#### **INCLUDE ME SCIO**

#### REPORT AND UNAUDITED FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2025

**CHARITY NUMBER: SC050528** 



#### **Contents of the Report and Unaudited Financial Statements**

#### For the Year Ended 31 March 2025

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#### Trustees' Report

#### For the Year Ended 31 March 2025

The trustees have pleasure in presenting their report together with the financial statements for the year ended 31 March 2025.

#### 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

Once again this has been an extremely challenging but very rewarding year for our charity. Our main challenges remain the same: funding and recruiting volunteers to fill the role of advocate. This is not unique to Include Me and many charities across Scotland are facing the same issues. This has not phased our staff and trustees, and I am pleased to confirm that in the year 2024-2025, 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. Like many departments across government, they have had to make substantial savings, and the charity sector has been targeted as part of this legislation. After extensive work by the staff and trustees and a face-to-face meeting with Fife Council, a fair and amicable agreement was reached which ensures ongoing funding for this financial year. The charity is very grateful to and to 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 since the COVID pandemic and finding volunteers appears to be an issue affecting the charitable sector all over Scotland. 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 have totally transformed our website, we advertise in local publications across Northeast Fife and on the internet, 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.

#### Trustees' Report

#### For the Year Ended 31 March 2025

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 their 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, Advisor), (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

#### Staff

We are extremely lucky to have two highly dedicated, knowledgeable, professional, and enthusiastic staff members, who continue to use fresh, 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. 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 demonstrated the most selfless act by taking a voluntary reduction in working hours and wages so our charity could continue to operate. Include Me is very fortunate and very grateful to have

#### Trustees' Report

#### For the Year Ended 31 March 2025

# Link Support Officer On behalf of all members of Include Me, I would like to say a very special and heartfelt thank you to our Link Support Officer, 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 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, 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.

A special thank you goes to everyone at the St Andrews Community Trust for their continued financial support, which has allowed us to run special projects, in support of our partnerships.

Include Me are very grateful to Hendersons Black & Co for providing a high level of professional financial advice to our committee. We look forward to continuing this excellent relationship over the next 12 months.

Lastly, we would like to thank the members of St Rule Golf Club who donated a sizeable cash donation, which has helped us considerably.

#### 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.

#### Trustees' Report

#### For the Year Ended 31 March 2025

#### 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 includes the person's unique preferences and perspectives.

#### **Events**

This year for the first time, we held a summer BBQ at Craigtoun Park for our partnerships and volunteers. This proved a hit with everyone. 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.

We also held our regular Christmas Gathering which this year took place in the Cosmos Centre in St Andrews. A local group 'The Lilting Lassies' provided some musical entertainment with some members enthusiastically joining in. These events are often the only time some of the trustees get to see the positive effects citizen advocacy has on those involved and it is wonderful to witness.

#### Trustees' Report

#### For the Year Ended 31 March 2025

#### Achievements and performance

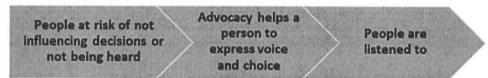
#### Include Me Citizen Advocacy outcomes

- 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:

From the responses of volunteer advocates, it was revealed that 100% of those surveyed felt that citizen advocacy had empowered their partners to engage more actively in decision-making processes, with 57% agreeing and 43% strongly agreeing with this assertion. Furthermore, 87% of advocates indicated that citizen advocacy had facilitated the development of new support networks for partners within the community, effectively reducing social isolation.

Additionally, 72% of respondents agreed that their involvement with the individual had increased the likelihood of the person utilizing appropriate community services. One advocate highlighted their role in safeguarding a partner's rights and well-being by promptly raising concerns with staff regarding observable changes in the individual's condition, which led to timely medical advice and the prevention of a more serious health issue.

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, with 29% agreeing and 71% strongly agreeing.

#### Trustees' Report

#### For the Year Ended 31 March 2025

A health and social care key worker remarked on a non-instructed advocacy partnership, stating,

"The Include Me advocate does an exceptional job, always prioritizing the individuals' best interests and advocating effectively on their behalf. The advocate maintains excellent communication with staff, ensuring a seamless process, and the individual partner could not ask for a better advocate."

Another stakeholder, (a care manager), expressed a strong belief that:

"Individuals supported by Include Me advocates experienced an improvement in their overall well-being".

The following quotes are from Mr C during a partnership annual review meeting with Mr C and his advocate. Advocacy referral was made initially to help Mr C, an 18-year male with ASD, understand and make informal decisions about his life. The Advocate supported Mr C to develop his interest in graphic design and animation resulting in Mr C publishing his own comic book series. Mr C has continued to grow in confidence and independence during the five years of the partnership. Mr C moved to his first tenancy on his own in 2024. Mr C appreciates his relationship with his Citizen Advocate and the difference this makes.

Mr C completed a survey questionnaire and commented that:

"I believe my support has helped me to get more used to talking to people. I feel more confident talking to someone who I know will respond in a non-judgemental, unbiased way. Also, I find it easier to broach certain subjects which I might otherwise have not felt comfortable discussing with my own family or other friend groups ...... Advocacy enabled me to get used to regular social contact and friendships; in ways I had previously not been able to due to my disability."

#### Mr C went on to state:

"I feel that advocacy has enabled me to better express what I actually want, rather than just saying what I think people will want to hear from me. Crucially, I know my advocate will respond in a way that is both non-judgemental and free from personal bias. Around the time I was first looking into advocacy support, I was being persuaded to try all sorts of social events and clubs. I feel that having that support not only enabled me to push forward with those things I wanted to stick with but also gave me the confidence to make it quite clear which things I did not want to go forward with. ..... One of the main factors behind me choosing to give advocacy support a go was the fact that it struck a neat balance between giving me the support I needed, while also letting me have a proper say in how I received that support."

#### **Looking Forward**

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

- Increased voice and personal control 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 improve our methods of communication. Our new website is now completed and operational.
- 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, recruit more high-quality personnel to the committee.
- Continue to recruit, train and pair up more high-quality advocates.
- Continue to work with other charitable organisations to share best practice.

#### Trustees' Report

#### For the Year Ended 31 March 2025

#### Reserves policy

The trustee's policy is to hold reserves to meet normal running costs for a minimum of three months.

With the ongoing difficulty in acquiring new external funding the trustees have taken steps to reduce expenditure where possible and staff have restructured their working hours for the upcoming year to ensure financial sustainability

#### 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 2025 the charity had unrestricted funds of £11,761 (2024 - £14,294) and restricted funds of £8,648 (2024 - £8,737). The main source of funding for the charity is from grants and during the year grants of £46,817 (2024 - £42,069) were received. Payments for the year were £52,163 (2024 - £41,784) with wages of £43,609 (2024 - £32,128) 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 has seen several changes	within the management committee.	We said goodbye to
our outgoing Treasurer in A	August after just over three years with the	ne charity.
up into the role and	took on the role of secretary.	

#### 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.

Two new members joined the trustees in 2024,	(a current advocate) who brings a wealth of
knowledge and experience in communicating with tho	se with learning disabilities, and
her experience in financial matters as well as a varied	portfolio in charity work.

Both new trustees were ratified at the AGM held on 26 September 2024.

#### Trustees' Report

#### For the Year Ended 31 March 2025

#### **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

#### **Bankers**

The Royal Bank of Scotland

#### **Current Trustees**



#### 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 on 23 October 2025 and signed on their behalf by:



#### 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 2025 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
- to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

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Partner Henderson Black & Co Chartered Accountants

27 October 2025

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

Include Me SCIO

Statement of Receipts and Payments for the year ended 31 March 2025

		Unrestricted General Fund	Restricted Funds	Total Funds 2025	Unrestricted General Fund	Restricted Funds	Total Funds 2024
Receipts	Note	3	3	£	2	2	3
neceipts							
Fife Council Grants		42,911	3,906	46,817	42,069		42,069
Donations		1,907	-	1,907	134	2	134
Bank interest		117		117	-	-	-
Other income		700	7	700		-	7
Total receipts		45,635	3,906	49,541	42,203		42,203
Payments							
Cost of charitable activities	6	47,718	3,995	51,713	39,333	1,466	40,799
Governance costs		450	-	450	420	-	420
Purchase of fixed assets						565	565
Total payments		48,168	3,995	52,163	39,753	2,031	41,784
(Deficit)/surplus for the perio		(2,533)	(89)	(2,622)	2,450	(2,031)	419

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

Include Me SCIO

## Statement of Balances as at 31 March 2025

	Unrestricted		U	nrestricted		
	General	Restricted	Total	General	Restricted	Total
	Fund	Funds	2025	Fund	Funds	2024
	£	2	£	£	2	2
Opening cash at bank and in hand	14,294	8,737	23,031	11,844	10,768	22,612
(Deficit)/surplus for the period	(2,533)	(89)	(2,622)	2,450	(2,031)	419
Closing cash at bank and in hand	11,761	8,648	20,409	14,294	8,737	23,031
Bank and Cash Balances						
Bank accounts	11,761	8,648	20,409	14,294	8,737	23,031
	11,761	8,648	20,409	14,294	8,737	23,031
Assets						
Office equipment		188	188	1,440	1,013	2,453
	-	188	188	1,440	1,013	2,453
Liabilities						
PAYE	474		474	1,328	×	1,328
Pensions	606	1	606	568		568
Independent examiner's fee	474		474	360		360
	1,554		1,554	2,256	-	2,256

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

Approved by the trustees and authorised for issue on 23 October 2025.



## Notes to the Accounts for the year ended 31 March 2025

#### 1 Principal Accounting Policies

#### 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 (2024 - none).

#### 3 Trustees' remuneration

No remuneration was paid in the year (2024 - 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.

Include Me SCIO

#### Notes to the Accounts for the year ended 31 March 2025

		Unrestricted					
		Funds	Restricted Funds	Total 2025	Unrestricted Funds	Restricted Funds	Total 2024
Staff	salaries	41,066	2,543	43,609	32,128		32,128
Pens	ion contributions	2,113		2,113	857		857
Staff	training			-	190		190
	el expenses age, stationery and	2,175	135	2,310	1,846	26	1,872
	outer supplies	483	330	813	438	479	917
	rising	23	380	403	524	596	1,120
Telep	phone and internet	351	-	351	324	-	324
Insur		372		372	1,449	-	1,449
Payro	oll fees	540		540	637		637
Sund	ry expenses	595	607	1,202	940	365	1,305
		47,718	3,995	51,713	39,333	1,466	40,799
7 Rest	ricted Fund 2025						
			At 1 April			Transfer to	At 31 March
			2024	Income	Expenditure	Unrestricted	2025
	drews Community Trust		2,163	-	(710)		1,453
	/oluntary Action		6,574	-	(742)		5,832
Fife C	Council			3,906	(2,543)	-	1,363
			8,737	3,906	(3,995)	·	8,648
Restr	ricted Funds 2024						
			At 1 April 2023	Income	Expenditure	Transfer to Unrestricted	At 31 March 2024
St An	drews Community Trust		3,352		(1,189)		2,163
Fife V	oluntary Action		6,820		(246)		6,574
Unive	ersity of St Andrews		596	-	(596)	-	

#### 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.

University of St Andrews: Grant towards the Awareness Raising Funds project.