

APPENDIX 1



Office of the Scottish Charity Regulator

Trustees' Annual Report for the period							
Period start date				Period end date			
	Day	Month	Year		Day	Month	Year
From	01	04	2025	To	31	03	2026

Reference and administration details

Charity name	The Advisory Group
Other names charity is known by	TAG
Registered charity number	SC042972
Charity's principal address	The Square
	70 Renton Street
	Glasgow
	Postcode G4 0HT

Names of the charity trustees on date of approval of Trustees' Annual Report

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	William (Leam) MacKeown	Chairperson		
2	Kirsten Knox	Secretary		
3	Natalia McGregor	Treasurer		
4	Jill Clark			
5	Stewart Mochrie			
6	Paul Cannop			
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Reference and administration details

Names of all other charity trustees during the period, if any, (for example, those who resigned part way through the financial period)

Name	Dates acted if not for whole year

Structure, governance and management

Type of governing document

The Advisory Group was incorporated as a Scottish Charitable Incorporated Organisation (SCIO) and is governed by a written constitution approved by OSCR

Trustee recruitment and appointment

Trustees were recruited and appointed as per the constitution

Objectives and activities

Charitable purposes

The Charitable purposes of The Advisory Group are as follows:

The advancement of education and awareness raising about learning disabilities, through the provision of formal and informal training in educational bodies such as school and further education colleges, as well as in public, private and voluntary sectors, including community groups.

The advancement of citizenship including the rights and responsibilities of the citizen, through the development of opportunities for people with learning disabilities to be more active in their communities, involving people in community activity including volunteering.

The promotion of equality and diversity including the elimination of discrimination.

The relief of those in need by reason of age, ill health, disability, financial hardship or other disadvantage, contributing to the prevention or relief of poverty through information and advocacy.

Summary of the main activities in relation to these objects

Our 12 TAG groups continue to promote our work across the country.

TAG has a Service Level Agreement with Key. Over the past year we have continued to provide facilitation for engagement with the disabled people they support.

Following on from the success of our Game Changers programme, Game Changers Xtra-Time, funded by a second grant from the Big Lottery has been working with young people in transition to adult services to explore the resources available to them in Glasgow with a focus on physical and mental wellbeing. We have co-ordinated a programme of planning and activities to enable the young people to create a pathway by forging new link with community resources, to map out their next steps after they leave school.

We continue to run a rolling programme of accessible activities for disabled people in Glasgow, working with community-based resources. This has included drama, music, sports and arts.

We embarked on a campaign to improve access to banking across Scotland. We have engaged with banks and the banking authorities to explain the issues arising for disabled people in an increasingly digital world and the barriers this is creating.

In April last year we hosted our second Strictly All Ability dance competition. Based on the hit TV show, Strictly Come Dancing, 10 dance disabled dancer paired up with a professional dance partner to perform at a gala performance in Glasgow.

We were commissioned by Key to review their day services in Glasgow. This included facilitating consultation with the people who use the

service and their family carers.

We have worked with Glasgow university to develop a disability awareness training programme. This involved defining the key messages and creating content. This will be promoted in secondary schools across Scotland in the next academic year.

We worked with Stirling University and the Care Inspectorate to provide consultation on the accessibility of complaints procedures.

APPENDIX 1

Achievements and performance

Summary of the main achievements of the charity during the financial period

An important achievement last year was our Banking campaign. This was an issue that had been raised by our member from across the country. Post Covid the reliance on digital banking and the closure of local bank branches was having a disproportionate impact on disabled people. People told TAG of the issues they faced when trying to access their own money. TAG knew it had to support people to raise this message with the banking authorities. Getting the banks to engage was the first hurdle, but by enlisting the help of Glasgow MP Martin Rhodes who raised the issue in the House of Commons and contacted the main high street banks to ask why they were not engaging with our campaign, drastically improved the communication with the banking authorities. TAG established a Banking campaign steering committee who have met with the majority of banks and the banking regulator and have been working closely with the with Cash Access UK and the FCA. Our members have visited a number of the new banking Hubs to review access and have provided reports and feedback on the services they experienced. TAG plan to hold a Banking conference in the coming year.

Over 200 disabled young people have got involved in our Game Changers Xtra-time programme. We have been working directly with individuals to develop a personal Aim to Goal plan and through co-ordinating taster sessions with community-based organisations helped them to explore the options and resources available to them as they move into adult services. A full programme of activities has run throughout the year including sports, digital technology, arts, dance and a host of recreational and vocational opportunities. Feedback from participants and their families has been consistently positive.

We were delighted with the outcomes from our second Strictly All Ability Dance event. Around 500 people attended the inclusive gala performance in the Hilton Hotel in Glasgow. The 10 disabled dancers and their professional partners put on a spectacular show showcasing their hard work. The event highlighted the gifts and talents of disabled people and challenged some of the stereotypes disabled regularly face.

Our work with Glasgow University in producing a disability awareness training pack for secondary schools will hopefully have an impact in the understanding of the gifts and talents of disabled people and how, with the right support, disabled people can achieve the same goals and realise the same dreams as all members of society.

Financial review

Brief statement of the charity's policy on reserves

The Advisory Group has no reserves.

Details of any deficit

This year's deficit of £24,720 follows on from last year's surplus of £52k. This is due to the timing of grant payments and fundraising income and the payment of associated invoices crossing over the financial year end 24/25 and current financial year 25/26.

Strictly All Abilities: Income received in 24/24 = £19,538
Income received in 25/26 = £9,503

As the event was held in April 2025 the main expenditure of £28,191 is recorded in the current reporting period.

Big Lottery Grant (£40, 679) is paid annually in September.

A grant from Community Lifestyles of £10k was received at the end of the financial year 24/25 and the associated invoice for the project was paid during the financial year 25/26.

Donated facilities and services (if any)

As part of the service level agreement with Key, in return for consultation on their services and accessibility of their information, Key provides venues and support through a TAG supporter for 2.5 hours per week for each of the 15 regional groups.

KEY also provide IT support and HR service for contracting and payroll etc.

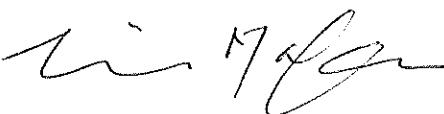
APPENDIX 1

Other optional information

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	William MacKeown	
Position (e.g. Chair)	Chairperson	
Date	01.07.26	



SC042972

The Advisory Group

Year End Accounts

2025/26

Receipts and payments accounts							
For the period from	Period start date			to	Period end date		
	Day	Month	Year		Day	Month	Year
	01	04	2025		31	03	2026

Section A Statement of receipts and payments

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total funds current period to nearest £	Total funds last period to nearest £
A1 Receipts						
Donations	3,361				3,361	
Legacies					-	
Grants		49,082			49,082	55,226
Receipts from fundraising activities	1,156	21,948			23,104	19,539
Gross trading receipts					-	-
Income from investments other than land and buildings					-	-
Rents from land & buildings					-	-
Gross receipts from other charitable activities	2,125				2,125	9,260
					-	
A1 Sub total	6,642	71,030	-	-	77,672	84,025
A2 Receipts from asset & investment sales						
Proceeds from sale of fixed assets	-	-		-	-	-
Proceeds from sale of investments	-	-	-	-	-	-
A2 Sub total	-	-	-	-	-	-
Total receipts	6,642	71,030	-	-	77,672	84,025
A3 Payments						
Expenses for fundraising activities					-	2,142
Advertising & Media					-	
Social Activities					-	
Payments relating directly to charitable activities	1,851	100,541			102,392	28,994
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Other					-	
					-	
A3 Sub total	1,851	100,541	-	-	102,392	31,136
A4 Payments relating to asset and investment movements						
Purchases of fixed assets	-				-	
Purchase of investments					-	
A4 Sub total	-	-	-	-	-	-
Total payments	1,851	100,541	-	-	102,392	31,136
Net receipts / (payments)	4,791	(29,511)	-	-	(24,720)	52,889
A5 Transfers to / (from) funds						
					-	
Surplus / (deficit) for year	4,791	(29,511)	-	-	(24,720)	52,889

Section B Statement of balances

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
B1 Cash funds	Cash and bank balances at start of year	92,980	35,437			128,417	66,289
	Surplus / (deficit) shown on receipts and payments account	4,791	(29,511)			(24,720)	52,889
	correction to O/B for FY 2023/24					-	(28)
						-	
	Cash and bank balances at end of year	97,771	5,926	-	-	103,697	119,150
(Agree balances with receipts and payments account(s))							

	Details	Fund to which asset belongs	Market valuation to nearest £	Last year to nearest £
B2 Investments				
		Total	-	-

	Details	Fund to which asset belongs	Cost (if available) to nearest £	Current value (if available) to nearest £	Last year to nearest £
B3 Other assets					
		Total	-	-	-

	Details	Fund to which liability relates	Amount due to nearest £	Last year to nearest £
B4 Liabilities				
		Total	-	-

	Details	Fund to which liability relates	Amount due (estimate) to nearest £	Last year to nearest £
B5 Contingent liabilities				
		Total	-	-

Signed by one or two trustees
on behalf of all the trustees

Signature

Print Name

Date of
approval

William MacKeown
N. McGregor

WILLIAM MACKEOWN
NATALIA MCGREGOR

1/7/26
1/7/26

The Advisory Group

SC042972

Additional analysis (1)

Analysis of receipts and payments

1 Donations

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Funds from Annan	3,361				3,361	
					-	
					-	
					-	
Total	3,361	-	-	-	3,361	-

2 Grants

	Unrestricted funds to nearest £	Restricted funds to nearest £	Total current period to nearest £	Total last period to nearest £
Big Lottery (GCX)		42,179	42,179	39,573
Glasgow Wellbeing Fund (GWF)		6,528	6,528	4,358
Wellness Fund (IFP+GWF)			-	
Music Therapy (MUST)		-	-	10,170
Tesco Fund Gardening (GARD)		375	375	1,125
Support in the right direction (REN)			-	-
Total	-	49,082	49,082	55,226

3 Gross receipts from other charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Annan					-	-
Fundraising	1,156				1,156	559
Charitable activities	2,125				2,125	213
Strictly All Ability		16,214			16,214	19,539
Amazon					-	-
Kerr Street Activities		5,734			5,734	8,386
Other					-	102
Total	3,281	21,948	-	-	25,229	28,799

4 Payments relating directly to charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Big Lottery (GCX)		43,277			43,277	17,538
Wellness Fund (IFP)					-	300
Glasgow Wellbeing Fund (GWF)		3,200			3,200	1,158
Music Therapy (MUST)		10,000			10,000	240
Tesco Fund Gardening (GARD)		1,610			1,610	116
Strictly All Ability		28,682			28,682	2,142
Support in the right direction (REN)					-	-
Kerr Street Activities		13,772			13,772	8,553
Highland TAG	148				148	514
Charitable activities	1,105				1,105	264
Other	598				598	311
Total	1,851	100,541	-	-	102,392	31,136

Additional analysis (2)**5 Breakdown of unrestricted funds**

	Unrestricted fund 1 - enter name of fund below Annan TAG + Ayrshire TAG	Unrestricted fund 2 - enter name of fund below Highland TAG + Forth Valley TAG	Unrestricted fund 3 - enter name of fund below National TAG	Unrestricted fund 4 - enter name of fund below D & G TAG	Total unrestricted funds	Total unrestricted funds last period
Receipts						
Donations	3,361				3,361	
Legacies					-	
Grants					-	
Receipts from fundraising activities			1,156		1,156	874
Gross trading receipts					-	
Income from investments other than land and buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities			2,125		2,125	
Sub total	3,361	-	3,281	-	6,642	874
Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
Sub total	-	-	-	-	-	-
Total receipts	3,361	-	3,281	-	6,642	874
Payments						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities		148	1,703		1,851	1,089
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Sub total	-	148	1,703	-	1,851	1,089
Payments relating to asset and investment movements						
Purchases of fixed assets	-				-	
Purchase of investments					-	
Sub total	-	-	-	-	-	-
Total payments	-	148	1,703	-	1,851	1,089
Net receipts / (payments)	3,361	(148)	1,578	-	4,791	(215)
Transfers to / (from) funds					-	
Surplus / (deficit) for year	3,361	(148)	1,578	-	4,791	(215)

Nature and purpose of funds

All donations held can be used as TAG sees fit to carry out the purposes set by the organisation. During the year, balances held in regional bank accounts were transferred to the main bank account following account closures. These transfers represent internal movements of funds and are not included in receipts. Breakdown is as follows: Cetral (Forth Valley) - £2981.43; D&G - £549.68; Highland - £11,139.79; Ayrshire - £949.46

The Advisory Group

SC042972

Additional analysis (3)

6 Breakdown of restricted funds

	Restricted fund 1 - enter name of fund below	Restricted fund 2 - enter name of 3 - enter name of fund below	Restricted fund 4 - enter name of fund below	Restricted fund 5 - enter name of fund below	Restricted fund 6 - enter name of fund below	Total restricted funds last period
	Stratford Ability (SAA)	Big Lottery (GCL)	Wellness Fund (JFP)	Glasgow Wellbeing Fund (GWF)	Tesco Fund Gardening (GARD)	Kerr St Activities (KS)
Receipts						
Donations						
Loans						
Grants	16,214	42,179		6,528	375	49,082
Receipts from fundraising activities						55,225
Gross trading receipts						19,539
Income from investments other than land and buildings						
Rents from land & buildings						
Gross receipts from other charitable activities						
Sub total	16,214	42,179	-	6,528	375	57,34
						71,030
						83,151
Receipts from asset & investment sales						
Proceeds from sale of fixed assets						
Proceeds from sale of investments						
Sub total						
Total receipts	16,214	42,179	-	6,528	375	57,34
						71,030
						83,151
Payments						
Expenditure for fundraising activities	28,682					28,682
Gross trading payments						
Investment management costs						
Payments relating directly to charitable activities		43,277		3,200	1,610	71,859
Grants and donations						
Governance costs:						
Audit / independent examination						
Preparation of annual accounts						
Legal costs						
Sub total	28,682	43,277	-	3,200	1,610	100,541
						30,047
Payments relating to asset and investment movements						
Purchase of fixed assets						
Purchase of investments						
Sub total						
Total payments	28,682	43,277	-	3,200	1,610	100,541
Net receipts / (payments)	(12,468)	(1,098)	-	3,328	(1,235)	(29,511)
Transfers to / (from) funds						
Surplus / (deficit) for year	(12,468)	(1,098)	-	3,328	(1,235)	(29,511)
Nature and purpose of funds						53,104

BANK INCOME

	National	Central	D+G	Far North	Ayrshire	Highland	Dunbartonshire	N/Lanark	S/Lanark	Clyde
OPENING BALANCES	116,407.75									
Donations Unrestricted	100,649.00	2,981.43	549.68	138.39	949.46	11,139.79	-	-	-	-
Donations Restricted	3,360.88									
Fundraising Unrestricted	903.99									
Fundraising Restricted	9,503.64									
Grants Unrestricted										
Grants Restricted	49,082.00									
Others	28,528.96									
FROM PETTY CASH/OTHER TAG AC										
Total Bank Income	192,028.47	2,981.43	549.68	138.39	949.46	11,139.79	-	-	-	-

CASH INCOME

	National	Central	D+G	Far North	Ayrshire	Highland	Dunbartonshire	N/Lanark	S/Lanark	Clyde
OPENING BALANCES										
Donations Unrestricted	1,733.48	976.68	10.24	-	22.16	-	-	-	-	-
Donations Restricted										
Fundraising Unrestricted	1,220.71									
Fundraising Restricted	13,600.35									
Grants Unrestricted										
Grants Restricted										
From Bank										
Total Cash Income	16,554.54	976.68	10.24	-	22.16	-	-	-	-	-

TOTAL INCOME 225,350.84

BANK EXPENDITURE

	National	Central	D+G	Far North	Ayrshire	Highland	Dunbartonshire	N/Lanark	S/Lanark	Clyde
TOTALS										
Fundraising Expenses	-									
Expense Restricted Funding	- 97,920.35									
Expense Un-Restricted Funding	- 1,201.81									
Advertising/Media	-									
Capital	-									
Charity Donations	-									
Others	-									
To Petty Cash/Other TAG acc	- 15,620.36	- 2,981.43	- 549.68		- 949.46	- 11,139.79				
Total Bank Expenditure	- 99,122.16	- 2,981.43	- 549.68		- 949.46	- 11,139.79	-	-	-	-

CASH EXPENDITURE

	National	Central	D+G	Far North	Ayrshire	Highland	Dunbartonshire	N/Lanark	S/Lanark	Clyde
TOTALS										
Fundraising Expenses	- 649.64									
Expense Restricted Funding	- 2,620.23									
Social Activities	-									
Advertising/Media	-									
Capital	-									
Charity Donations	-									
Others	-									
TO BANK	- 12,908.60									
Total Cash Expenditure	- 16,178.47	-	-	-	-	-	-	-	-	-

TOTAL EXPENDITURE - 130,920.99

CHECK POINT -NET BALANCES

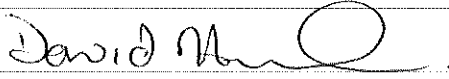
BANK	93,044.70	-	-	-	138.39	-	-	-	-	-
CASH	1,385.15	376.07	976.68	10.24	-	22.16	-	-	-	-
TOTAL	94,429.85	OK	OK	OK	OK	OK	OK	OK	OK	OK

YEAR END FIGURES 94,429.85

93,044.70
1,385.15

APPENDIX 3



		Independent examiner's report on the accounts v2						
Report to the trustees/members of		The Advisory Group						
Registered charity number		SC042972						
On the accounts of the charity for the period		Period start date				Period end date		
		Day	Month	Year		Day	Month	Year
		01	04	2025	to	31	03	2026
Respective responsibilities of 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) 2005 Act and the Charities Accounts (Scotland) Regulations 2006 (as amended). The charity trustees consider that the audit requirement of Regulation 10(1) (d) of the Accounts Regulations does not apply. It is my responsibility to examine the accounts as required under section 44(1) (c) of the Act and to state whether particular matters have come to my attention.						
Basis of independent examiner's statement		My examination is carried out in accordance with Regulation 11 of the 2006 Accounts 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 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 Accounts Regulations, and - to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts 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.						
Signed**:						Date:	22.06.26	
Name:		David Hunter						
Relevant professional qualification(s) or body (if any):		Retired Head of Finance						
Address:		3F Killermont View Glasgow G20 0TZ						