



**Dudley Advocacy Trustees Report  
for year ending 31<sup>st</sup> March 2017**

# DUDLEY ADVOCACY

## LEGAL AND ADMINISTRATIVE INFORMATION

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<b>Trustees</b>	D Price (Chairman) Mrs C M Grimmitt (Deputy chair) J Turley K E Drew Mrs J Shiels J Bennett Mrs S Bennett M A Rumble
<b>Secretary</b>	Mrs L A Nock
<b>Chief officer</b>	Mrs L A Nock
<b>Charity number</b>	1109897
<b>Company number</b>	5354254
<b>Principal address</b>	The Savoy Centre Northfield Road Netherton Dudley West Midlands DY2 9ES
<b>Registered office</b>	The Savoy Centre Northfield Road Netherton Dudley West Midlands DY2 9ES
<b>Independent examiner</b>	Christopher Cooper A.C.A., F.C.C.A Price Pearson Finch House 28 - 30 Wolverhampton Street Dudley DY1 1DB
<b>Bankers</b>	HSBC 226 High Street Dudley West Midlands DY1 1PQ

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# DUDLEY ADVOCACY

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT)

### FOR THE YEAR ENDED 31 MARCH 2017

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The trustees present their report and accounts for the year ended 31 March 2017.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charitable company'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)" (as amended for accounting periods commencing from 1 January 2016)

#### Objectives and activities

Dudley Advocacy ensures that vulnerable people in Dudley have the right to be heard, listened to and not marginalized or socially excluded.

Our aims, as always are –

- To defend equal rights and fight discrimination.
- To support people to ensure that their human rights are upheld.
- To represent the needs and wishes of vulnerable people.
- To support people who need help to express their views and to make sure they are heard, listened to and receive answers.
- To enable people to have a say in the services they use and who works in them.

We achieve these aims by –

- putting vulnerable people first
- listening to what vulnerable people have to say
- making sure that people who should be listening begin and continue to listen
- asking questions of people and organisations that haven't been asked before
- expecting and receiving answers to questions and if none is forthcoming, then we ask again and again

In setting our objectives and planning our activities the Trustees have given careful consideration to the duty in Section 17(5) of the Charities Act 2011 to have due regards to the Charity Commission's general guidance on public benefit.

# DUDLEY ADVOCACY

## TRUSTEES' REPORT (CONTINUED)(INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 MARCH 2017

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### Achievements and performance

#### Advocacy

Staff have continued to support vulnerable people with many different issues.

We always ensure that the advocacy we provide is user led and independent from services and the length of an advocacy partnership depends on the issue in question.

We continued to provide two statutory advocacy services. The Independent Mental Capacity Service (IMCA) provides support to people who lack capacity to make certain decisions. These are regarding serious medical treatment, accommodation, safeguarding and reviews. The IMCA also supports people subject to Deprivation of Liberty Order (DoLS). This when people are restricted of their liberty for a variety of reasons and our services provide a relevant paid representative (RPR) to ensure that they are cared for and kept safe in the least restrictive way possible.

We provided an out of borough RPR service for Dudley for people not living in Dudley but are funded by Dudley. We also began to provide a RPR service for other local authorities where they have people under a DoLS and are out of borough. Both of these areas of work are separate to existing services and have brought in extra revenue.

The other statutory service we provide is Care Act advocacy. This is the second year that we have provided this service. This is for people who have 'substantial difficulties' and need support with care assessments, care support and planning and reviews. Demand increased from the first year of the service and we worked with commissioners to increase the funding and the post was made full time. This is still not enough to ensure that there is no waiting list. We continue to work with commissioners to inform them of the need for more Care Act advocacy funding as they prepare to put services to tender. We found that people with accommodation issues that used to be supported by an IMCA were fulfilling the criteria for Care Act advocacy so we saw a decrease in the number of referrals to IMCA for accommodation issues.

Our Complex Needs Advocacy service, although funded by the local authority is, not a statutory requirement. This service is for people with multiple disabilities and sometimes no verbal communication. We use non-instructed advocacy to ensure that people who do have complex needs are empowered to have a say in how they live their life. During the year, we found that some people who would have used our complex needs service were supported by Care Act advocacy. However, we did not see a decrease in the number of people still supported by our complex needs advocacy service.

We continued to provide three specific types of non-statutory advocacy in our second year of lottery funding.

Volunteer Advocacy supported people with a learning disability by recruiting and training volunteers to work on a one to one basis with their partner. We ensured that our volunteers had thorough and diverse training including what is advocacy, awareness of learning disabilities, safeguarding, confidentiality and boundaries. Our volunteers are committed to ensuring that they provide the best possible support.

Parents Advocacy provided support to parents with a learning disability whose children are subject to safeguarding children proceedings. This support enables parents to have input into what is a very difficult and traumatic process. Advocacy has ensured that parents are treated with respect and do not experience discrimination because of their disability. We have found that parents who have mental health issues and learning difficulties are also being referred or asking for support.

Mental Health Advocacy supported people who are experiencing mental health issues as a voluntary in-patient or living in the community. These are people who have no right to statutory advocacy as they are not detained legally by being sectioned. Advocacy support helps them have input into their treatment and care and this gives them more control and helps them feel safe.

Staff and volunteers supported 732 people with a variety of different issues and this led to 3142 outcomes for people.

# DUDLEY ADVOCACY

## TRUSTEES' REPORT (CONTINUED)(INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 MARCH 2017

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### Other activities

We worked with commissioners to run a pilot project to recruit and train volunteers to act as advocates for people who are subject to a DoLS order ensuring that they have more visits than we can provide with the paid RPR. This means that people have more frequent visits and are better supported. The paid RPR and the Volunteer Development Officer both support the volunteer and if needed, the RPR will investigate any concerns the volunteer may have around the persons care. This pilot project is funded until March 2018.

We began work on achieving the Quality Performance Mark so that we can show future funders that we have an officially recognised quality mark that demonstrates that we offer an independent and quality service.

We continued to work with commissioners as they prepare to put all advocacy services in Dudley out to tender.

We continued to seek out further funding to carry on providing independent non-statutory advocacy because there are a great number of people that do not fit the criteria for statutory advocacy and they are left without support when they really need it.

### Financial review

The Statement of Financial Activities shows gross income for the year of £291,036 and expenditure of £251,722.

Reserves stand at £100,549 in total, consisting of £573 restricted funds, and £99,976 unrestricted funds.

### Reserves

Dudley Advocacy holds general unrestricted reserves in order to:

- ensure that Dudley Advocacy can meet its obligations in the short term in the event of late payment of grants
- cover any outstanding liabilities such as staff redundancy payments and remaining lease commitments
- ensure that Dudley Advocacy's core activity can continue during a period of unforeseen difficulty
- finance an unexpected increase in running costs
- finance some unexpected capital expenditure

The directors and trustees will seek to maintain unrestricted funds, not designated for the next 12 months or invested in fixed assets, equivalent to a minimum of 6 months revenue expenditure on its core activities to finance these eventualities should they occur. In the event that these reserves significantly exceed this amount in any one year the Management Committee will determine a planned use of these excess reserves on activities in the following financial year.

'Core activities' are defined as those general advocacy activities funded from the core grant received by Dudley Advocacy Limited.

The reserves will be maintained in a form realisable within 28 days.

On this basis the required level of free reserves at 31 March 2017 was £94,000 and the actual level of free reserves was £99,763. The charitable company considers that reserves held in excess of the required level will ensure that, in the event of a significant drop in funding, they will be able to continue their current activities while consideration is given to ways in which additional funds may be raised.

### Risk Management

The directors and trustees monitor the major strategic, business and operational risks which the charitable company faces to ensure that systems are adequate to mitigate these risks.

# DUDLEY ADVOCACY

## TRUSTEES' REPORT (CONTINUED)(INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 MARCH 2017

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### Future plans

We will continue to source funding to enable us to become more sustainable and ensure that we have long term sustainability.

We will seek continuation funding to enable us to continue providing our current non-statutory advocacy services.

We will continue to explore other areas of work that we can do and will enhance our existing advocacy services and develop new services.

We will continue to recruit and train volunteers so that we are able to offer advocacy support to people who do not fit the criteria for statutory advocacy.

We will continue to provide advocacy to vulnerable people and ensure that they not experience discrimination because of their disability and that they are always treated with dignity and respect.

### Structure, governance and management

The charitable company is constituted as a company limited by guarantee and was set up by a Memorandum and Articles of Association on 7 February 2005 as amended by special resolutions dated 1 June 2005 and 26 July 2006.

The objects of the charitable company are to provide an advocacy service, to assist in any way any person with a disability, including, but not restricted to, learning difficulties, physical disabilities, mental illness or age.

The day to day running of the charity is delegated to the chief officer under the supervision of the trustees.

The charity is also grateful to a number of volunteers who assist in various capacities.

### Members of the Council of Management

All directors of the company are also trustees of the charitable company and there are no other trustees. None of the trustees have any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £10 in the event of a winding up. All trustees that served during the year are listed below:

D Price (Chairman)

Mrs C M Grimmitt (Deputy chair)

J Turley

K E Drew

Mrs J Shiels

J Bennett

Mrs S Bennett

M A Rumble

T M Welsh

(Resigned 1 April 2017)

P Priestley

(Resigned 26 March 2017)

The trustees are elected from the membership of the organisation. Trustees are nominated, proposed and seconded by members and carried at the AGM. Trustees are able to co opt a person to the committee for their expertise and knowledge, usually from statutory organisations, however those persons co opted have no voting powers.

# DUDLEY ADVOCACY

## TRUSTEES' REPORT (CONTINUED)(INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 MARCH 2017

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### Asset cover for funds

Note 17 sets out an analysis of the assets attributable to the various funds. These assets are sufficient to meet the charity's obligations on a fund by fund basis.

### Investments

Under the Memorandum and Articles of Association the charitable company has the power to make any investment which the directors and trustees see fit.

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

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**D Price (Chairman)**

Trustee

Dated: 2.11.17.....