INCLUDE ME (SCIO)

REPORT AND UNAUDITED FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2026

CHARITY NUMBER: SC050528

Henderson Black & Co

CHARTERED ACCOUNTANTS, ST ANDREWS

Include Me (SCIO)

Contents of the Report and Unaudited Financial Statements

For the Year Ended 31 March 2026

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Include Me (SCIO)

Trustees' Report

For the Year Ended 31 March 2026

The trustees have pleasure in presenting their report together with the financial statements for the year ended 31 March 2026.

Charitable purposes

The charity's purposes are:

- Promote the welfare of vulnerable people - being those who are affected by disability, chronic illness, dementia, mental illness, learning disability, personality disorder, or any other analogous characteristic - in the geographical area through the provision of citizen advocacy services.
- Promote and protect the rights of vulnerable people, allowing them to work towards their dreams and aspirations and achieve their full potential.
- Provide vulnerable people with opportunities for involvement in all aspects of society and enable them to make decisions about their own life as far as is possible.
- Inform and educate the public at large on the issues facing vulnerable people within their communities, to encourage the acceptance of all vulnerable people as equal citizens with gifts, talents, and something to offer.
- Encourage the active presence of all vulnerable people in all aspects of community life.

Report from Chairperson

Introduction

The past 12 months has followed a similar pattern to the previous reporting period, with many of the challenges we encounter as a charity raising their heads again.

Our main challenges remain the same: funding for running costs, and recruitment of volunteers to fill the role of advocate. This is not unique to Include Me and many charities across Scotland continue to report that they are facing the same issues. This has not phased our staff and trustees, and I am pleased to confirm that over the year 2025-2026, Include Me has continued to deliver a highly effective contribution to the charity sector, achieving a consistent first-class standard of Citizen Advocacy throughout Northeast Fife.

As detailed in our report, our running costs are covered by an annual grant from Fife Council, and I would like to start by expressing our extreme gratitude to everyone at Fife Council for their continued support. Like many departments across government, there is pressure on funding, so we were very grateful to receive ongoing funding for the next 12 months. The charity is very grateful to Mr Chris Campbell, and to Laura Caldicott, our Fife Council Link Officer for their exceptional support and hard work in helping us through a very difficult and worrying period.

As stated, our other main challenge has been recruiting volunteers for the role of advocate. This has been a huge challenge, which takes up a great deal of our time and energy. It remains our number one priority, and we are continuously looking for new and innovative strategies to improve our take up. We recently held a strategic planning meeting and recruitment of volunteers was number one on our agenda. We have used every tool at our disposal to promote the excellent work we do, and through advertising and networking we continue to attract a constant trickle of volunteers. We regularly review our procedures and look to develop and implement new cost-effective strategies to meet this head on. We are using social media to spread the word of the great work we do and continually update our website and advertise in local publications across Northeast Fife. Our staff regularly go to fairs and to busy shopping areas, but our best source to find volunteers remains word of mouth in the local community.

We will continue to meet the challenges head on and will endeavour to meet the demands thrust upon us. We are actively looking at new strategies for recruiting and training new advocates and are always looking to improve how we support our partners. Our committee and staff believe in a team ethos and continue to work very closely together, which ensures we always provide a professional and high level of support to those who we support.

Notes of Appreciation

Running the charity and maintaining these high standards does not come easy and it would be remiss of me not to highlight the outstanding efforts of those individuals who have contributed so much to our charity over the past 12 months.

Advocates

First and foremost, we must once again say a huge thank you to our Advocates, who have continued to provide the highest level of support to our partners. These volunteers are very much on the front line, working to build and maintain confident and strong relationships with their partners, and in the process helping to change their lives for the better.

All our advocates are extremely dedicated, highly motivated, passionate and selfless individuals who really care about their partners and are prepared to deal with any issue no matter how complex. The support they continue to provide to their partners is truly remarkable and everyone involved in the charity are extremely grateful for their outstanding commitment.

Committee Members

Our current committee, Marina Sinclair (Secretary), Liz Loudon (Treasurer), Gary Ovenstone, Louise Durie and Liz Allen (Committee Members), are extremely talented and highly motivated individuals who provide a high level of support to the charity. They are all volunteers and have once again demonstrated the highest level of dedication, professionalism, and selfless commitment to ensure Include Me has continued to produce the highest standards of performance, governance and efficacy. They all bring a breadth of experience from working with other charities and in the business sector and I am hugely grateful for their drive, commitment and endless support.

Stewardship Group

Our Stewardship Group currently consists of five members who meet regularly with our Support Workers and provide unique and individual insights through their lived experiences of disability and/or mental health issues. As an organisation led by the experiences of the people we support, the Stewardship Group plays a pivotal role in helping ensure that those individuals remain front and centre of what we do and how we do it. We are all extremely grateful for their outstanding commitment to supporting the Stewardship Group.

Staff

We are very privileged to have two highly dedicated, knowledgeable, professional, and enthusiastic staff members, Helen Glass and Leesa Gilchrist, who continue to lead the line for Include Me. Their energy and drive are exceptional and they are always looking at new, innovative, and inventive methods to improve the delivery of advocacy in Northeast Fife. They are a truly exceptional team, working together to ensure that the partnerships can flourish and develop with ease.

Not content with just working with our charity they regularly collaborate across the other advocacy charities in Fife to share best practice throughout the sector. They are both consummate professionals, and we are very grateful for the exemplary work they consistently deliver, and for the high level of support and advice they provide to the committee and our Advocates.

This year they once again demonstrated the most selfless act by taking another voluntary reduction in working hours and wages so our charity could continue to operate. Include Me are very fortunate and very grateful to have Helen and Leesa leading the line for us.

Link Support Officer

On behalf of all members of Include Me, we would like to say a very special and heartfelt thank you to our Link Support Officer, Laura Higginson (nee Caldicott), for her hard work and steadfast support to our charity; we are extremely grateful for her honest, pragmatic, and timely advice, which is always well received. We look forward to continuing to work with Laura in the coming 12 months in a professional and positive manner.

Other Parties

Finally, I would like to say thank you to everyone outside the charity who have provided support and have flown our flag:

Our local Councillor, Ann Verner has supported Include Me in many ways over the reporting period, including helping with fund raising and advertising our charity whenever the opportunity arises. We are extremely grateful that she takes time out of her very busy schedule to promote our excellent work and look forward to continuing this very positive relationship going forward.

Summary

What we provide as a charity is truly exceptional and at every level, we are blessed to have focussed and dedicated individuals who are working tirelessly for the benefit of others. The Management Committee, Staff and outside agencies must continue to work together to ensure we consistently provide the highest level of support to our Advocates and Partners. We must never lose sight of our main goal, which is to create and support the development of Citizen Advocacy Partnerships and in the process ensure these individuals feel valued, can have a voice in society, and if they choose, to be active participants in their local community.

We should always be looking for ways to improve the way we deliver Citizen Advocacy, and our support for our amazing Advocates, but if we do make any changes, they must be measured, specific, long term sustainable and ultimately, improve the way the charity operates; we should never change just for the sake of change. All personnel involved with the charity should feel extremely proud of the outstanding contribution they are making to changing and improving the lives of those who rely on our Citizen Advocacy services. We must take every opportunity to engage with the wider public, get our message out there and to promote ourselves in a positive light.

Thank you everyone for your outstanding service to our amazing charity.

Include Me (SCIO)

Trustees' Report

For the Year Ended 31 March 2026

Objectives and activities

Include Me Citizen Advocacy Service in Northeast Fife
Our aim is to enhance personal choice and community participation for vulnerable adults through citizen advocacy, supporting them to say what they want, secure their rights, represent their interests and obtain the services they need.

Funded by Fife Health & Social Care Partnership, Include Me provides a free, independent citizen advocacy service in North-East Fife to vulnerable adults aged 16 – 65 who are affected by disability, chronic illness, dementia, autism spectrum disorder or mental disorder (including mental illness, learning disability or personality disorder), and who need support to safeguard their own-wellbeing, rights, care or other interests.

Include Me is managed by a volunteer management committee and staffed by two part-time development workers. It is their role to:

- Recruit suitable volunteers
- Train volunteers to become citizen advocates
- Match volunteers to referred people who meet the criteria
- Support the advocacy partnerships

Together, our organisation works in partnership with our citizen advocates and their advocacy partners. Our advocacy partnerships are underpinned by the principles of; Independence, Loyalty, Self-Direction and Equality with advocates endeavouring to be always instructed or directed by their advocacy partner. Advocates also enable their advocacy partners to self-advocate as far as possible – it is an empowering relationship. Our citizen advocates support people to get the information they need and to consider their options; they support people to be listened to, respected and understood.

Non-Instructed Advocacy
Some of our Advocacy Partners lack the capacity to instruct their advocates in either some or all of the work the advocate is undertaking with them. Using training and by building relationships with their partner – and those who know them best- our citizen advocates work hard to understand what is important to their advocacy partner, to ensure that they can be part of and influence decisions being made and that their rights are upheld. Our advocates try to ensure that certain decisions are taken with due consideration for all relevant factors which include the person's unique preferences and perspectives.

Events

Land's End to John O'Groats in aid of charity!
Our chairman, John McBride, along with a long-time friend took on the mammoth task of a charity walk from Land's End to John O'Groats in aid of four charities of which Include Me was one of the lucky recipients. They set off on March 23rd and completed the journey at the beginning of June covering in total 1250 miles of which 80% were off-road. Their perseverance and endurance in the face of numerous challenges was an inspiration to us all as we followed their progress on social media. They raised over £16,000 of which Include Me received 10%. All of us are extremely grateful to John's commitment to the charity, and to Gary Overstone who picked up the reins as acting chairman during his absence and ensured the charity continued to function smoothly.

Summer BBQ
We held our annual summer BBQ at Craigtoun Park for our partnerships and volunteers. This proved a hit with everyone (despite the wet weather). Thank goodness we had the use of the 'hut'! It was good to come together socially for both the volunteers and for some of the partners to meet up with friends they used to see regularly before day care facilities were cut back so drastically.

Christmas
We held our regular Christmas Gathering this year in the Cosmos Centre in St Andrews. For the 2nd year, we enjoyed some musical entertainment from 'The Lilting Lassies'. This year we opened the invite to other members of Rymonth House and were delighted when so many joined us to share the afternoon's entertainment.

Afternoon Tea Party
To celebrate our volunteers and their impact, we held an afternoon tea party at the YMCA in Cupar for members of our stewardship group, citizen advocates, and trustees as a small way of saying thank you.

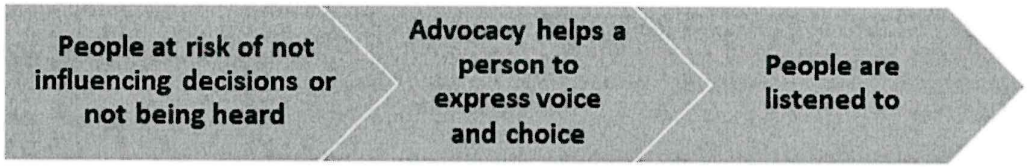
Achievements and performance

Include Me Citizen Advocacy outcomes

- Increased voice and personal control
- Improved Opportunities
- Challenging injustice
- Increased Independence
- Rights being upheld

Outcomes framework
Our outcomes framework defines outcomes in four impact areas. These are where we anecdotally hear stories of our advocacy service making a difference:

- In the lives of individuals who use the advocacy service
- In the way that the health and social care sector delivers and responds to advocacy partners
- In the way communities can support people to be included and enriched by advocacy partners' full participation and involvement
- In the way that our advocacy service learns, develops and grows



We find the above diagram best fits the nature of the long-term advocacy partnerships that we support as advocacy is often involved with outcomes that need to be seen as 'working towards' but not always 'accomplished'. By focusing on how the intervention is meant to work, the focus becomes on the extent to which the outcomes have been achieved.

We gathered and collated evidence from questionnaires, reviews and discussions. This demonstrates the significant positive impact and outcomes of Include Me Citizen Advocacy:

During an annual review of advocacy partnership partner S stated her advocate *"is like a family friend that I can share my worries with, she is excellent, the absolute best ... the perfect fit for me as an advocate!"*

While C stated at his partnership review, that he had gained greatly from his advocates' support, *"I feel the support I've received has given me a basic idea of my rights, and the confidence to stand up for them if I have to". "Advocacy enabled me to get used to regular social contact and friendships; in a way I had previously not been able to due to my disability."*

Responses from volunteer advocates revealed that 100% of those surveyed felt that citizen advocacy had empowered their partners to engage more actively in decision-making, with 75% agreeing and 25% strongly agreeing. Furthermore, 100% of advocates indicated that citizen advocacy had facilitated the development of new support networks for partners within the community, effectively reducing social isolation and increasing the likelihood of the person utilising appropriate community services.

Feedback from one volunteer advocate when asked if they would recommend Citizen advocacy - *Absolutely yes! Makes a real difference to people's lives and it is a privilege to be in this special advocate-partner relationship. Great support from the Include Me staff, both routine and if an issue arises".*

Separate surveys were also administered to stakeholders. Remarkably, 100% of respondents indicated that they believed the advocate partnership had positively influenced partners' engagement in decision-making and their understanding of their rights.

A health and social care key worker remarked on a non-instructed advocacy partnership, stating,
"E is great with P and always has P's best interests at heart and looks for ways to do things that will make P's life easier. She is also always a great help to me, keeping me up to date with Hillcrest Reviews :). Hillcrest staff have really enjoyed the fortnightly outings with P and E".

Looking Forward
Looking forward for the next 12 months our priorities are as follows:

- To sustain our current high standards of management of the charity; in particular, sound financial planning, efficient management and governance, accountability, and transparency.
- Continue to provide the highest level of support to our advocates and partners.
- Continue to recruit, train and pair up more high-quality advocates.
- Promote Include Me using all available media and social networking options and continue to raise awareness of the importance of independent advocacy and citizen advocacy.
- When required, to recruit more high-quality personnel to the committee.
- Continue to work with other charitable organisations to share best practice.

Reserves policy
The trustee's policy is to hold reserves to meet normal running costs for a minimum of three months and in addition to hold sufficient funds to cover possible future redundancy costs.

Risk assessment
The trustees have assessed the major risks to which the charity is exposed and are satisfied that systems are in place to mitigate the charity's exposure to the major risks.

Financial review
At 31 March 2026 the charity had unrestricted funds of £17,325 (2025 - £11,761) and restricted funds of £7,434 (2025 - £8,648). The main source of funding for the charity is from grants and during the year grants of £43,769 (2025 - £46,817) were received. Payments for the year were £41,747 (2025 - £52,163) with wages of £34,804 (2025 - £43,609) being the main expenditure.

Structure, Governance and Management
The charity is a Scottish Charitable Incorporated Organisation (a SCIO). It is governed by its constitution which was adopted on 1 January 2021.

The charity is managed by its board of trustees who meet on a regular basis, both in person and online to discuss strategic direction, governance and the day to day running of the charity.

The trustees and members of the committee undertake their duties on a voluntary basis.

This year's AGM was held in person in the Holy Trinity Church Hall, St Andrews on Wednesday 1st October 2025.

Trustee recruitment and appointment
Potential committee members must submit an application to join the trustees. Recruitment may be made both from those already working within the charity(advocates) or from outside the charity. The Trustees will consider the experience and knowledge new members will bring to the charity. Any new Trustees need to be formally accepted at the following AGM. Outside organisations cannot appoint Trustees to Include Me.

Include Me (SCIO)

Trustees' Report

For the Year Ended 31 March 2026

Reference and Administrative Information

Charity name
Include Me (SCIO)
Charity number
SC050528
Contact Address
c/o Henderson Black & Co, Chestney House, 149 Market Street, St Andrews, Fife, KY16 9PF
Independent Examiner
Jonathan L. Adamson CA
Bankers
The Royal Bank of Scotland

Current Trustees

John McBride MBE	Chairperson
Liz Allan	
Louise Durie	
Elizabeth Loudon	Treasurer
Gary Ovenstone	(resigned April 2026)
Marina Sinclair	Secretary

Statement of Trustees' Responsibilities
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, which they are responsible for preparing, comply with the Charities Accounts (Scotland) Regulations 2006 (as amended) and the terms of the charity's Constitution. The applicable law also sets out the responsibilities of the trustees for the preparation and content of the Annual Report.

Approved by the trustees and signed on their behalf by:



E. Loudon

John McBride MBE
(Chairperson)

Date: 7/10/26

Elizabeth Loudon
(Treasurer)

Date: 05/10/2026

Include Me (SCIO)

Independent Examiner's Report to the Trustees of Include Me (SCIO)

I report on the accounts of the charity for the year ended 31 March 2026 which are set out on pages 10 to 13.

Respective Responsibilities of the Trustees and Examiner
The charity's trustees are responsible for the preparation of the accounts in accordance with the terms of the Charities and Trustee Investment (Scotland) Act 2005 ("the 2005 Act") and the Charities Accounts (Scotland) Regulations 2006 (as amended) ("the 2006 Regulations"). The charity's trustees consider that the audit requirement of Regulation 10(1) (d) of the 2006 Regulations does not apply. It is my responsibility to examine and report on the accounts under section 44(1) (c) of the 2005 Act and to state whether particular matters have come to my attention.

This report is made to the trustees, as a body, in accordance with the terms of my engagement. My work has been undertaken so that I might state to the trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the trustees for my work or for this report.

Basis of Independent Examiner's Statement
My examination is carried out in accordance with Regulation 11 of the 2006 Regulations. 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 seeks 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 view given by the accounts.

Independent Examiner's 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 requirements:-
   - to keep accounting records in accordance with Section 44 (1)(a) of the 2005 Act and Regulation 4 of the 2006 Regulations, and
   - to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Regulations have not been met, or

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

Henderson Black & Co

Jonathan L Adamson CA
Partner
Henderson Black & Co
Chartered Accountants

Chestney House
149 Market Street
St Andrews
Fife, KY16 9PF

Date: 10/09/2026

Include Me (SCIO)

Statement of Receipts and Payments for the year ended 31 March 2026

	Note	Unrestricted General Fund	Restricted Funds	Total Funds 2026	Unrestricted General Fund	Restricted Funds	Total Funds 2025
		£	£	£	£	£	£
Receipts							
Fife Council Grants		43,769	-	43,769	42,911	3,906	46,817
Donations		2,251	-	2,251	1,907	-	1,907
Bank interest		77	-	77	117	-	117
Other income		-	-	-	700	-	700
Total receipts		46,097	-	46,097	45,635	3,906	49,541
Payments							
Cost of charitable activities	6	40,053	1,214	41,267	47,718	3,995	51,713
Governance costs:							
Independent examiner's fee		480	-	480	450	-	450
Total payments		40,533	1,214	41,747	48,168	3,995	52,163
Surplus/(deficit) for the period		5,564	(1,214)	4,350	(2,533)	(89)	(2,622)

The notes on page 12 and 13 form an integral part of these accounts.

Include Me (SCIO)

Statement of Balances
as at 31 March 2026

	Unrestricted General Fund	Restricted Funds	Total 2026	Unrestricted General Fund	Restricted Funds	Total 2025
	£	£	£	£	£	£
Opening cash at bank and in hand	11,761	8,648	20,409	14,294	8,737	23,031
Surplus/(deficit) for the period	5,564	(1,214)	4,350	(2,533)	(89)	(2,622)
Closing cash at bank and in hand	17,325	7,434	24,759	11,761	8,648	20,409
Bank and Cash Balances						
Bank accounts	17,325	7,434	24,759	11,761	8,648	20,409
	17,325	7,434	24,759	11,761	8,648	20,409
Assets						
Office equipment	-	-	-	-	188	188
	-	-	-	-	188	188
Liabilities						
PAYE	128	-	128	474	-	474
Pensions	540	-	540	606	-	606
Independent examiner's fee	504	-	504	474	-	474
	1,172	-	1,172	1,554	-	1,554

The notes on page 12 and 13 form an integral part of these accounts.

Approved by the trustees and signed on their behalf by:

E. Loudon

John McBride MBE
Chairperson

Date: 7/10/26

Elizabeth Loudon
Treasurer

Date: 05/10/2026

Include Me (SCIO)

Notes to the Accounts
for the year ended 31 March 2026

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1 Principal Accounting Policies

Charity information

Include Me SCIO is a registered charity, governed by its constitution. It is a registered charity with the Office of the Scottish Charity Regulator. The operational address is c/o Henderson Black & Co, Chestney House, 149 Market Street, St Andrews, Fife, KY16 9PF.

1.1 Basis of Accounting

These accounts have been prepared on the Receipts and Payments basis in accordance with the Charities & Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). The financial statements are prepared in sterling, which is the functional currency of the charity.

1.2 Nature and purpose of funds

Unrestricted funds are those that may be used at the discretion of the trustees in furtherance of the objects of the charity. The trustees maintain an unrestricted general fund for the day-to-day running of the charity.

Restricted funds relate to grants received for a specific purpose as set out in note 7.

2 Related party transactions

No expenses were reimbursed to trustees during the year (2025 - none).

3 Trustees' remuneration

No remuneration was paid in the year (2025 - none).

4 Control

Control of the charity lies in the hands of the trustees.

5 Donated services and facilities

The value of work done by trustees in giving of their time for meetings and other matters on behalf of the charity is not reflected in the accounts as it cannot be quantified.

Notes to the Accounts
for the year ended 31 March 2026

6 Cost of charitable activities

	Unrestricted Funds	Restricted Funds	Total 2026	Unrestricted Funds	Restricted Funds	Total 2025
Staff salaries	34,804	-	34,804	41,066	2,543	43,609
Pension contributions	1,623	-	1,623	2,113	-	2,113
Travel expenses	1,956	333	2,289	2,175	135	2,310
Postage, stationery and computer supplies	472	94	566	483	330	813
Adverising	-	-	-	23	380	403
Telephone and internet	94	-	94	351	-	351
Insurance	372	-	372	372	-	372
Payroll fees	540	-	540	540	-	540
Sundry expenses	192	787	979	595	607	1,202
	40,053	1,214	41,267	47,718	3,995	51,713

7 Movement in funds 2026

	At 1 April 2025	Income	Expenditure	Transfer to Unrestricted	At 31 March 2026
Restricted funds					
St Andrews Community Trust	1,453	-	(94)	-	1,359
Fife Voluntary Action	5,832	-	(1,090)	-	4,742
Fife Council	1,363	-	(30)	-	1,333
	8,648	-	(1,214)	-	7,434
Unrestricted funds:					
General funds	11,761	46,097	(40,533)	-	17,325
Total funds	20,409	46,097	(41,747)	-	24,759

Movement in funds 2025

	At 1 April 2024	Income	Expenditure	Transfer to Unrestricted	At 31 March 2025
St Andrews Community Trust	2,163	-	(710)	-	1,453
Fife Voluntary Action	6,574	-	(742)	-	5,832
Fife Council	-	3,906	(2,543)	-	1,363
	8,737	3,906	(3,995)	-	8,648
Unrestricted funds:					
General funds	14,294	45,635	(48,168)	-	11,761
Total funds	23,031	49,541	(52,163)	-	20,409

Purpose of restricted funds

St Andrews Community Trust: Grant towards the Advocacy Without Barriers project.

Fife Voluntary Action: Grant towards the Exploring Communities Together project.

Fife Council : Grant towards the Citizen Advocacy for vulnerable individuals aged 65+ in North-East Fife project.