

ADVOCACY FOR OLDER PEOPLE IN GREENWICH

Registered Charity 1057221

REPORT AND ACCOUNTS FOR THE YEAR ENDED

31ST MARCH 2008

**Babbacombe Accounting Services Ltd.
90 Babbacombe Road
Bromley, Kent
BR1 3LS**

ADVOCACY FOR OLDER PEOPLE IN GREENWICH
(Registered Charity 1057221)

ANNUAL REPORT

FOR THE YEAR ENDED 31 MARCH 2008

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ADVOCACY FOR OLDER PEOPLE IN GREENWICH
(Registered Charity 1057221)

Charity name: **Advocacy for Older People in Greenwich**

Address: **Mycenae House
90 Mycenae Road
London SE3 7SE**

Registered Charity number: **1057221**

Management Committee and Trustees:

Victoria Duncan (Chair since 19 October 2007)
Heather Gilmore (Chair until 19 October 2007)
Camillus Osubor (Resigned 19 October 2007)
Angela Kearins (Resigned 19 October 2007)
Harbhajan Singh (Treasurer) (Appointed 19 October 2007)
Angela Burr (Appointed 19 October 2007)
Peter Dempsey (Appointed 19 October 2007)
Keith Reeves (Appointed 19 October 2007)

Staff Team

Eleanor Gibson (Director)
Samantha Everson (Volunteer Co-Ordinator)
Genya Robinson (Advocacy Project Worker)

Accountants

Babbacombe Accounting Services Ltd.
90 Babbacombe Road
Bromley
Kent BR1 3LS

Bankers

Co-operative Bank plc
PO Box 250
Skelmersdale
WN8 6WT

ADVOCACY FOR OLDER PEOPLE IN GREENWICH
(Registered Charity 1057221)

Trustees' Annual Report

The Trustees have pleasure in submitting their Annual Report for the year ended 31 March 2008.

Structure, governance and management

Advocacy for Older People in Greenwich was registered with the Charity Commission on 31 July 1996 and is governed by its constitution adopted on 23 July 1996 and amended by special resolution on 11 June 1999 and 26 September 2001.

The aims of the Charity are to relieve elderly persons in Greenwich by: providing a citizen advocacy and short term crisis advocacy service to vulnerable older people who are resident in the London Borough of Greenwich; promoting the rights of older people, helping them to overcome discrimination and enabling older people to participate in decisions about their future; providing support and information to those suffering isolation and loneliness associated with older age.

The Management Committee consists of a minimum of 5 members including the Chairperson and the Treasurer with a maximum of 10 members. Members are recruited through a combination of nomination, invitation and open application. They are elected each year at the Annual General Meeting. During the year the Committee may appoint members who will then be elected at the next Annual General Meeting. All new members of the Management Committee follow an induction programme and are offered appropriate training. There is also an on-going policy of continuing training for all Management Committee members where appropriate.

The day to day management of the Charity is conducted by the Director appointed by the Committee and who is responsible for managing the staff and overseeing the volunteers.

Objectives and activities

The objectives of the Charity is to run a citizen advocacy project where trained volunteer advocates and co-ordinating staff help older people to make informed choices about their own care needs and work to enhance the lives of people who are often socially isolated and vulnerable based on the aims of the charity as set out above.

In addition, the Charity aims to recruit, train and support local people to become citizen advocates, who will work on a one- to- one basis with a partner and to ensure their partner's views are heard and their rights pursued.

The volunteers form the basis of the citizen advocacy that the organisation provides. They are trained, supervised and supported by paid staff and without their contribution the Charity would not be able to function effectively.

Achievements and performance

The charity saw many achievements and changes during the year. Having started the year with a more stable funding situation, it was possible to focus efforts on the development and extension of the service.

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An outreach and publicity campaign targeted community organisations, lunch clubs and other pensioners' groups as well as care homes and sheltered housing complexes leading to a 30% increase in the level of referrals and doubling the number of advocacy partnerships in place. The biggest area of expansion was in crisis or short term partnerships as larger numbers of people in the lower age brackets came forward. The number of people resident in care homes and sheltered housing units benefiting from advocacy also increased as did those from minority ethnic communities, the latter by 30%.

Closer relationships were established with other organisations in the borough which helped to raise the profile and presence of the charity and build the basis for future partnerships. In addition, the charity was asked to provide advocacy awareness training to council employees thus enabling the promotion of independent advocacy.

The overall number of volunteers within the charity remained more or less stable. Two recruitment drives and advocacy training sessions brought in nine new volunteers: seven volunteer advocates and two volunteer admin support workers.

There were a several staff changes. The Development Manager and the Advocacy Project Worker both left. This gave the opportunity to review the various job roles and reallocate tasks and responsibilities. The new manager was appointed in September and took on the title and role of Director. Several Management Committee members retired and were replaced which led to a broadening of the skills base of the Management Committee.

Future plans and projects

The year ended with some exciting new prospects. In mid April, the charity moved to new premises in Mycenae House, a vibrant community centre with good facilities. A new project was due to be launched in June 2008: a six month pilot project to set up and run advocacy groups in two care homes. This was a particularly satisfying project as the organisation had tried for some years to obtain such funding, having had to discontinue such a similar project. It is hoped that funding will be found over the next year to extend this work.

Financial Review

The charity had a good year financially with an income of almost £75,000 from six funders and several donations. Expenditure was kept well within budget and a contingency fund of £25,000 has been carried forward. This allows the maintenance of the organisation's reserves policy – to retain funds to cover three months running costs in the event of having to wind down the organisation – as well as providing a small financial cushion for the next year.

The charity was successful in obtaining £21,000 for a third year of funding from the City Bridge Trust, which contributed towards the core costs. With the addition of the Comic Relief and City Parochial Foundation grants, this gave the organisation a secure financial basis for the year. Money was also received from London & Quadrant, Goldsmiths Foundation and Lloyds TSB to support various projects.

The charity is aware that it is coming to the end of a number of three year grants from larger funders. All of these funders have indicated that we can reapply over the next year for further funding. However, there is no guarantee that we will obtain it and the charity has therefore been actively seeking new sources of funding elsewhere.

This search has had some success. For example, Help the Aged is contributing almost £10,000 for a project doing group advocacy in care homes during 2008 and the Rayne Foundation has shown some

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interest in providing continuation funding for this project. A grant of £4,900 has been made to training and volunteer recruitment by Awards for All and Trusthouse Foundation have given £2,000 towards BME advocacy work. Several other bids are in the pipeline such as Big Lottery: Reaching communities, London & Quadrant Housing Association and the Henry Smith Charity.

A review of the organisation's overall strategy was started in 2008 to prepare a business and development plan for the next three years. A risk assessment of financial matters was included to ensure that the charity is prepared for all possible eventualities.

V Duncan

Chairperson

3 September 2008

ADVOCACY FOR OLDER PEOPLE IN GREENWICH
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INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF ADVOCACY FOR OLDER PEOPLE IN GREENWICH FOR THE YEAR ENDED 31ST MARCH 2008

I report on the unaudited accounts for the year ended 31st March 2008 as set out on pages 7 to 13

RESPECTIVE RESPONSIBILITIES OF THE TRUSTEES AND THE INDEPENDENT EXAMINER

As described on page 8, you as the Trustees are responsible for the preparation of the accounts; you consider that the audit requirement of Section 43(2) of the Charities Act 1993 does not apply and that an independent examination is needed.

It is my responsibility to:

- examine the accounts (under section 43(3)(a) of the 1993 Act);
- to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 43(7)(b) of the 1993 Act); and
- 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 Charities Commissioners. An independent examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the accounts.

INDEPENDENT EXAMINERS' STATEMENT

In the course of my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that, in any material respect, the Trustees have not met the requirements to ensure that:
 - (a) proper accounting records are kept in accordance with section 41 of the 1993 Act; and
 - (b) accounts are prepared which agree with the accounting records and comply with the accounting requirements of the 1993 Actor
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

J P TAUNTON
MAAT, ATT

90 Babbacombe Road,
Bromley, Kent
BR1 3LS

10 October 2008

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STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31ST MARCH 2008

	Notes	Unrestricted fund	Restricted income funds	2008 Total	2007 Total
		£	£	£	£
Incoming resources:					
Incoming resources from generated funds:					
Voluntary income		773	71,447	72,220	69,907
Investment income		<u>1,965</u>	<u>-</u>	<u>1,965</u>	<u>1,194</u>
Total incoming resources	2	<u>2,738</u>	<u>71,447</u>	<u>74,185</u>	<u>71,101</u>
Resources expended:					
Cost of generating funds					
Costs of generating voluntary income		-	5,866	5,866	5,115
Charitable activities		554	61,399	61,953	64,462
Governance costs		<u>-</u>	<u>988</u>	<u>988</u>	<u>840</u>
Total resources expended	3	<u>554</u>	<u>68,253</u>	<u>68,807</u>	<u>70,417</u>
Net (outgoing)/ incoming resources for the year		2,184	3,194	5,378	684
Transfer between funds		729	(729)	-	-
Funds brought forward		<u>22,141</u>	<u>2,821</u>	<u>24,962</u>	24,278
Funds carried forward	9	<u>25,054</u>	<u>5,286</u>	<u>30,340</u>	<u>24,962</u>

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BALANCE SHEET AS AT 31ST MARCH 2008

	Notes		2008	2007
		Unrestricted funds	Restricted income funds	Total
		£	£	£
Fixed assets				
Tangible assets	6	929	-	929
Current assets				
Debtors	7	6,610	386	6,996
Cash at bank		<u>17,515</u>	<u>14,895</u>	<u>32,410</u>
		<u>24,125</u>	<u>15,281</u>	<u>38,406</u>
Creditors: due within one year	8	<u>-</u>	<u>(9,995)</u>	<u>(9,995)</u>
Net current assets		<u>24,125</u>	<u>5,286</u>	<u>29,411</u>
Net assets		<u>25,054</u>	<u>5,286</u>	<u>30,340</u>
Funds of the charity				
Funds carried forward:				
Unrestricted funds		5,054	-	5,054
Designated funds		20,000	-	20,000
Restricted income funds		<u>-</u>	<u>5,286</u>	<u>5,286</u>
Total funds	9	<u>25,054</u>	<u>5,286</u>	<u>30,340</u>

The Charities Act 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 at the end of the year and of the surplus or deficit for the year then ended.

In preparing these financial statements, the Trustees are required to select suitable accounting policies, as described on page 9 and then apply them on a consistent basis, making judgements and estimates that are prudent and reasonable. The Trustees must also prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The Trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 1993. The Trustees are also responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud and other irregularities.

These financial statements were approved by the members of the committee on 3 September 2008 and were signed on their behalf by:

V Duncan
Chairperson

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Notes to the accounts for the year ended 31st March 2008

1. ACCOUNTING POLICIES

Accounting basis:

These accounts have been prepared on the basis of historic cost and in accordance with the Financial Reporting Standard for Smaller Entities (effective January 2007); the Accounting and Reporting by Charities – Statement of Recommended Practice (SORP 2005); and the Charities Act 1993.

INCOMING RESOURCES

Recognition of incoming resources:

These are included in the Statement of Financial Activities when:

- The charity becomes entitled to the resources;
- The trustees are virtually certain they will receive the resources; and
- The monetary value can be measured with sufficient reliability.

Incoming resources with related expenditure:

Where incoming resources have related expenditure, the incoming resources and related expenditure are reported gross in the Statement of Financial Activities.

Volunteer help:

The value of any voluntary help received is not included in the accounts.

Investment income:

This is included in the accounts when receivable.

EXPENDITURE AND LIABILITIES

Liability recognition:

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

Governance costs:

Include the costs of preparation and examination of statutory accounts, the costs of the Annual General Meeting and costs of any legal advice to trustees on governance or constitutional matters.

FIXED ASSETS

Tangible fixed assets for use by the charity:

These are capitalised if they can be used for more than one year. They are valued at cost or, if gifted, at the value to the charity on receipt.

Depreciation:

Depreciation has been provided at the following rates in order to write off the assets over their estimated useful lives:

Furniture and equipment: 25% on cost

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2. Analysis of incoming resources

	2008	2007
	£	£
Voluntary income:		
Restricted:		
London Borough of Greenwich	-	510
The Goldsmiths' Company	3,000	-
Comic Relief	28,834	28,835
London & Quadrant	2,868	2,049
City Parochial Foundation	15,000	14,600
Lloyds TSB Foundation	2,912	2,913
City Bridge Trust	18,833	20,000
Unrestricted:		
Donations	773	1,000
Total	<u>72,220</u>	<u>69,907</u>
Investment income:		
Bank interest	1,965	1,194
	<u>1,965</u>	<u>1,194</u>

3. Analysis of resources expended

	General fund	Restricted funds	2008 Total	2007 Total
	£	£	£	£
<u>Fundraising costs:</u>				
Staff costs	-	5,866	5,866	5,115
<u>Charitable activities:</u>				
Staff costs	-	50,497	50,497	53,875
Volunteer costs	-	1,984	1,984	1,200
Office and running costs	-	3,685	3,685	3,189
Sundries	-	57	57	461
<u>Support costs:</u>				
Premises	-	4,470	4,470	4,630
Insurance	-	706	706	682
Depreciation	554	-	554	425
Total	<u>554</u>	<u>61,339</u>	<u>61,953</u>	<u>64,462</u>
<u>Governance costs:</u>				
Committee training & expenses	-	68	68	26
Annual Report and AGM	-	325	325	319
Independent Examiners fees	-	595	595	495
Total	<u>-</u>	<u>988</u>	<u>988</u>	<u>840</u>
Total resources expended	<u>554</u>	<u>68,253</u>	<u>68,807</u>	<u>70,417</u>

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4. Details of certain items of expenditure

Trustee expenses

During the year, no travelling expenses were paid to members of the management committee (2007: nil)

Fees for examination of the accounts	2008	2007
	£	£
Independent examiner's fee	595	495
	=====	=====

5. Employees

	2008	2007
	£	£
Salaries	49,059	50,567
Employers National Insurance costs	4,096	5,500
Pensions	653	<u>1,199</u>
	<u>53,808</u>	<u>57,266</u>

The average number of full-time staff during the year was 2 (2007: 2)

6. Fixed Assets

	Fixtures & fittings	Total
	£	£
Cost at 1 st April 2007	9,847	9,847
Additions	729	729
Disposals	<u>(133)</u>	<u>(133)</u>
At 31 st March 2008	<u>10,443</u>	<u>10,443</u>
Depreciation:		
At 1 st April 2007	9,093	9,093
Charge for the year	554	554
Disposals	<u>(133)</u>	<u>(133)</u>
At 31 st March 2008	<u>9,514</u>	<u>9,514</u>
Net book value at 31st March 2008	<u>929</u>	<u>929</u>
Net book value at 31 st March 2007	<u>754</u>	<u>754</u>

7. Debtors

	2008	2007
	£	£
Debtors	6,610	8,782
Prepayments	386	<u>346</u>
	<u>6,996</u>	<u>9,128</u>

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8. Creditors: amounts due within one year

	2008	2007
	£	£
Accruals	595	495
Deferred income	<u>9,400</u>	<u>14,113</u>
	<u>9,995</u>	<u>14,608</u>

9. Details of funds

Donor/name of fund	Purpose and restrictions
City Bridge Trust	The Charity has received a grant of £40,000 over a two year period to fund a Project Manager within its core activities. This funding ceased in August 2007 and the Charity was most grateful to receive a further extension of one year with a grant of £21,000 until August 2008.
Comic Relief	The Charity has received a grant of £87,537 over a three year period commencing April 2006 towards the salary of a advocacy worker and running costs of the project.
City Parochial Foundation	The Charity has received a grant of £39,600 over a three year period commencing April 2006 toward the salary and running costs of an advocacy worker to support older people from the black and minority ethnic communities
Lloyds TSB Foundation for England and Wales	The Charity has received a grant of £5,825 towards the costs of the salary of a part time project worker commencing October 2006 for one year.
London and Quadrant	The Charity has received a grant of £4,917 towards the costs of the salary of a part time project worker and a grant towards the costs for volunteers. This grant commenced in November 2006 for one year
The Goldsmiths' Company	In June 2007, the Charity has received a grant of £3,000 towards the costs of the Volunteer Co-Ordinator.
Trusthouse	The Charity has received a grant of £2,000 towards the costs of a BME and Outreach Advocacy Worker for 2008/09. This grant has been treated as deferred income and will be accounted for in the 2008/09 accounts.
Awards for All	In March 2008, the Charity has received a grant of £4,900 for training sessions in advocacy and dementia advocacy for BME community groups. This grant has been treated as deferred income and will be accounted for in the 2008/09 accounts.
Designated fund	This fund has been established by the Management Committee to provide for unexpected contingencies which may arise from time to time

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Movement in funds	Fund balances brought forward	Incoming resources	Outgoing resources	Transfers between funds	Fund balances carried forward
Fund name:	£	£	£	£	£
City Bridge Trust	-	18,833	(15,672)	-	3,161
Comic Relief	2,821	28,834	(30,926)	(729)	-
City Parochial Foundation	-	15,000	(14,875)	-	125
Lloyds TSB Foundation	-	2,912	(2,912)	-	-
London & Quadrant	-	2,868	(2,868)	-	-
The Goldsmiths' Company	<u>-</u>	<u>3,000</u>	<u>(1,000)</u>	<u>-</u>	<u>2,000</u>
Total Restricted Funds	<u>2,821</u>	<u>71,447</u>	<u>(68,253)</u>	<u>(729)</u>	<u>5,286</u>
Designated Fund	20,000	-	-	-	20,000
General Fund	<u>2,141</u>	<u>2,738</u>	<u>(554)</u>	<u>729</u>	<u>5,054</u>
Total Unrestricted Funds	<u>22,141</u>	<u>2,738</u>	<u>(554)</u>	<u>729</u>	<u>25,054</u>

During the year the Charity received a capital grant of £729 from Comic Relief. This money has been spent in accordance with the conditions of the grant and the capital items have been transferred to general reserves.