provision of information, signposting or advice/representation, to obtain their statutory rights and benefits, and to improve their opportunities and living standards. We have developed a website of useful information for disabled people in the Bradford District and ensure that our service remains free at the point of delivery. In so doing we have served the following charitable purposes described in the Charities Act 2011:

- The prevention or relief of poverty
- The advancement of health
- The relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage

### **Activities and Services**

At 31 March 2021 Equality Together employed fifteen paid workers and over thirty active volunteers.

1. Administration
2. Complex Needs Welfare Advice
  - Lot One Complex Needs Welfare Advice
  - Reaching Inequalities in City Welfare Advice
  - Annette Fox Leukaemia Research Fund
  - Disability Information & Advice
3. Self & Group Advocacy
  - Self- Empowered Support (Peer Support)
  - Group Advocacy (Voice)
4. Health & Wellbeing
  - Disabled Persons Holiday & Activities Project (until 31.01.21)
  - Holiday Project for Carers (until 31.01.21)
  - Alternatives to Respite "HoliBreak+" (as from 01.02.21)
  - Our Lives Our Way Bradford Innovation Fund Project (as from 09.08.2020)
5. Independent Living Services
  - Live, Well & Safe (Equipment Demonstration Centre)
  - Social Enterprise Project
  - Sensory Needs Project
6. Training
  - Certa Training Centre
7. Covid-19 Related Programmes
  - Keeping Neurodivergent People Connected Project
  - National Emergencies Trust (NET) Disabled People Organisations Funding (Regional Partner)
  - Disabled People Organisations Research Project – Regional Research Partner
  - Give Bradford COVID Infrastructure Funding – Equalities Project
8. The Role and Contribution of Volunteers

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### 1. Administration

- Staffed by two part time workers.
- a. Reception – is responsible for the operation and effective of running of the reception area, including all incoming telephone calls, providing effective first contact and support, volunteers also support the work of the reception team.
- b. Administration Support – a part time administration assistant was responsible for monitoring, compiling records, room hire, group advocacy and support to the Board of Trustees.

### 2. Complex Needs Welfare Advice

- Delivered by four full time welfare advice officers supported by volunteers.

#### a. Complex Needs Welfare Advice

Specialist and generalist advice about the wide range of state benefits available to disabled people or people with long term health conditions that come under the criteria of "Complex Needs" as defined within the commissioned contract with Bradford Metropolitan District Council (BMDC).

As a result of Covid-19, the service has had to be delivered remotely embracing digital platforms of web chat, WhatsApp & Zoom as well as telephone and email support and engagement with service users, engaging and supporting **3,038** individuals, generating **£1,456,519.19** of additional income.

#### b. Reaching Inequalities in City Welfare Advice Project

Specialist and generalist advice service in relation to benefits available to vulnerable people directly referred by the Community Connectors, operating fourteen (14) hours per week, this is a sub-contracted service via Bradford VCS Alliance funded by NHS England through Bradford City & Bradford District Clinical Commissioning Groups. Initially aimed to commence service delivery as from 01.04.20 but was delayed due to Covid-19 until 01.07.20.

To date the project has engaged and supported **213** individuals.

#### c. Annette Fox Leukaemia Research Fund Welfare Advice Project

Funded since January 2015, this dedicated project that provides patients suffering from Leukaemia or blood disorders, carers and their families, specialist and generalist advice in relation to benefits, grants and money advice.

The project in 2020/2021 has engaged and supported **495** individuals and generated **£885,030.20** of additional income.

#### d. The Disability Information & Advice Service

Provides both a signposting service to assist disabled people in finding help with reliable and reference checked support services throughout the district, as well as dedicated casework in relation to more focused issues within Health & Wellbeing.

#### e. Income Generated

##### *Equality Together*

Over the financial year of 2020/2021, Equality Together through provision within both Complex Needs Welfare Advice and The Annette Fox Leukaemia Research Fund Welfare Advice Projects have successfully supported individuals (disabled people and carers that come under the criteria of complex needs) from across the District of Bradford to gain over **£2,341,549.36** additional income.

##### *The Lot One Complex Needs Welfare Advice Consortia*

Partners including Age UK Bradford & District, Cancer Support Yorkshire, Citizens Advice Bradford & Airedale/Bradford Law Centre and Gillingham Advice & Training Centre have jointly supported clients from across the Metropolitan District of Bradford to gain over **£4,837,193.19** additional income within the financial year of 2020/2021.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### 3. Self & Group Advocacy

- Delivered by two part time senior workers, a part time support worker and supported by volunteers:

a. Self-Advocacy - Empowered Support (Peer Support)

Primarily delivered by disabled people for disabled people our "Peer Support Workers" who are "Peoples with Direct Lived Experience" have supported and empowered clients over the past twelve months that face many complex situations within life. This service provides each individual with six sessions in which clients are supported to identify and prioritise issues and concerns then through a focused empowered approach find long term solutions.

b. Group Advocacy

The team works with disabled people, carers and other people who use a variety of health, housing & social care services. We work with people, using community development principles so that they are able to influence the improvement and development of the services they use, often working together with partners from the statutory sector. We also support people to come together to work influence change and campaign around issues that are important to them.

The groups we currently work with and support include:

- 1, Bradford & District Disabled People's Forum
- 2, Service User Involvement Group for Bradford Council's Health & Wellbeing Services
- 3, Black Health Forum
- 4, Bradford Association of Visually Impaired People (BAVIP)

### 4. Health & Wellbeing

- Delivered by a part time project co-ordinator, a part time project support worker and supported by volunteers plus consortium partner organisations:

a. Disabled Persons Holiday and Recreational Support Service

Commissioned by Bradford Metropolitan District Council this service helps disabled people find and take accessible and appropriate holidays in the UK and abroad. Cases often involve significant planning, research and funding. Enquiries come from people with physical disabilities, mental health needs, learning disabilities and/or from the carers of such people. Funding is raised from charities and trusts to support disabled clients in taking holidays.

The service was de-commissioned as from 31.01.21

b. The Carers Holiday Scheme

This service was established as an extension of the Holiday and Recreational Support Scheme to ensure that carers also have opportunities to take appropriate breaks. The organisation has been commissioned by Bradford Metropolitan District Council to distribute grants on their behalf. Some carers do not have the time or are not well enough to organise a holiday and appreciate the practical support the scheme gives them. The scheme has been successful in reaching carers who look after people with a wide range of disabilities. As well as helping carers with holidays, the scheme also gives carers information about the availability of other services and benefits.

The scheme was de-commissioned as from 31.01.21

## EQUALITY TOGETHER

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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c. Alternative to Respite (HoliBreak+)

Commissioned by Bradford Metropolitan District Council for three years commencing as from 01.02.2021, replaces the previous two funded programmes of the "Disabled Peoples Holiday & Recreational Support Service and The Carers Holiday Project".

This our new venture sees a completely new and fresh approach to respite provision for carers and disabled people. Since the start of February, our team have been developing a comprehensive portfolio (database) of UK destinations, accommodation and activities which will provide choice for the individual. The delivery approach is a more a dedicated "Support Planning Service" that will enable individuals in receipt of a personal budget or NHS Continuing Care budget with an amount built in for Respite Care, or a self-funder to find either a holiday, short break, day trip or activity.

d. Our Lives Our Way (Bradford Innovation Fund Project)

Commissioned by Bradford Metropolitan District Council for three years commencing as from 09.08.2020, this programme sees Equality Together as the lead and accountable organisation of a consortia including Bradford People First (BPF), Bradford Talking Media (BTM) and People First Keighley & Craven (PFKC).

This new programme, provides a perfect opportunity for people with disabilities to work together in an innovative new group to be supported to make their own choices and shape what they would like to do. In which we offer more tailored opportunities or alternative activities supported by their personal budgets, part of this project is to support the individual with life skills coaching and confidence boosting.

We have 4 part time staff - each are disability trained and experienced programme workers who support people across the week using a mixture of 1 to 1 session's and within small working groups. Our approach is to use a varied range of accessible formats for people with lived experience of disability; in the aim of enabling them to explore their chosen areas of interest. Based upon previous findings from social worker surveys, could include employment opportunities- volunteering-social activities such as -cinema or socialisation, sporting activities- days out or clubs.

The opportunities are completely guided by the working groups, so this list is not exhaustive and are ultimately be steered by the wishes and wants of the participants.

Individuals are directly referred into the programme by social workers, each individual is assigned a dedicated programme to support their journey. As a result of COVID-19, all contact has been conducted remotely mostly via Zoom, both in terms of one-to-one support as well as the working groups.



## EQUALITY TOGETHER

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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#### 5. Live Well & Safe (Independent Living Service)

- Delivered by a part time occupational therapist, a part time sensory needs worker and supported by volunteers.

##### a. Equipment Demonstration Centre

The service provides an extensive range of aids, adaptations and equipment to support the needs of disabled people or individuals suffering with a long-term illness/condition enabling more self-independence and control within their own environment.

To support the needs of disabled people, individuals with long term illness/condition or professionals in gaining greater awareness of aids, adaptations and equipment that in turn will meet the needs of clients. "Gadget Roadshows" are booked to attend various community group meetings, events, exhibitions and conferences throughout the district, due to the ongoing impact of Covid-19, events have been attended digitally by members of the team.

##### b. Social Enterprise

Clients can see in action or trial physical or sensory needs aids, adaptations & equipment, purchases can be made via our own in-house sales team or signposted to another local dealer.

##### c. Sensory Needs Project

Commissioned by Bradford Metropolitan District Council this service empowers and enables partly sighted and hearing-impaired individuals by the provision of information, advice and signposting plus providing practical one to one support in regard to aids, adaptations and equipment in relation to "Sensory Needs".

#### 6. Training

- Delivered by one dedicated part time member of staff supported by volunteers:

##### a. Certa Training Centre

As a recognised and accredited training centre for Certa, Equality Together has been exploring new areas of accredited training programs that will develop the skills and knowledge of students which in turn will enhance their individual employability opportunities or raise their personal confidence and aspirations.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### 7. COVID-19 Related Programmes

- Delivered by both internal and external staff supported by volunteers:

a. Keeping Neurodivergent People Connected Project

NHS England funding to the value of £7,500 was gained, administered by Inclusion North to deliver an eight (8) week intensive programme of information, guidance and support in relation to Coronavirus COVID-19 to 420 clients that come under the criteria of "Neurodivergent" i.e., clients that have one of the following conditions:

- 1, Learning Disability
- 2, Autism
- 3, ADHD
- 4, Mental Health

The funding programme enabled contact to be made to 35 individual clients each week by a mode of communication that works for them i.e., telephone, text, WhatsApp, Facebook Messenger or Skype that works for them.

The project was a huge success, with fantastic feedback both from the service user and also Inclusion North on the take up of the project delivered by Equality Together.

b. National Emergencies Trust (NET) Disabled People Organisations Funding (Regional Partner)

£12,000 was secured by Equality Together to be the Regional Delivery Partner for West/North Yorkshire & The North East on behalf of ROFA and Inclusion London as part of the UK Alliance to identify, make contact and support other Disabled People Organisations (DPO's) to apply for funding from NET in relation to COVID within the following three programme areas: Income, Isolation & Independent Living.

As part of the process, we engaged with 56 DPO's from across the targeted areas of West & North Yorkshire and The North East that resulted in over £84,000 being awarded and £14,000 of this amount being awarded to 4 DPO's in Bradford.

c. Disabled People Organisations Research Project – Regional Research Partner

£5,400 was gained Equality Together to be the Regional Research Partner for West/North Yorkshire & The North East on behalf of Inclusion London as part of a national research programme funded by the National Lottery Community Fund, to undertake a focused research and engagement project to DPO's based within the targeted areas.

The project ended in February, which saw a number of focused virtually based engagement sessions taking place with stakeholders from various DPO's within West & North Yorkshire and The North East.

d. Give Bradford COVID Infrastructure Funding – Equalities

£24,965 gained by Equality Together as the lead and accountable organisation of a consortium of local based VCS organisations namely, CABAD, Equity Partnership & Racial Equality Network (REN) to support a six month programme of activities that in turn will support VCS organisations to undertake an audit and create an Equality & Diversity Framework combined with sector support and specialist training programmes being delivered in relation to "Reach & Engagement" with individuals within the 9 areas of protected characteristics and health inequalities by specialist organisations within BAME, LGBTQ+ and Disability/Long Term Health Conditions.

## **EQUALITY TOGETHER**

### **TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021**

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The project commenced delivery in mid-October that has seen:

Creation of the "Equality & Diversity Framework"

Partners and sub-contractors engaged

Front-line VCS organisations identified & contact made,

Direct engagement & support from CABAD Development

Workers to support and upskill VCS organisations to undertake  
the framework

Specialist organisations engaged with virtual training

programmes developed for delivery in March

The project delivered in March:

6 x Equality Act & Governance Virtual Training Programmes

6 x Accessible Information Virtual Training Programmes

6 x LGBTQ+IA Virtual Training Programmes

6 x BAME Awareness Virtual Training Programmes

Outcomes:

50 VCS Organisations Engaged

17 VCS Organisations completed the Equality & Diversity Framework

205 Frontline VCS Staff attended the Training Programmes

Project Monitoring Report completed and submitted

#### **8. The Role & Contribution of Volunteers**

- Delivered (overseen and co-ordinated) by one dedicated part time member of staff.

- a. Volunteers help make an appropriate and significant contribution to the work and service objectives of Equality Together (ET). They put their experience, knowledge and skills at our disposal, free of charge, with the primary aim of helping us achieve our service objectives and thereby bring benefit to the local community. Each volunteer has a role description, outlining specific tasks, responsibilities and reporting lines of the volunteer. All volunteers receive a planned induction to organisation and of the various services delivered within ET, regular supervision and support sessions, and positive feedback on their contribution. Volunteers lend support in many areas of the organisation's work: reception, welfare rights, and information services and within equipment demonstration centre. Dependent upon their requirements, they benefit from work experience in a busy office, training to most office skills, full travelling expenses, a pleasant and friendly team to work with, up to date PCs with word processing and database software, and the opportunity to contribute to a worthwhile cause.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### Achievements and performance

Over the past twelve months we have continued to deliver a core range of services combined with exploring new areas of development that in turn will support the aims of objectives of the charity as well as provide additional and needed forms of income. Throughout the year this was made very clear that without either additional new avenues of funding being secured or in year savings, we were at risk of not having sufficient resources to meet our obligations to staff and those who use the services we provide. This has again brought into sharp focus by the level of Public Sector cuts imposed on the Local Authority and NHS by the Government, and in the face of this ongoing economic climate resulting from Coronavirus COVID-19.

As reported within previous annual reports, one of our most long standing services in relation to Welfare Advice (benefits), Information & Advice, that saw a major program of change in terms of the changes to funding for advice across the Metropolitan District of Bradford in the summer of 2016, that resulted in a new contract being awarded for four years (totalling £1.1m equating to £264,000 per year) to Equality Together as the lead partner of a "Complex Needs Consortia" (specialising in disability & long term health conditions) and several partners Age UK Bradford & District (specialising in age), Citizens Advice Bradford & Airedale (specialising in mental health), Cancer Support Yorkshire (specialising in cancer) and Gillingham Advice & Training Centre (for specialist support to BAME communities) starting in January 2017.

As a result of ongoing financial pressures faced by the local authority the start of the new financial year (01.04.2020) saw a 20% reduction in funding to this project a loss of £52,800 that equates to over £24,000 for Equality Together and the potential of this funding coming to an end at 31.03.2021. Due to the ongoing impact and challenges of COVID-19, the local authority following funding gained from Government provided a 20% uplift to the programme for the final two quarters of 2020/2021 financial year plus provided some additional capital funding to support the purchase of new ICT equipment.

The Holiday and Activities Project is now in its 14th year and demand for the specialist service remains high. The number of requests for information without financial support has again risen, with the service providing a wide range of activities and trips combined with providing additional support through signposting to other internal and external service providers based throughout the district.

The Holiday Project for Carers now in its 14th and final year of operation was as popular as ever. Grants of up to £300 are made available to enable Carers to take a break and we over achieved our target by providing **(150)** breaks a year for people from across the district.

In the autumn of 2019, we were informed by the local authority of the intention to merge both "Disabled People Holiday & Recreational Support Service" and "The Carers Holiday Project" into a new programme entitled "Alternative to Respite Provision" that would go out to tender in early 2020, in the aim to go live as from 1st July 2020, due to the impact and challenges of COVID-19, the procurement process was delayed, being awarded in the late Autumn of 2020 to our organisation commencing service delivery as from 1st February 2021. This new project does not include a grant facility for carers but provides a more self-empowered programme of individual choice and control in relation to holidays and activities in preparation for the formal launch of the Individual Social Fund (ISF), expansion of direct payments and self-funders.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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Live Well & Safe Project (The Independent Living “Equipment Demonstration Centre”) supports both disabled people and professionals, many come to the centre and attend our ‘open days’ these are very popular and well attended. A wide variety of products can be demonstrated and made available for sale, or arrangements made with ‘retailers’ to supply directly to the disabled person. The Service offers volunteers, many of whom are themselves disabled, opportunities to train and improve their skills, which for some provides a route back into employment.

In the autumn of 2017, Equality Together in partnership with Bradford People First and People First Keighley & Craven submitted and were successful in winning the Lot Two Non-Statutory Self & Group Advocacy Service commissioned by Bradford Metropolitan District Council (BMDC) to commence service delivery as from 1st April 2018 until 31st March 2021, total value of £484,481.88 equating to £161,493.96 per annum, Equality Together is the lead partner of the partnership. The contract saw a slight funding uplift of £6,993.77 to £168,487.73 per annum an extension of the contract to 31.03.2022.

Through our third year of service delivery within Non-Statutory Self & Group Advocacy partners have been working with the Commissioning Team of Bradford Metropolitan District Council to develop the offer across the Metropolitan District of Bradford in the provision of a “People Centred Approach” to both self and group empowered support for clients facing issues and problems within daily life.

The profile of Equality Together is raised through the further development of all services within the organisation but also via networking in attending, supporting and leading various virtual events throughout the year in relation to our core operations and also in the City’s response to COVID-19.

Client satisfaction and feedback is vital to the ongoing provision of services ensuring that they both meet the expectations of service users but are people centred. Feedback forms and surveys are sent to all our clients (service users), that highlights that the vast majority of our clients were more than happy with the service provided, across all departments and services delivered. No clients expressed dissatisfaction with the service. **5%** were very satisfied and **95%** fairly satisfied. The majority of our clients found that the information they received was easy to understand and that we were good at keeping them informed of progress. When asked if they would recommend our services to other people **90%** of clients said they were certain to, and **10%** said they were likely to.

We continue (subject to funding constraints) to distribute publicity leaflets to all clients, statutory service providers (local authority) community resource facilities, care homes, GP surgeries, hospitals, pharmacists, NHS Direct, local support groups and organisations.

We have an interactive website, (including webchat) which can be viewed, we can also be followed on social media i.e., Facebook, Instagram & Twitter: -

Website (including web chat: <https://www.equalitytogether.org.uk>)

Facebook: <https://www.facebook.com/equalitytogether>

Instagram: <https://instagram.com/equalitytogetherbradford>

Twitter: <https://www.twitter.com/EqualityTo>

### Fundraising

Section 162a of the Charities Act 2011 requires charities to make a statement regarding fundraising activities. The legislation defines fundraising as ‘soliciting or otherwise procuring money or other property for charitable purposes’. The charity does not actively raise funds from the public either directly or via use of an agent, accordingly no such amounts are presented in the financial statements for the year under review. The charity has received no complaints in relation to fundraising activity for the year under review.

Given the nature of the funding of the charity the Trustees consider that it remains appropriate not to be voluntarily bound to be regulated by the Fundraising Regulator.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### Financial review

#### ***Policies on Reserves***

The Board of Trustees consider that they should review the level of reserves held by the charity at regular intervals. The charity's unrestricted free reserves, which have not been designated for specific use, stood at £4,608. The Board of Trustees feel that reserves should equate to approximately four months running costs, currently £286,000, to ensure that adequate resources are available to allow continued furtherance of the objects of the charity in the event of temporary shortfall in incoming resources while alternative funds are sought. The management committee believe that holding adequate funds to cover four months operating costs would allow for an orderly winding up of the organisation and would also enable the organisation to be able to meet its obligations towards staff and creditors in the event of there being no possibility of securing alternative longer-term funding. The current reserves fall short of this target.

The reserves policy will be reviewed upon an annual basis as part of our ongoing due diligence process.

#### ***Availability and adequacy of assets of each of the funds***

The board of trustees is satisfied that the charity's assets in each fund are available and adequate to fulfil its obligations in respect of each fund.

#### ***Principal funding sources and how expenditure in the year under review has supported the key objectives of the charity***

The main sources of income have been from Bradford Metropolitan District Council and from Bradford City & Bradford District Clinical Commissioning Groups (NHS). The charity also received/used funding from a number of independent charitable trusts. It also generated its own income, principally through small equipment sales and wheelchair hire.

#### ***Transactions and Financial position***

The financial statements are set out on pages 17-37. The financial statements have been prepared implementing the 2005 Revision of the Statement of Recommended Practice for Accounting and Reporting by Charities issued by the Charity Commission for England and Wales (revised in October 2019).

The Statement of Financial Activities shows a total incoming resource of £846,136 (2020 £656,638) and a total resources expended of £859,772 (2020 £653,881), resulting in a deficit for the year of £13,636 (2020 - £2,757 surplus).

The total reserves at the year-end stand at £64,793 (2020 - £78,429).

Free unrestricted, undesignated reserves amounted to £4,608 (2020 - £17,764)

Designated funds amounted to £21,785 (2020 - £18,767).

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### Plans for Future Periods

To focus on stabilising, maintaining and sustaining the different elements within our organisation combined with exploring and gaining new areas of income generation to ensure our short to medium term sustainability, is our major priority for the coming year.

To review all staff roles, responsibilities and hours of work in order to ensure that we have the most effective organisational, management and project delivery structures in place to guide, lead and sustain the organisation for the future. This will be achieved within the income resources available to the organisation.

A key aspect of that focus will be on maintaining and creatively sustaining the key strands of our service provision in order to respond to the needs and aspirations of those we serve.

As a disabled peoples user led organisation, we will continue to seek out and work with like-minded organisations (locally, regionally and nationally) who share our commitment to empowering those people who face barriers, to challenge, overcome and remove barriers. We recognise that in the current economic and commissioning climate there is strength in seeking to create and sustain meaningful partnerships with like-minded organisations.

We will continue to grow our knowledge of the “lived experience” of disability and a ‘volunteer’ base of people with such experience, in order to better ensure that the service we provide, the people and organisations we see to influence reflect and respond to that “experience”.

We will continue to work in partnership with partners and other like-minded organisations, to influence and develop choice and control for disabled people in all aspects of their lives.

We will continue to work with and in partnership other information and advice lead providers, and in particular the Complex Needs Advice Consortia, in order to ensure that we contribute full to the district having the most costs effective and efficient Information and Advice Service as possible for the overall benefit of the citizens of our district and for the specific benefit of those citizens who need that advice because of their disability.

We will continue to work with our partners and other providers in relation to “Advocacy”, in order to ensure that we contribute fully to the District having the most cost effective and efficient Non Statutory Self & Group Advocacy Service, that in turn will benefit the citizens of our district through the provision of empowered support (prioritising issues, developing solutions and outcomes) and user voice (ensuring that key issues facing those people facing barriers within their lives are highlighted and brought to the attention of those who can make a difference).

We will review and were possible further strengthen our “outreach strategy” (subject to Covid-19 restrictions) and promote collaborative working through attendance at community events, community centres in conjunction with other local third sector providers of similar services. This in turn will link into and address priorities of both Bradford Metropolitan District Council (BMDC) and the Clinical Commissioning Groups (CCGs) within the area.

We will continue to grow and develop our role as a social enterprise to generate income through equipment sales, both on line and within the demonstration centre(s), arrangements with retailers and any other saleable services to the benefit of disabled people combined.

We will explore new avenues of income generation in regard to Conferencing & Hospitality and Supported Care to support the future sustainability of the organisation.

We will continue to grow and develop partnerships with commissioners and third sector partners and support groups to embrace the principles of “first contact & triage” in order to provide “holistic” responses to people’s needs.

# EQUALITY TOGETHER

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

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### Structure, governance and management

The Charity is a company limited by guarantee and registered with the Charity Commission. The charitable company is governed by its articles of association dated 31 July 1987 and updated 6 July 2015.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Gill Bowskill - Chair

Andrew Ward - Treasurer

Alvin Adey - Vice Chair

Jenny Scott

Lynn Asquith

Joanne Bolland (Appointed 7 October 2020)

Mohinder Singh Chana (Appointed 5 November 2020)

Natalie Jovanovic (Appointed 7 January 2021)

Balu Iad (Appointed 5 November 2020)

Mathew Ward (Appointed 5 November 2020)

At each Annual General Meeting one third of the management committee retire by rotation and subject to eligibility may be re-elected.

None of the members of the board has any beneficial interest in the company. All of the members of the management committee are members of the company and guarantee to contribute £1 in the event of a winding up.

Indemnity insurance has been taken out during the year and is included in the insurance costs.

It is the Charity's aim to have a balanced board both in terms of skills and experience and also being representative of the client group using the service. It is the policy to have at least 51% of members with disabilities. This then informs recruitment to the board in terms of where and how the charity should advertise. The charity has a formal process for the recruitment, appointment and training of management committee members.

Overall responsibility for the running of the service lies with the Trustee Board, a body of no less than four and no more than twelve people, the majority of whom must have some form of disability. The Board of Trustees sets policy and direction for the organisation and meets bi-monthly. Urgent decisions can be taken by the Executive Sub Group (a sub group of the Board of Trustees, made up of Chair, Vice-Chair and Treasurer), which can meet at short notice when urgent decisions are required. Any action taken by this 'executive' committee must be reported to the full Trustee Board at the earliest opportunity.



## EQUALITY TOGETHER

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) *FOR THE YEAR ENDED 31 MARCH 2021*

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To support the smooth running of the organisation, two sub boards meet upon a bi-monthly basis in order to be able to consider in detail and comment on both the performance and financial position of the organisation:

- The Development & Performance Sub Board was chaired by Alvin Adey
- The Finance & Resources Sub Board was chaired by Andrew Ward

This model of operation will be maintained as part of the governance structure of Equality Together.

The CEO is responsible for all aspects of the day-to-day operational delivery and strategic development of the organisation, supported in turn by the Operations Manager and Finance Manager forming the Senior Leadership Team (SLT).

- Mark Nicholson, Chief Executive Officer
- Jill Griffiths, Operations Manager
- Christopher Elliott, Finance Manager

The Board of Trustees as part of its business has conducted its own risk review of the major risks to which the charity is exposed and is satisfied that systems are in place to minimise those risks.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime under the Companies Act 2006.

The Trustees' report was approved by the Board of Trustees.

DocuSigned by:  
  
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**Gill Bowskill - Chair**  
Trustee  
Dated: 23 September 2021

# **EQUALITY TOGETHER**

## **STATEMENT OF TRUSTEES' RESPONSIBILITIES**

### ***FOR THE YEAR ENDED 31 MARCH 2021***

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The Trustees, who are also the directors of Equality Together for the purpose of company law, are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in operation.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

# EQUALITY TOGETHER

## INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF EQUALITY TOGETHER

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I report on the financial statements of the Charity for the year ended 31 March 2021, which are set out on pages 17 to 36.

### Respective responsibilities of Trustees and examiner

The Charity's Trustees, who are also the directors of Equality Together for the purposes of company law, are responsible for the preparation of the financial statements. The Trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination being a qualified member of member of the Institute of Chartered Accountants in England and Wales.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- (iii) to state whether particular matters have come to my attention.

### Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

### Independent examiner's statement

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
  - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
  - (ii) to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities;
 have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

DocuSigned by:

*Alison Whalley*

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Alison Whalley

Naylor Wintersgill Limited

Carlton House  
Grammar School Street  
Bradford  
BD1 4NS

Dated: 23 September 2021

# EQUALITY TOGETHER

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH 2021

		Unrestricted funds 2021 £	Restricted funds 2021 £	Total 2021 £	Unrestricted funds 2020 £	Restricted funds 2020 £	Total 2020 £
Notes							
<b><u>Income and endowments from:</u></b>							
Donations and legacies	3	43,591	13,200	56,791	11	26,059	26,070
Charitable activities	4	13,320	774,664	787,984	7,497	600,691	608,188
Other trading activities	5	875	-	875	11,984	-	11,984
Investments	6	-	-	-	534	-	534
Other income	7	486	-	486	9,862	-	9,862
<b>Total income</b>		<b>58,272</b>	<b>787,864</b>	<b>846,136</b>	<b>29,888</b>	<b>626,750</b>	<b>656,638</b>
<b><u>Expenditure on:</u></b>							
Charitable activities	8	59,668	800,104	859,772	58,194	595,687	653,881
<b>Net (outgoing)/ incoming resources before transfers</b>		<b>(1,396)</b>	<b>(12,240)</b>	<b>(13,636)</b>	<b>(28,306)</b>	<b>31,063</b>	<b>2,757</b>
Gross transfers between funds		(8,742)	8,742	-	-	-	-
<b>Net (expenditure)/income for the year/ Net movement in funds</b>		<b>(10,138)</b>	<b>(3,498)</b>	<b>(13,636)</b>	<b>(28,306)</b>	<b>31,063</b>	<b>2,757</b>
Fund balances at 1 April 2020		36,531	41,898	78,429	64,837	10,835	75,672
<b>Fund balances at 31 March 2021</b>		<b>26,393</b>	<b>38,400</b>	<b>64,793</b>	<b>36,531</b>	<b>41,898</b>	<b>78,429</b>

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# EQUALITY TOGETHER

## BALANCE SHEET

**AS AT 31 MARCH 2021**

	Notes	2021 £	£	2020 £	£
<b>Fixed assets</b>					
Tangible assets	13		20,451		6,888
<b>Current assets</b>					
Stocks	14	6,500		6,138	
Debtors	15	85,721		62,692	
Cash at bank and in hand		135,402		61,752	
		<u>227,623</u>		<u>130,582</u>	
<b>Creditors: amounts falling due within one year</b>	16	<u>(183,281)</u>		<u>(59,041)</u>	
Net current assets			44,342		71,541
<b>Total assets less current liabilities</b>			<u>64,793</u>		<u>78,429</u>
<b>Income funds</b>					
Restricted funds	18		38,400		41,898
<u>Unrestricted funds</u>					
Designated funds	19	21,785		18,767	
General unrestricted funds		<u>4,608</u>		<u>17,764</u>	
			26,393		36,531
			<u>64,793</u>		<u>78,429</u>

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2021.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 23 September 2021

Gill Bowskill - Chair  
Trustee

DocuSigned by:  
  
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Company Registration No. 02221536

# EQUALITY TOGETHER

## STATEMENT OF CASH FLOWS

**FOR THE YEAR ENDED 31 MARCH 2021**

	Notes	2021 £	£	2020 £	£
<b>Cash flows from operating activities</b>					
Cash generated from/(absorbed by) operations	24		91,074		(22,743)
<b>Investing activities</b>					
Purchase of tangible fixed assets		(17,424)		(7,375)	
Investment income received		-		534	
<b>Net cash used in investing activities</b>			(17,424)		(6,841)
<b>Net cash used in financing activities</b>			-		-
<b>Net increase/(decrease) in cash and cash equivalents</b>			73,650		(29,584)
Cash and cash equivalents at beginning of year			61,752		91,336
<b>Cash and cash equivalents at end of year</b>			135,402		61,752

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS

### FOR THE YEAR ENDED 31 MARCH 2021

---

#### 1 Accounting policies

##### Charity information

Equality Together is a private company limited by guarantee incorporated in England and Wales. The registered office is Manningham Mills Community Centre, Lilycroft Road, Bradford, BD9 5BD.

#### 1.1 Accounting convention

The financial statements have been prepared in accordance with the Charity's [governing document], the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)". The Charity is a Public Benefit Entity as defined by FRS 102.

The financial statements are prepared in sterling, which is the functional currency of the Charity. Monetary amounts in these financial statements are rounded to the nearest £.

The accounts have been prepared on the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the accounts, the Trustees, having considered agreed and expected funding, the ever changing economic climate and the Covid-19 pandemic, have a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the accounts.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the Charity.

#### 1.4 Incoming resources

Income is recognised when the Charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the Charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the Charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2021

#### 1 Accounting policies

(Continued)

##### 1.5 Resources expended

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them. Support costs include central functions and are allocated to activity cost categories on a basis of employee hours split between the funds.

Grants payable are payments made to third parties in the furtherance of the charitable objectives. Where the charity gives a grant with conditions for its payment being a specific level of service or output to be provided, such grants are only recognised in the Statement of Financial Activities once the recipient of the grant has provided the specific service or output.

Grants payable without performance conditions are only recognised in the accounts when a commitment has been made and there are no conditions to be met relating to the grant which remain in the control of the charity.

Provisions for grants are made when the intention to make a grant has been communicated to the recipient but there is uncertainty about either the timing of the grant or the amount of grant payable.

##### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Fixtures and fittings	25% straight line
-----------------------	-------------------

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in net income/(expenditure) for the year.

##### 1.7 Impairment of fixed assets

At each reporting end date, the Charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

##### 1.8 Stocks

Stocks are stated at the lower of cost and estimated selling price less costs to complete and sell. Cost comprises direct materials and, where applicable, direct labour costs and those overheads that have been incurred in bringing the stocks to their present location and condition. Items held for distribution at no or nominal consideration are measured the lower of replacement cost and cost.

Net realisable value is the estimated selling price less all estimated costs of completion and costs to be incurred in marketing, selling and distribution.



# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 1 Accounting policies

(Continued)

#### 1.9 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

#### 1.10 Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the Charity's balance sheet when the Charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

#### 1.11 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

#### 1.12 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due. Pension costs are allocated between funds based on employee hours.

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

---

### 1 Accounting policies

(Continued)

#### 1.13 Leases

Rentals payable under operating leases, including any lease incentives received, are charged as an expense on a straight line basis over the term of the relevant lease.

### 2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 3 Donations and legacies

	Unrestricted funds	Restricted funds	Total Unrestricted funds	Restricted funds	Total
	2021 £	2021 £	2021 £	2020 £	2020 £
Donations and gifts	11,344	-	11,344	11	4,696
Grants	32,247	13,200	45,447	-	21,363
	<u>43,591</u>	<u>13,200</u>	<u>56,791</u>	<u>11</u>	<u>26,059</u>
	<u><u>43,591</u></u>	<u><u>13,200</u></u>	<u><u>56,791</u></u>	<u><u>11</u></u>	<u><u>26,059</u></u>
<b>Grants receivable for core activities</b>					
Bradford Metropolitan District Council	10,000	-	10,000	-	-
Annette Fox Leukaemia Research Fund	-	700	700	-	-
Community Action Hale	-	5,000	5,000	-	3,750
	-	-	-	-	10,000
Other grants for individual support	-	-	-	-	7,613
Access to Work	2,247	-	2,247	-	-
Inclusion North	-	7,500	7,500	-	-
Power to Change	20,000	-	20,000	-	-
	<u>32,247</u>	<u>13,200</u>	<u>45,447</u>	<u>-</u>	<u>21,363</u>
	<u><u>32,247</u></u>	<u><u>13,200</u></u>	<u><u>45,447</u></u>	<u><u>-</u></u>	<u><u>21,363</u></u>

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2021

#### 4 Charitable activities

	Disability Advice and Information	Disability Equipment	Disability Holidays	Self and Group Advocacy	Total	Disability Advice and Information	Disability Equipment	Disability Holidays	Self and Group Advocacy	Total
	2021	2021	2021	2021	2021	2020	2020	2020	2020	2020
	£	£	£	£	£	£	£	£	£	£
Sale of goods and services	-	13,129	-	-	13,129	-	6,021	-	-	6,021
Grants	444,400	128,135	33,737	168,392	774,664	319,264	25,000	94,932	161,495	600,691
Primary purpose trading	-	191	-	-	191	-	1,476	-	-	1,476
	<u>444,400</u>	<u>141,455</u>	<u>33,737</u>	<u>168,392</u>	<u>787,984</u>	<u>319,264</u>	<u>32,497</u>	<u>94,932</u>	<u>161,495</u>	<u>608,188</u>
Analysis by fund										
Unrestricted funds	-	13,320	-	-	13,320	-	7,497	-	-	7,497
Restricted funds	444,400	128,135	33,737	168,392	774,664	319,264	25,000	94,932	161,495	600,691
	<u>444,400</u>	<u>141,455</u>	<u>33,737</u>	<u>168,392</u>	<u>787,984</u>	<u>319,264</u>	<u>32,497</u>	<u>94,932</u>	<u>161,495</u>	<u>608,188</u>

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2021

#### 4 Charitable activities

(Continued)

##### Performance related grants

Bradford Metropolitan District Council	289,277	-	33,737	168,392	491,406	283,672	25,000	94,932	161,495	565,099
Annette Fox Leukemia Research Fund	29,092	-	-	-	29,092	35,592	-	-	-	35,592
BMDC Innovation	80,000	-	-	-	80,000	-	-	-	-	-
CCG Clicks	17,024	-	-	-	17,024	-	-	-	-	-
BMDC Live Well and Safe	6,873	-	-	-	6,873	-	-	-	-	-
Cancer Support Yorkshire	6,500	-	-	-	6,500	-	-	-	-	-
BMDC Alternative to Respite Care	15,634	-	-	-	15,634	-	-	-	-	-
Community Action	-	6,000	-	-	6,000	-	-	-	-	-
Leeds Community Foundation	-	24,965	-	-	24,965	-	-	-	-	-
Stronger Communities	-	80,170	-	-	80,170	-	-	-	-	-
Inclusion London	-	17,000	-	-	17,000	-	-	-	-	-
	<u>444,400</u>	<u>128,135</u>	<u>33,737</u>	<u>168,392</u>	<u>774,664</u>	<u>319,264</u>	<u>25,000</u>	<u>94,932</u>	<u>161,495</u>	<u>600,691</u>

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 5 Other trading activities

	Unrestricted funds	Unrestricted funds
	2021 £	2020 £
Room hire	875	11,984

### 6 Investments

	Unrestricted funds	Unrestricted funds
	2021 £	2020 £
Interest receivable	-	534

### 7 Other income

	Unrestricted funds	Total and Unrestricted funds
	2021 £	2020 £
Other income	486	9,862

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2021

#### 8 Charitable activities

	Disability Advice and Information 2021 £	Disability Equipment 2021 £	Disability Holidays 2021 £	Self and Group Advocacy 2021 £	Total 2021 £	Disability Advice and Information 2020 £	Disability Equipment 2020 £	Disability Holidays 2020 £	Self and Group Advocacy 2020 £	Total 2020 £
Staff costs	136,542	10,004	22,975	33,974	203,495	98,625	9,780	23,802	28,370	160,577
Other staff costs	1,280	-	-	375	1,655	636	-	4,082	-	4,718
Volunteer costs	-	-	-	42	42	649	14	-	1,829	2,492
Project delivery	93,974	-	-	7,062	101,036	13,503	-	6,170	3,656	23,329
Consortium payments	200,047	-	-	105,188	305,235	155,992	-	-	97,500	253,492
Purchases	-	282	-	-	282	216	4,895	-	-	5,111
Grants payable	-	-	14,099	-	14,099	-	-	21,554	-	21,554
	<u>431,843</u>	<u>10,286</u>	<u>37,074</u>	<u>146,641</u>	<u>625,844</u>	<u>269,621</u>	<u>14,689</u>	<u>55,608</u>	<u>131,355</u>	<u>471,273</u>
Share of support costs (see note 9)	172,404	6,702	11,248	20,562	210,916	144,618	5,075	9,312	9,750	168,755
Share of governance costs (see note 9)	22,360	142	-	510	23,012	9,151	795	2,318	1,589	13,853
	<u>626,607</u>	<u>17,130</u>	<u>48,322</u>	<u>167,713</u>	<u>859,772</u>	<u>423,390</u>	<u>20,559</u>	<u>67,238</u>	<u>142,694</u>	<u>653,881</u>
<b>Analysis by fund</b>										
Unrestricted funds	58,565	1,103	-	-	59,668	57,978	216	-	-	58,194
Restricted funds	568,042	16,027	48,322	167,713	800,104	365,412	20,343	67,238	142,694	595,687
	<u>626,607</u>	<u>17,130</u>	<u>48,322</u>	<u>167,713</u>	<u>859,772</u>	<u>423,390</u>	<u>20,559</u>	<u>67,238</u>	<u>142,694</u>	<u>653,881</u>

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 9 Support costs

	Support costs	Governance costs	2021	Support costs	Governance costs	2020
	£	£	£	£	£	£
Staff costs	100,918	-	100,918	76,122	-	76,122
Depreciation	3,861	-	3,861	1,132	-	1,132
Establishment costs	58,383	-	58,383	51,942	-	51,942
Office costs	34,730	-	34,730	25,613	-	25,613
Travel	12	-	12	611	-	611
Sundry	1,952	-	1,952	2,026	-	2,026
Advertising and publicity	472	-	472	1,168	-	1,168
Bank charges	374	-	374	761	-	761
Professional fees	9,739	-	9,739	8,737	-	8,737
Room hire and meeting costs	475	-	475	643	-	643
Independent examiners fees	-	3,000	3,000	-	3,750	3,750
Accountancy and payroll	-	20,012	20,012	-	9,345	9,345
Trustees expenses	-	-	-	-	758	758
	<u>210,916</u>	<u>23,012</u>	<u>233,928</u>	<u>168,755</u>	<u>13,853</u>	<u>182,608</u>
Analysed between						
Charitable activities	<u>210,916</u>	<u>23,012</u>	<u>233,928</u>	<u>168,755</u>	<u>13,853</u>	<u>182,608</u>

Support costs are allocated based on number of staff hours per activity.

### 10 Trustees

None of the trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the current or previous year. 0 (2020: 2) trustees were reimbursed travel expenses totalling £nil (2020: £758) during the year.



# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 11 Employees

#### Number of employees

The average monthly number of employees during the year was:

	2021 Number	2020 Number
Charitable activities	10	10
Management and administration	4	4
	<u>14</u>	<u>14</u>

#### Employment costs

	2021 £	2020 £
Wages and salaries	282,076	219,484
Social security costs	17,682	13,412
Other pension costs	4,655	3,803
	<u>304,413</u>	<u>236,699</u>

During the year redundancy costs of £nil were incurred for one employees (2020 - £4,082, one employee). The redundancy costs were limited to those that the Charity was legally obliged to pay.

There were no employees whose annual remuneration was £60,000 or more during the current or prior year.

### 12 Taxation

As a charity the company is exempt from tax on income falling within part II of the Corporation Tax Act 2010 and on gains falling within s256 of the Taxation of Chargeable Gains Act 1992 to the extent that these are applied to its charitable objectives. No tax charges have arisen in the charity.

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 13 Tangible fixed assets

	Fixtures and fittings £
<b>Cost</b>	
At 1 April 2020	39,997
Additions	17,424
Disposals	(23,451)
	<u>33,970</u>
At 31 March 2021	<u>33,970</u>
<b>Depreciation and impairment</b>	
At 1 April 2020	33,109
Depreciation charged in the year	3,861
Eliminated in respect of disposals	(23,451)
	<u>13,519</u>
At 31 March 2021	<u>13,519</u>
<b>Carrying amount</b>	
At 31 March 2021	<u>20,451</u>
At 31 March 2020	<u>6,888</u>

### 14 Stocks

	2021 £	2020 £
Finished goods and goods for resale	6,500	6,138
	<u>6,500</u>	<u>6,138</u>

### 15 Debtors

	2021 £	2020 £
<b>Amounts falling due within one year:</b>		
Trade debtors	58,468	39,499
Other debtors	2,000	3,000
Prepayments and accrued income	25,253	20,193
	<u>85,721</u>	<u>62,692</u>

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 16 Creditors: amounts falling due within one year

	2021 £	2020 £
Other taxation and social security	5,767	4,125
Trade creditors	75,222	34,423
Other creditors	453	3,121
Accruals and deferred income	101,839	17,372
	<u>183,281</u>	<u>59,041</u>

### 17 Retirement benefit schemes

#### Defined contribution schemes

The Charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the Charity in an independently administered fund.

The charge to profit and loss in respect of defined contribution schemes was £4,655 (2020: £3,803).

Contributions totalling £nil (2020: £869) were payable to the scheme at the year end and are included in creditors.

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2021

#### 18 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds			Movement in funds				
	Balance at 1 April 2019	Incoming resources	Resources expended	Balance at 1 April 2020	Incoming resources	Resources expended	Transfers	Balance at 31 March 2021
	£	£	£	£	£	£	£	£
BMDC Advice and information	-	274,791	(274,791)	-	251,540	(260,282)	8,742	-
BMDC Signposter	-	13,250	(13,250)	-	13,246	(13,246)	-	-
Annette Fox Leukaemia Trust	-	35,592	(35,592)	-	29,792	(30,654)	-	(862)
Cancer Support Yorkshire	-	5,000	(5,000)	-	6,500	(6,500)	-	-
Disabled toilet	3,500	-	-	3,500	-	(1,330)	-	2,170
YBS - I pads capitalised	2,000	-	(295)	1,705	-	(540)	-	1,165
COVID Community Champions	-	-	-	-	80,170	(80,170)	-	-
Reaching Inequalities in City - Clicks Welfare Advice	-	-	-	-	17,024	(17,024)	-	-
Holiday and individual support	-	5,267	(5,017)	250	-	(250)	-	-
BMDC Innovation for User Led Organisations	-	-	-	-	80,000	(59,875)	-	20,125
BMDC Alternative to Respite Care	-	-	-	-	15,633	(10,702)	-	4,931
Net DPO Covid Funding Project	-	-	-	-	12,000	(12,000)	-	-
Give Bradford Covid-19 Strategic Infrastructure Project	-	-	-	-	24,965	(24,965)	-	-
NLCF DPO Research Project	-	-	-	-	5,000	(5,000)	-	-
CABAD Test and Trace Community Engagement	-	-	-	-	6,000	(6,000)	-	-
Bradford MDC - Live Well and Safe	-	6,873	(50)	6,823	6,873	(2,825)	-	10,871
Disability equipment	998	24,500	(25,498)	-	-	-	-	-
Holiday Recreation Scheme	-	18,950	(18,950)	-	-	-	-	-
Carers Holiday fund	4,337	76,032	(67,369)	13,000	33,737	(46,737)	-	-
Keeping Neurodivergent People Connected	-	-	-	-	7,500	(7,500)	-	-
Self and Advocacy	-	161,495	(144,875)	16,620	168,392	(185,012)	-	-
Bradford MDC -Live Well and Safe (Sensory)	-	-	-	-	24,492	(24,492)	-	-
BISON	-	5,000	(5,000)	-	5,000	(5,000)	-	-
	<u>10,835</u>	<u>626,750</u>	<u>(595,687)</u>	<u>41,898</u>	<u>787,864</u>	<u>(800,104)</u>	<u>-</u>	<u>38,400</u>

Activities and services as described in the title of the fund.

Expenditure from the Annette Fox Leukaemia Trust fund has exceeded income by £862. funds are expected in the year ended 31 March 2022 to cover the deficit.

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 19 Designated funds

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2019	Expenditure	Transfers	Balance at 1 April 2020	Transfers	Balance at 31 March 2021
	£	£	£	£	£	£
Fixed Asset Fund	645	-	4,538	5,183	14,102	19,285
Redundancy	15,166	(4,082)	-	11,084	(11,084)	-
Memorial fund	-	-	2,500	2,500	-	2,500
	<u>15,811</u>	<u>(4,082)</u>	<u>7,038</u>	<u>18,767</u>	<u>3,018</u>	<u>21,785</u>

The designated Fixed Asset Fund relates to the value of the fixed assets held by the Charity and will reduce with depreciation.

The Redundancy fund is a contingency fund in case of the unexpected loss of funding. A transfer has been made during the year to general funds.

The Hardship and Memorial funds are provide small grants to disabled people and carers in hardship.

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 MARCH 2021

#### 20 Funds

	Balance at 1 April 2019	Movement in funds			Balance at 1 April 2020	Movement in funds			Balance at 31 March 2021
	£	Income	Expenditure	Transfers	£	Income	Expenditure	Transfers	£
		£	£	£	£	£	£	£	£
Restricted Funds	10,835	626,750	(595,687)		41,898	787,864	(800,104)	8,742	38,400
Designated Funds	15,811	-	(4,082)	7,038	18,767	-	-	3,018	21,785
General Funds	49,026	29,888	(54,112)	(7,038)	17,764	58,272	(59,668)	(11,760)	4,608
	<u>75,672</u>	<u>656,638</u>	<u>(653,881)</u>	<u>-</u>	<u>78,429</u>	<u>846,136</u>	<u>(859,772)</u>	<u>-</u>	<u>64,793</u>

#### 21 Analysis of net assets between funds

	General funds 2021 £	Designated funds 2021 £	Restricted funds 2021 £	Total 2021 £	General funds 2020 £	Designated funds 2020 £	Restricted funds 2020 £	Total 2020 £
Fund balances at 31 March 2021 are represented by:								
Tangible assets	-	19,285	1,166	20,451	-	5,183	1,705	6,888
Current assets/(liabilities)	4,608	2,500	37,234	44,342	17,764	13,584	40,193	71,541
	<u>4,608</u>	<u>21,785</u>	<u>38,400</u>	<u>64,793</u>	<u>17,764</u>	<u>18,767</u>	<u>41,898</u>	<u>78,429</u>

# EQUALITY TOGETHER

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2021

### 22 Operating lease commitments

During the year the charity made payments under non-cancellable operating leases of £18,720 (2019; £18,716). At the reporting end date the Charity had outstanding commitments for future minimum lease payments under non-cancellable operating leases, which fall due as follows:

	2021 £	2020 £
Within one year	16,000	16,000
Between two and five years	40,000	8,000
In over five years	60,000	-
	<u>116,000</u>	<u>24,000</u>

### 23 Related party transactions

#### Remuneration of key management personnel

The remuneration of key management personnel is as follows.

	2021 £	2020 £
Aggregate compensation	<u>62,597</u>	<u>61,132</u>

There were no further related party transactions which require disclosure (2019 None).

### 24 Cash generated from operations

	2021 £	2020 £
(Deficit)/surplus for the year	(13,636)	2,757
Adjustments for:		
Investment income recognised in statement of financial activities	-	(534)
Depreciation and impairment of tangible fixed assets	3,861	1,132
Movements in working capital:		
(Increase)/decrease in stocks	(362)	200
(Increase) in debtors	(23,029)	(9,862)
Increase/(decrease) in creditors	124,240	(16,436)
<b>Cash generated from/(absorbed by) operations</b>	<u>91,074</u>	<u>(22,743)</u>