



xfordshire Advocacy
getting heard

**TRUSTEES' ANNUAL REPORT AND ACCOUNTS
FOR THE YEAR ENDING
31 MARCH 2012**

Registered Charity Number: 1134103

Company Number: 06845465

OXFORDSHIRE ADVOCACY

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1. REFERENCE AND ADMINISTRATIVE DETAILS

1.1 **Full name of Charity:** Oxfordshire Advocacy

1.2 **Governing Documents:**

Memorandum of Association of Oxfordshire Advocacy
Articles of Association of Oxfordshire Advocacy

1.3 **Charity Registration Number:** 1134103
Company Number: 06845465

1.4 **Manager:** Jez Newall

1.5 **Trustees:**

Hilary Pogge – Chair	1 April 2011 - 31 March 2012
Diana Roberts – Vice-Chair	1 April 2011 - 31 March 2012
Martyn Bishop	1 April 2011 - 31 March 2012
Anne Cowell	1 April 2011 - 31 March 2012
Hilary Walker	1 April 2011 - 31 March 2012
Hilary Beale	1 April 2011 - 31 March 2012
Larry Gardiner	Elected July 2011 - 31 March 2012
Gill Howe	1 April 2011 – resigned July 2011
Jemma Queenborough	1 April 2011 – resigned July 2011
Robert Mathers – Treasurer	Co-opted Sept 2011 - 31 March 2012

1.6 **Address of Principal Office:**

Oxfordshire Advocacy
Barton Neighbourhood Centre
Underhill Circus
Barton, Oxford
OX3 9LS

Website: www.gettingheard.org

Email: oadg@oadg.org.uk

1.7 **Bankers:**

CAF Bank Ltd
25 Kings Hill Avenue
Kings Hill
West Malling
Kent
ME19 4JQ

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2. STRUCTURE, GOVERNANCE AND MANAGEMENT

- 2.1 **Organisation of the Charity:** Oxfordshire Advocacy (OA), formerly known as Oxfordshire Advocacy Development Group (OADG), was established in 1990, since which time it has a proud record of service and support for vulnerable people in Oxfordshire. The executive committee meets twelve times per year. The executive committee comprises the Trustees and includes the Chair Ms Hilary Pogge and eight other members. Potential new Trustees are interviewed by the Chair who provides them with a Trustee induction pack, and those wishing to be considered are invited to attend a Trustee meeting as an observer, to meet the Trustees and ask any questions about the role. Those then wishing to become a member are voted on by the existing Board of Trustees. Trustees act as individuals and do not represent or act on behalf of another group.
- 2.2 **Changes to the Organisation:** The accounts in this document therefore reflect the financial activities of Oxfordshire Advocacy. OA formed as a Limited Company on 12th March 2009 and then registered with the Charity Commission as a company limited by guarantee with charitable status. Prior to the period covered by this report and accounts an Extra-Ordinary General Meeting was held and it was resolved that the funds of OADG be transferred to OA with effect from 1 April 2011.
- 2.3 **Governance:** The day to day management of the charity is the responsibility of the manager, in accordance with the strategy decided by the executive committee.
- 2.4 **Public Benefit:** The 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.
- 2.5 **Professional advice:** When necessary the Trustees seek advice and support from professional advisers including solicitors and accountants.
- 2.6 **Trustees' Responsibilities:**
- 2.6.1 The Trustees are responsible for preparing financial statements for each financial year that give a true and fair view of the incoming resources and application of resources during the year and its state of affairs at the end of the year. In preparing the financial statements, the Trustees are required to:
- 2.6.1.1 select suitable accounting policies and apply them consistently,
 - 2.6.1.2 make judgements and estimates that are reasonable and prudent,
 - 2.6.1.3 follow applicable accounting standards and statements of recommended practice subject to any material departures disclosed and explained in the financial statements,

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2.6.1.4 Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

2.6.2 The Trustees are responsible for keeping proper accounting records which 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 Charity Act 2011. 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.

2.7 **Summary of Investment Powers:** There are no limitations in the Trustees' powers of investment.

2.8 **Risk Management:** The Trustees have reviewed the major risks that the charity faces, and systems have been established to mitigate these risks. Systems and procedures are periodically reviewed to ensure that they still meet the needs of the charity.

3. OBJECTIVES AND ACTIVITIES

3.1 **Charitable Objectives:** The charitable objective of the charity is to support and/or relieve people suffering from mental health problems, learning disability, physical disability, age or poverty and/or people experiencing any other dilemma, by the provision of an advocacy service and to advance the education of the public in advocacy. The area of operation of the charity is Oxfordshire.

3.2 **Aims:** The aims during the year have been:

3.2.1. **General Advocacy Work:** To promote general advocacy work within the county of Oxfordshire.

3.2.2. **All-age Dementia Advocacy Project (ADAPt):** To continue to develop and support the specialist advocacy service for people with dementia.

3.2.3. **Citizen Advocacy for People of Oxfordshire with a Learning Disability (CAPOLD):** To continue to develop and support the CAPOLD service and the advocacy service funded by the Learning Disability Partnership Board for adults with a learning disability involved with the County Council's Children and Families services.

3.2.4 **Oxfordshire Short Term Advocacy Scheme (OSTAS):** To continue to develop and support the short-term generic advocacy service for all adults in Oxfordshire.

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- 3.2.5. **Independent Mental Capacity Advocacy Service (IMCA):** To provide and develop this service, including the provision of the advocacy service to the Deprivation of Liberty Service (DOLS), and provision of the Relevant Persons Representative service.
- 3.2.6 **Project Work:** To undertake specific projects that relate to advocacy and specifically supporting groups and developing groups' skills through training and mentoring, enabling self advocacy and for groups to advocate for themselves.
- 3.2.7 **Advocacy Training of staff and volunteers:** To support the OA team to undertake the new National Advocacy Qualifications. Ensure all staff and volunteers providing advocacy or who may have access to information are CRB checked and receive appropriate training.
- 3.2.8 **ICT Systems Upgrade:** During the year we successfully secured restricted funds to upgrade our ICT hardware, software and systems and thanks to the Clothworkers' Foundation and The Beatrice Lang Trust for donations specifically towards this project.
- 3.3 **General Advocacy Work:** The charity continues to promote advocacy county-wide to increase understanding and awareness of the need for advocacy and the support for advocacy from provider services.
- 3.4 **All-age Dementia Advocacy Project (ADAPt):** This countywide service has been provided by one advocacy coordinator and a number of trained volunteers who offer advocacy to people with dementia and similar conditions living in the community, residential care and hospital. As the population ages there is an increasing number of people with dementia, many without relatives or friends to act for them. Advocacy makes an important contribution to the lives of many people with dementia through the advocate being able to spend time establishing the person's wishes and ensuring that these are taken into consideration when decisions of importance are being made that will affect them. This service is partly funded through a grant from the Oxfordshire County Council.
- 3.5 **Citizen Advocacy for People of Oxfordshire with a Learning Disability (CAPOLD Community):** This service has been provided by two part-time coordinators together with trained volunteers. One coordinator is funded through the grant received from Oxfordshire County Council Social and Community Services and the other by a grant from Oxfordshire's Learning Disability Partnership Board. The latter grant has enabled the continued employment of the second part-time coordinator to develop the advocacy service for parents with a learning disability who are involved with the County Council's Children and Families service. The second coordinator has contributed to the number of enquiries responded to and the number of advocacy partnerships provided.

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- 3.6 **Oxfordshire Short Term Advocacy Scheme (OSTAS):** This county-wide service has been funded through the grant from Oxfordshire County Council Social and Community Services and is provided by two part-time coordinators together with trained volunteers. The service focuses on short-term issues of importance identified by the service users.
- 3.7 **Independent Mental Capacity Advocacy Service (IMCA):** The charity has provided the IMCA service since the Mental Capacity Act 2005 started being implemented in April 2007. The service has been led by two newly appointed Mental Capacity Act Leads and supported by the rest of the team. All OA's Advocacy Coordinators are trained IMCAs. IMCAs are an independent voice for people who lack capacity to make specific decisions, when that decision is being taken for them by other professionals and they have no friends or family to be consulted on their behalf. The role acts as a safeguard to ensure that best interest decision making is carried out for these individuals and that their wishes and feelings are represented, as far as this is possible, and taken into account.
- 3.8 **Deprivation of Liberty Safeguards (DOLS):** Under DOLS the role of paid Relevant Person's Representative (RPR) has been developed. When the individual being deprived has no friends or family, a paid RPR is requested. This is very much an advocacy role and OA uses both the staff and recruits from the volunteers pool, ensuring that those undertaking it are trained in the Mental Capacity Act and DOLS.

4. ACHIEVEMENTS AND PERFORMANCE

- 4.1 **General Advocacy Work:** Through marketing, newsletters, training and attendance at conferences and seminars OA has promoted advocacy countywide to increase awareness of the need for advocacy and the support for advocacy from service providers.

Enquiries received and Partnerships developed from these enquiries year on year and conversion¹ rates are reflected in the table below:

	Enquiries	Partnerships	Conversion rate %
2011 - 2012	564	391	69
2010 - 2011	443	380	86

The increase in the number of enquiries demonstrates an increased need for advocacy in Oxfordshire.

- 4.2 **All-age Dementia Advocacy Project (ADAPt)**

The total number of referrals received was 72 of which 47 were predominately non-instructed advocacy and 25 predominately instructed advocacy.

¹ Conversion rate illustrates conversion of enquiries into partnerships

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The number of partnerships being undertaken by volunteers increased by 50%.

4.3 **Citizen Advocacy for People of Oxfordshire with a Learning Disability (CAPOLD)**

CAPOLD has exceeded its Business and Annual Plan target of 40 partnerships for 2011-2012, with a running total of 51 partnerships active during the year. Of the 51, 24 are new instructed partnerships and 2 new non-instructed partnerships started in this year. Of the total of 51, approximately 90% are instructed partnerships and 10% are non-instructed partnerships.

CAPOLD had 18 partnerships undertaken by volunteers, the actual running total was 28. Volunteers are working on 55% of all of our partnerships (an increase on the 32% of the previous year).

4.4 **Oxfordshire Short Term Advocacy Scheme (OSTAS)**

OSTAS received 230 enquires which developed into 130 partnerships. Of these 130 partnerships 108 were undertaken by volunteers which is an increase of almost 40% compared with the previous year. Partnerships tend to be of shorter duration which has enabled the waiting list at any one moment to have been kept down. Referrals came from all districts within the County and involved a wide spread of issues. OSTAS is coordinated by the team in the office and supported by over 40 trained volunteers.

4.5 **Independent Mental Capacity Advocacy Service (IMCA) and Deprivation of Liberty Safeguards (DOLS)**

OA has continued to provide the IMCA service. The number of eligible referrals during the year was 118. There were 77 DOLS authorisations received from the supervisory body all of which were acted upon within stipulated guidelines.

IMCA leads have been committed to ensuring promotion of the service and the continuing professional development for all IMCA caseworkers and paid RPRs.

Other key activities undertaken in the marketing and implementation of the service were:

- Promotion of service through contacts and participation with the Safeguarding Adults Manager, Oxford Health, NHS Foundation Trust.
- Promotion of service through contact and participation with Faiers Mental Capacity Act Training to OCC decision makers.
- Networking with the Mental Capacity Act South East Forum.
- Attendance at Oxfordshire Safeguarding Adults Board sub group for DOLS.

4.6 **Volunteers**

Oxfordshire Advocacy is proud to work with volunteers and we currently have over 45 trained volunteers who have passed through our externally accredited training programme and are now taking supporting partners to have their voices heard.

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Volunteers support Oxfordshire Advocacy in other ways too and during the previous year we have had volunteers putting significant time and supporting with the following:

1. Marketing / attending events / awareness raising
2. Website development
3. Business Planning
4. Annual Review preparations
5. ICT Hardware planning and installation
6. Database design and architecture
7. Support with volunteer training and training facilitation

Volunteers participated at the AGM in July 2011 with several volunteers reading out 'partner' comments to illustrate the broad spectrum of our advocacy work.

- 4.7 **Project Work:** During the year OA continued to work with Oxfordshire County Council where residents in supported living needed support in having their voices heard. This work entailed supporting 20 partners in ensuring their views were considered during the tendering process in change of provider for supported living. The advocacy undertaken varied from a watching brief to the use of an amanuensis and to full non instructed advocacy. Advocates acted as general independent representatives at public meetings and stakeholder meetings throughout the county.

OA has also undertaken various other bespoke pieces of work including support to residents groups in care homes.

5 FINANCIAL REVIEW

- 5.1 **Financial Statements:** The financial statements comply with current statutory requirements, the Statement of Recommended Practice (Accounting and Reporting by Charities) (SORP 2005) and the charity's governing document.

- 5.2 **Overview:** The accounts show that OA made a loss in the financial year of £12,972. Total incoming resources were £154,195 compared to the previous year's total of £172,401. Expenditure has decreased from £220,174. to £167,167.

- 5.3 **Unrestricted Fund:** The deficit on unrestricted funds in the year was £21,585.

- 5.4 **Restricted Funds:** The surplus on restricted funds in the year was £8,613.

- 5.5 **Reserves Policy:** The trustees have reviewed the reserves of the charity and have set a policy which aims to have unrestricted reserves sufficient to cover three month's core running costs and costs of closure. Trustees estimate this would give a target of unrestricted reserves at March 2012 of £60,000 compared to actual unrestricted reserves of £95,008.

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Trustees regularly review the adequacy of unrestricted reserves with regard to medium term planning of the Charity and the wider economic climate.

6. PLANS FOR FUTURE PERIODS

6.1 OA intends to work towards the following objectives:

- 6.1.1 to secure funding to sustain and develop OA's Advocacy services
- 6.1.2 to ensure our service is promoted to all groups across Oxfordshire and to promote equality of access to our service for all
- 6.1.3 to work collaboratively and in partnership with all relevant agencies, user-led organisations and local government in Oxfordshire to ensure our customers are supported in coordination
- 6.1.4 to ensure our customers' feedback informs our service development
- 6.1.5 to continue to provide the statutory Independent Mental Capacity Advocacy service
- 6.1.6 to continue to provide the IMCA role in connection with the new Deprivation of Liberty Safeguards assessment process, including provision of Relevant Person's Representatives to those who have been deprived of their liberty
- 6.1.7 to support the work of the coordinators in the recruitment of volunteers to work across the OA service
- 6.1.8 to increase the input of volunteers as both volunteer advocates and in other diverse ways where skill and experience are complementary
- 6.1.9 to continue to develop existing funding sources and to identify new and creative ways of fund-raising to enable the development of services across Oxfordshire
- 6.1.10 to ensure value for money by:
 - 6.1.10.1 maximising the use of volunteers and their effectiveness,
 - 6.1.10.2 developing more effective monitoring and evaluating systems,
 - 6.1.10.3 integrating partner feedback into the service by ensuring input at all stages of the project cycle.

Signed for and on behalf of the Trustees:

Print Name: HILARY BEALE

Signature: H.A. Beale

Date: 12.7.2012

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**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES
OF OXFORDSHIRE ADVOCACY**

1. General

1.1 I report on the accounts of the company for the year ended 31 March 2012, which are set out on pages 10 to 15.

2. Respective responsibilities of trustees and examiner

2.1 The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. 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.

2.2 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:

2.2.1 examine the accounts under section 145 of the 2011 Act;

2.2.2 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

2.2.3 to state whether particular matters have come to my attention.

3. Basis of independent examiner's report

3.1 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 accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, 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 accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

4. Independent examiner's statement

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

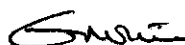
4.1.1. which gives me reasonable cause to believe that in any material respect the requirements:

to keep accounting records in accordance with section 386 of the Companies Act 2006; and

to prepare accounts 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

4.1.2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



17th July 2012

Mr G White, ACMA
41 Gibson Close
Abingdon
Oxfordshire
OX14 1XS

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STATEMENT OF FINANCIAL ACTIVITIES

FOR THE YEAR ENDED 31 MARCH 2012

	Note	Unrestricted Funds	Restricted Funds	Total Funds 2012	Total Funds 2011
INCOMING RESOURCES					
Incoming resources from generated funds		76,717	8,963	85,680	165,574
Incoming resources from charitable activities		68,155	0	68,155	6,807
Other incoming resources	4	360	0	360	20
Total incoming resources	6	145,232	8,963	154,195	172,401
RESOURCES USED					
Cost of generating funds		5,973	0	5,973	7,393
Charitable activities		159,445	350	159,795	211,010
Governance costs		975	0	975	1,092
Other resources used		424	0	424	679
Total resources used	5	166,817	350	167,167	220,174
NET MOVEMENT IN FUNDS		(21,585)	8,613	(12,972)	(47,773)
FUNDS BROUGHT-FORWARD		116,593	2,000	118,593	166,366
FUNDS CARRIED-FORWARD		95,008	10,613	105,621	118,593

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BALANCE SHEET AS AT 31 MARCH 2012

	Note	Unrestricted Funds	Restricted Funds	Total Funds 2012	Total Funds 2011
CURRENT ASSETS					
Cash at bank and in hand		92,075	10,613	102,688	122,926
Debtors		14,077	0	14,077	0
Total		106,152	10,613	116,765	122,926
LIABILITIES					
Creditors: Amounts falling due within one year	10	11,144	0	11,144	4,333
NET ASSETS LESS LIABILITIES	11	95,008	10,613	105,621	118,593
REPRESENTED BY:					
Unrestricted Funds		95,008	0	95,008	116,593
Restricted Funds		0	10,613	10,613	2,000
TOTAL FUNDS	11	95,008	10,613	105,621	118,593

The notes on Pages 12 to 15 form part of these financial statements.

Signed for and on behalf of the Trustees:

Print Name: HILARY BEALE

Signature: H.A. Beale

Date: 12.07.2012

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1. PRINCIPAL ACCOUNTING POLICIES

The principal accounting policies adopted in the preparation of the Financial Statements are detailed in the paragraphs below.

1.1 Accounting Convention The financial statements have been prepared under the historical cost convention, and are in accordance with applicable accounting standards. In preparing the financial statements, the Charity follows best practice as set out in the Statement of Recommended Practice, Accounting and Reporting by Charities 2005 (SORP 2005) commencing 1 April 2005.

1.2 Funds Accounting In accordance with the SORP the funds have been analysed under the following specific headings:

1.2.1 Unrestricted Funds These funds are available for any purpose within the aims and objectives specified in the governing documents. Unrestricted funds can still be designated for specific purposes.

1.2.2 Restricted Funds Restricted Funds must be spent on the purpose specified by the donor.

1.3 Incoming Resources Income is recognised when received, or when due under a legally enforceable contract.

1.4 Resources Expended and Basis of Allocation of Costs Expenditure is included on an accruals basis. Costs directly attributable to a specific charitable activity have been charged to that activity.

1.5 Governance Costs Governance costs represent the costs associated with the strategic management of the Charity.

1.6 Capitalisation and Depreciation of Tangible Fixed Assets All assets costing more than £500 are capitalised. Office equipment is written off by the straight line method over its useful life of 5 years.

1.7 Tax Status As a registered charity, the company is exempt from taxation other than Value Added Tax.

2. CHANGES TO PREVIOUS YEAR'S ACCOUNTING POLICIES

2.1 Income from the IMCA contract is shown in the Statement of Financial Activities under charitable activities, whereas in the previous year it was shown under generated funds. The contract sum was £61,000 in each year.

2.2 Only direct costs have been allocated to funds, whereas in previous years support costs were also allocated.

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3. NET INCOMING/(OUTGOING) RESOURCES

Net incoming resources are stated after charging:	2012	2011
	£	£
Independent Examiner's remuneration	150	250

4. OTHER INCOMING RESOURCES

	2012	2011
	£	£
Sundry Income	360	20

5. ANALYSIS OF TOTAL RESOURCES EXPENDED

	2012	2011
	£	£
Cost of generating funds	5,973	7,393
Charitable activities		
General advocacy work	74,684	39,551
All-age Dementia Advocacy Project (ADAPt)	15,281	29,724
Citizen Advocacy for People of Oxfordshire with a Learning Disability (CAPOLD)	23,455	33,038
Oxfordshire Short Term Advocacy Scheme (OSTAS)	22,364	32,518
Independent Mental Capacity Advocacy (IMCA)	21,290	63,115
Relevant Person's Representative Training	2,371	3,828
Governance	350	9,236
Other resources used	975	1,092
	424	679
Total Resources Expended	<u>£167,167</u>	<u>£220,174</u>

6. ANALYSIS OF INCOMING RESOURCES

	2012	2011
	£	£
Grant – Oxfordshire Social and Community Services	49,168	52,350
Oxfordshire County Council IMCA service	61,000	61,000
Oxfordshire County Council / Learning Disability Partnership Board	12,763	9,546
Comic Relief – CAPOLD	0	25,507
Other grants	22,250	16,250
Donations	1,345	0
Advocacy income	7,155	6,807
Training	0	600
Bank interest	154	322
Other	360	19
Total	<u>154,195</u>	<u>£172,401</u>

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7. EMPLOYEE COSTS

	2012 £	2011 £
7.1 Staff costs:		
Salaries	111,633	130,777
National Insurance costs	7,915	10,890
	<u>£119,548</u>	<u>£141,667</u>

7.2 No employee received more than £60,000 per annum.

7.3 The average number of employees during the year, calculated on a full time equivalent basis, was 4.4 which compares with 5.4 in the previous year. This figure is based on paid contracted hours, whereas the costs at 7.1 include overtime.

8. RESERVES

Total Reserves as at 31st March 2012:

	2012 £	2011 £
Unrestricted funds	95,008	116,593
Less:		
Unrestricted Funds which could only be realised by disposal of fixed assets held for charity use.	0	0
Total Reserves	<u>£95,008</u>	<u>£116,593</u>

9. TANGIBLE ASSETS

Fixed assets have all been fully depreciated.

10. LIABILITIES: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2012 £	2011 £
Operating creditors	7,656	4,333
Social security and other taxes	3,488	0
	<u>£11,144</u>	<u>£4,333</u>

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11. FUNDS

The table below is a summary of the transactions in the year on the various funds. IT Development and Training still retains balances because the restricted grants have yet to be fully spent. Deficits on all the other funds have been met by transferring funds from the General Fund.

	Balance brought forward	Net Incoming/ (Outgoing) Resources Before Transfers	Transfers	Balance carried forward
Unrestricted Funds	£	£	£	£
General	116,593	(10,630)	(10,955)	95,008
ADAPT	0	(15,273)	15,273	0
CAPOLD	0	(14,065)	14,065	0
IMCA	0	39,730	(39,730)	0
OSTAS	0	(18,976)	18,976	0
Relevant Person's Rep	0	(2,371)	2,371	0
Total Unrestricted	116,593	(21,585)	0	95,008
Restricted Funds				
IT Development	2,000	5,000	0	7,000
Training	0	3,613	0	3,613
Total Restricted Funds	2,000	8,613	0	10,613
Total Funds	118,593	(12,972)	0	105,621

12. NET ASSETS.

The Trustees consider that the net assets available are adequate to enable the charity to fulfil its obligations.

13. TRUSTEES' EXPENSES AND EMOLUMENTS.

Payments were made to two trustees during the year to cover travel costs. The total costs incurred were:

2012	2011
£	£
<u>£811</u>	<u>£842</u>