

Registered Charity No. 1161144



***In the Vale
For the Vale***

16 Market Place
Wantage
OX12 8AE

ANNUAL REPORT
2016 - 2017

Supported by



WANTAGE INDEPENDENT ADVICE CENTRE

Serving Wantage, Grove and District

Annual Report 2016-2017

*Annual General Meeting to be held
Tuesday 20th June 2017
The Beacon
7.30pm*

MANAGEMENT COMMITTEE – APRIL 2016 - MARCH 2017

Hon. Chairman	Peter Harbour	
Hon. Vice Chairman	Ann Rowe/Geoff Hamer	
Hon. Treasurer	Bill Jestico	
Hon. Secretary	Keith Robbins	
Committee Members	Spencer Clubb	Councillor St John Dickson
	Councillor Charlotte Dickson	Jenny Hannaby
	Joyce Hutchinson	Councillor Dave Parry
	David Wise	

EMPLOYEES APRIL 2016 – MARCH 2017

Joint Operations Mgr.	Pamela Roscoe
Joint Operations Mgr.	Wendy Watson
Advice Supervisor	Karen Muir
Admin Officer	Celia Cotton
Admin Officer (Transport)	Paula Moore
Community Advice Liaison Mgr.	Verity Hollingshead (1 year contract)

VOLUNTEER ADVISORS & OFFICE STAFF APRIL 2016 - MARCH 2017

Roz Boadle	Debbie Bowles	Stella Brecknell
Adrian Buck	John Caldicott	Jeanne Felmingham
David Fox	Malcolm Fretter	Peter Harbour
Jim Hetherington	Rita Hetherington	Shirley Humphreys
Anita Hutchins	Hilary Isaac	Clare Jacobs
Andrew Kerr	Sarah Matthews	Nicky Middleton
Zelda Moorwood	Lyn Morton	Gill Panton
Clare Pennicott	Kay Porter	Janet Price
Ann Rowe	Janet Smith	Jim Wells





VOLUNTEER DRIVERS APRIL 2016 - MARCH 2017

Duke Ashford
David Boyd
David Brooks
Peter Butcher
Wendy Carney
Geoff Corker
John Durban
Susan Eden
Monica Graham
Clare Jackson
David Kent
Jim Kowszun
Helen Middleton-Stewart
Adrien Porter
Tom Saunders
Maggie Swain
Graham Tucker
Joyce Ward
Peter White
Mike Willis

Colin Bayley
Ann Breen
Adrian Buck
John Caldicott
Alan Clark
Bill Cosgrave
Charlie East
Julie Garvey
David Gregory
Lyn Johnston
Andrew Kerr
Paul Longworth
Frank Parnell
Robert Rogers
Lee Shann
Eddy Todd
Angela Vernon
Ian Weeden
Mary Whittaker
David Wise

Alison Boyd
Brendan Breen
Dennis Buckland
Guy Calve
John Collie
Ernest Draper
Ron East
Dick Graham
Helen Howe-Jones
Lyn Jones
Nigel Kilbey
Caryl MacRandal
Jenny Penfold
Peter Rolfe
Rob Soames
Paul Townsend
Malcolm Vernon
Lesley Weston
John Willemsen

VOLUNTEER GOOD NEIGHBOURS APRIL 2016 - MARCH 2017

Clare Abolins
Stella Brecknell
Adrian Buck
Mike Evason
Anne Geach
Helen Middleton-Stewart
Jean Orme
Pamela Roscoe
David Wise

Helen Bailey
Ann Breen
Chris Callaghan
Maxine Eyles
Lois Greenhalgh
Fiona Miles
Claire Parry
George Spalding

Colin Bayley
Brendan Breen
Nan Draper
Angie Fisher
Mabel Kearvell
Veronica Milligan
Dave Parry
Shirley Ward

Anna Bradford
Jill Broadley
Maya Eadie
David Fox
Caryl MacRandal
Mo Nisbet
Janene Pemberton
Philip Wearing



CHAIRMAN'S REPORT

We are called Wantage Independent Advice Centre but that title does not do justice to the role that we play in the Vale of White Horse. It also does not recognise the other two areas of our service namely the Community Transport and Good Neighbour schemes. Our services already cover most of the Vale and we continue to expand our service reach.

This has been a year of further solidification. We are now well established in our extended offices and we have been able to give our clients appropriate privacy when required and the service continues to run smoothly. We still need more volunteers for all services as natural attrition and expanding demand continues as normal.

The WIAC has changed the management of its Good Neighbour scheme. Helen Bailey who was responsible for the scheme since its inception has retired and we have appointed Verity Hollingshead, on an initial fixed term contract, as our Community Advice Liaison Manager. I would like at this time to express our sincere gratitude to Helen for all the hard work and dedication to the WIAC over the past nine years. Without her commitment and drive we would not have the GNS that we have today.

Our financial situation over the year has been satisfactory and we have made a small surplus after postponing certain capital expenditure as the result of the timeline relating to our Vale of White Horse District Council grant application for core funding. With indications of backing and encouragement from the Council with regard to the new funding, the Board of Trustees permitted the Operations team to employ additional part time staff with a view to increasing our services across the board. The Management Committee and I will work closely with the Council in the coming months to ensure there is full comprehension of our ongoing and long-term requirements, to make certain the community needs we meet are recognised and be confident that our impact is truly grasped within the District Council.

Each year I express gratitude to all our volunteers for their ongoing support and once again I thank you. You are the cornerstone of the organisation and as I said last year we are nothing without you. Your continuing skill and support is without doubt our greatest asset. Our thanks must also be extended to the paid staff; their dedication, hard work and commitment is fantastic and the financial rewards do not fully acknowledge this, so this is to record the extra that all of you give. These thank yous come not only from the Management Committee but from all the people in the Vale that we have helped. The people to whom we provide essential assistance may be old, infirm or disabled, the mentally or physically ill, the homeless or disadvantaged, the sad or depressed, the lonely or confused, those that are disenfranchised by the complexities of the benefits system or all those that just need a little help in coping with the modern world. This list is not complete but it does give some idea as to how important our service is to the community.

Indirectly, this thank you from the clients extends to all our funders, large and small, your money helped to make life more tolerable for many in the Vale.

As to the future, we will continue to improve and expand our services with the help of the community that we serve. We are recruiting new members of the Management Committee with more focus on succession planning and we will concentrate much more on longer-term strategic vision for the charity. Recruiting and training volunteers will continue to be a priority to maintain our high standards.

We have in the WIAC a highly competent, valuable and respected service that enhances and improves the quality of life for many people within the Vale. I continue to be very proud of leading this great charity and I look forward to sharing with you our successes and achievements as we move forward and develop in the future.



Helen Bailey,
our Good Neighbour Scheme Manager,
at her surprise farewell gathering
on the 8th March 2017.

Helen is shown here receiving her
personalised GNS tea-pot.



Peter Harbour
Chairman

ADVICE SERVICES REPORT

1 year, 12 months, 52 weeks, 365 days, 8,760 hours.....Where did the time go? How is it possible that so much time has passed since composing last year's report?? Have I really cut my "new-girl apron strings"? However, that is the reality and as such it is time to attempt to wrap a particularly busy year into a two page summary! I had a master plan in April last year; to keep a diary of events, a note of interesting snippets so to speak and to therefore have a clear impact statement to share in the 2016/17 Annual Report. As with most resolutions that wasn't to be, so this time of reflection, albeit demanding, has been incredibly rewarding.

What does Advice Services mean? For our team here at the WIAC it is about offering impartial guidance or recommendations with regard to prudent action in a manner which is free, independent and confidential. The aim of our service is that the client is in a better position having spoken to us than before and that where possible our volunteers have been able to empower and enable the client to help himself/herself going forward. That said, does Advice Services mean the same to everybody? In all honesty.....how can it? The challenges of today's modern world impact each and every one of us differently and for an extensive breadth of reasons.

The year has really just raced by and at times our incredible volunteers must have felt that they had been caught up in a whirlwind; intricacies of scenarios, complexities of processes, incredulity of decisions and all of these also intermingled with very real human emotions. Every client, every situation truly matters to these remarkable volunteers and their commitment and determination is a sight to behold. The team would be the envy of many a Boardroom.

We have continued to strengthen our relationships with other organisations by for example, bolstering our mutual referral programme by working even more closely with Mind, Age UK, Pension Wise and Connection Support. We have also undertaken shared training opportunities with Citizens Advice on topics such as Housing and Disability Benefits.

During the last 12 months, with the marked benefit of having Karen Muir in place as our established Advice Supervisor, the WIAC has been able to attend conferences, seminars, talks and Partnership type meetings as a participant, exhibitor and presenter. The value of these sessions from a networking, knowledge and increased awareness perspective alone is immense. Furthermore, four of our advisors also worked with Citizens Advice to deliver Will, Power of Attorney and scams training at local Day Centres.

The WIAC is also delighted to be able to share that, since the start of the calendar year, it has launched a fortnightly advice session in Faringdon at the Pump House.

This year we have welcomed five new faces into the Advice team (30); this team supports all of our pre-booked and drop-in appointments. This is a much desired and needed increase, though it is fair to say that successfully coordinating and delivering the training was no small undertaking for Karen. So much so, that we have further evaluated our training programme which should stand us in good stead for what I hope is another set of new trainees throughout 2017/18. It is with sadness though that we have also had to say goodbye to a couple of valued individuals and since January one or two of the team have needed to scale back their involvement.

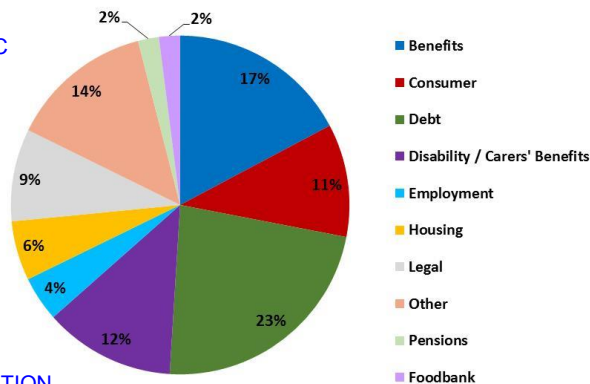
Recruitment remains a core focus and we are hoping to ramp up our campaign in the coming months starting with innovative local Parish newsletter content as well as a targeted joint operation with Faringdon Town Council to help with enhanced support for the communities in Faringdon and its surrounding Vale villages.

The WIAC continues to work closely with the advisors on ensuring the quality and consistency of our Advice Service. Our regular internal audits afford the opportunity to review our procedures and improve our approach in this constantly evolving environment whilst also offering the chance to recognise and praise the significant effort and first-rate results provided by this volunteer group. The tremendous quarterly client feedback survey results reinforce this understanding whilst also keep us all grounded in terms of needs, challenges and consequences.

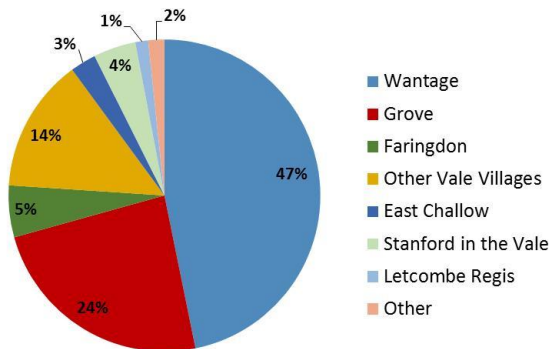
Below are a few headlines in terms of Advice statistics to provide context with regard to our activity figures. As always, numbers alone can be misleading or at best open to interpretation. Only by understanding the complex layers of reality underneath the statistics is it possible to grasp the full tale as it unfolds. Hopefully the written content of this report will assist with the comprehension of the true picture.

We owe extreme gratitude to our team of Advice volunteers. Without these volunteers there is no key-stone to our service and our whole community is all the richer for the time and energies of these individuals.

ADVICE BY TOPIC



ADVICE BY LOCATION



QUICK STATS

Advice Consultations 4,170

Enquiries 64%

Cases 36%

Pamela Roscoe
Joint Operations Manager

GOOD NEIGHBOUR SCHEME (GNS) REPORT

Another year on for our Good Neighbour service and it continues to be an absolute privilege to personally be involved with this scheme as both a volunteer and one of the charity's Operations Managers. However, it is as this financial year closes that we have to refocus and energise ourselves to manage without Helen Bailey at our helm. Helen, a volunteer, was instrumental in the creation and guidance of our GNS from its inception and through several, early evolutions. The Operations team, our clients and the volunteers will not only miss her stewardship and counsel but her compassion and drive. Thankfully many friendships were made that will endure without the scheme as the connection. The WIAC was incredibly fortunate that Helen allowed us plenty of time and patience to plan and prepare for the next phase of our Good Neighbour journey and as such, with the support of the Trustees, we have been able to recruit an additional part-time member of staff into the organisation, on a 12-month contract, the newly created role of Community Advice Liaison Manager (CALM).

We welcomed Verity Hollingshead into this contract role in early December and began the training programme in earnest after Christmas. Much of this role is about people, relationships and the tangled web that binds us to each other and our own situations. Nonetheless, it also requires gaining the extensive, broad knowledge necessary and that takes time and comes with experience. The rest of the Operations team, the advisors and the GNS volunteers have all warmly received this new role and provide ample encouragement and support to our CALM.

In 2015/16 we reported a rising trend in need and this has persisted over the last 12 months. The GNS has recorded 108 new referrals during 2016/17, demonstrating a 17% increase year to year. In line with this referral growth, the number of face to face assessments conducted by the scheme management and coordination team has seen a similar amplification pattern, with 75 home visits taking place. We have also worked diligently on referral initiatives this year to help raise further awareness of the Good Neighbour service by linking more successfully with Thames Valley Police (particularly its VERA offering) as well as local GP surgeries and Housing Association complexes for the over 55s. It is our intention to further extend the reach of this referral matrix in the coming months to encompass more health and welfare agencies.

The nature of our client interactions remains complicated and we certainly lean on the WIAC organisation as a whole to intertwine our service offerings together to offer an appropriate path as a single way forward. We have found ourselves on numerous occasions this year engaging with and working alongside the statutory agencies, for example Social Services for several different Safeguarding scenarios.

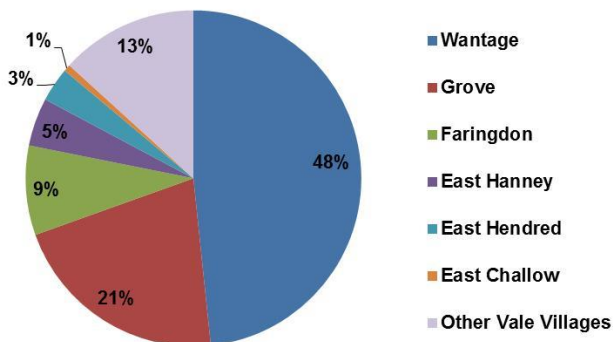
We now stand at over 30 in terms of our volunteer numbers which is remarkable. This increase has been heavily assisted by our foray into social media advertising and we are pilot members of Oxford Computer Consultants' AML project that has delivered over 25 fresh "expressions of interest" for new GNS volunteers since January. The impact and our achievements seen over the past year would not have been accomplished without the caring and generous nature of all these volunteers. They are a fantastic group of people often working in isolation with vulnerable individuals in woeful or difficult circumstances and I am sincerely grateful for their time, effort and contribution.

Our regular gatherings with the volunteers have been maintained although the occurrence has been a little less ordered in its rhythm of late! These sessions continue to provide vital feedback from our “feet on the street” about the clients, the clients’ challenges or worries and into next year we hope to also be able to incorporate additional proactive volunteer training and support in both the sessions and within the field.

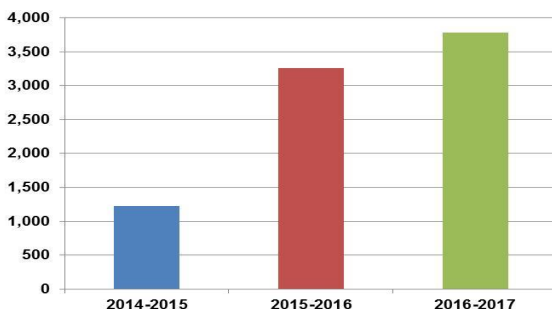
We continue to attend quarterly meetings in Oxford with Volunteer Link-up, we remain closely associated with Age UK and its Community Information Network, we are now active members of Neighbourhood Action Groups and for the first time we not only attended the annual Carers’ Conference but actually had an exhibition stand in the main hall. Our community connections have also extended since the autumn enabling us to participate at the Rural Oxfordshire Network event and offer a presence at a number of seminars and forums.

Through the volunteer team, the scheme now supports **59** clients on a regular basis with approximately **1,250** client visits undertaken during 2016/17. Across all of the elements of the GNS scheme there have been **3,780** hours documented with a total of **152** different clients receiving support.

CLIENT LOCATIONS



HOURS OF SUPPORT



Thank you again to the whole team for their involvement, input and commitment. It will be fascinating to see what the next 12 months has in store for us all within this Good Neighbour sphere. I am certain one way or another it will be hectic yet worthwhile.

Pamela Roscoe

Good Neighbour Scheme Co-ordinator / Joint Operations Manager

TRANSPORT REPORT

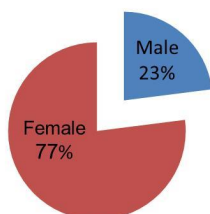
In April 2016 we entered into a two year project with Oxfordshire County Council (OCC), to expand our Wantage Day Centre transport. The aim of this project is for the WIAC to provide transport for a number of Wantage Day Centre clients who previously travelled by OCC special buses. This project was brought about to enable OCC to yield a reduction in their transport budget. One of our targets was to *'Recruit and retain an additional 18 volunteer drivers (10 in the first year and 8 in the second year)'*. Since April 2016 I have interviewed 17 potential volunteer drivers. Two didn't complete the process; two did come on board but have since stopped driving due to family circumstances, ultimately resulting in 13 new active drivers. This leaves the team to recruit five new drivers over the coming year to meet our target. We now have a database of 58 volunteer drivers. We are currently doing 36 Wantage Day Centre trips a week.

Our transport requests have increased over this last year. Some of this is due to the Wantage Day Centre project, but the cutting of the bus routes by the County Council has had an effect as well. Our scheme used to receive about 75 to 85 transport requests a week but the average weekly number is now in the region of 105. The requests for transport to attend the Grove Day Centre have also risen this year. The October Club in Wantage is another group which has started to use our transport scheme, along with Root & Branch based in Watchfield.

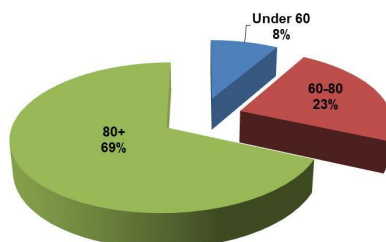
We were hoping by now to have had our new invoicing model added to our tailored computer software, IAC Online, but, because the migration to a different Microsoft platform has taken longer than anticipated, this has not yet happened. When this invoicing model is added to our software it should make the process much quicker and more efficient. The reason that we invoice all our Day Centre clients, even though it takes us longer, is because it enables us to keep the fares very low. If a driver can get two or three clients into one Day Centre run then the cost to each client is reduced. For example, depending on where a client lives, and the sharing of a volunteer's car, a daily Day Centre fare for a passenger can be as low as £2.00.

Our fares have needed to be reviewed for some time. Actually the last time we reviewed them was 2011. Not all of the fares have increased, many of the fares have remained the same eg our local, standard minimum (return) fare is still £5.00 and the average (return) Oxford hospital trip is still £22.00. The drivers had been reporting back to the transport team that some fares didn't seem to be covering their reimbursement, at 40p per mile. While conducting this review exercise, the WIAC has taken the opportunity to calculate the fares for a number of other hospitals. We have seen an increase in the requests for transport to the Royal Berks, Great Western and Ridgeway hospitals. We've included the new standard fares at the end of this Transport report, other destinations and pick-up locations would be available upon request.

CLIENTS BY GENDER



CLIENTS BY AGE

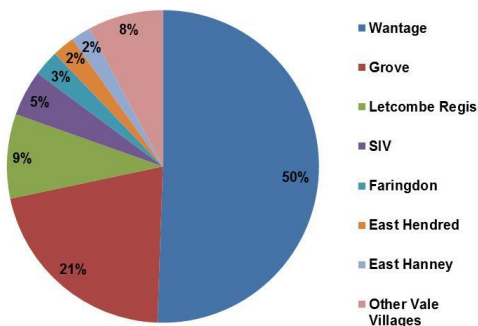


This year we have had over 500 extra transport requests. Drives are cancelled sometimes due to the client not being well enough to travel or by the hospital/doctor. This cancellation can sometimes be very last minute.

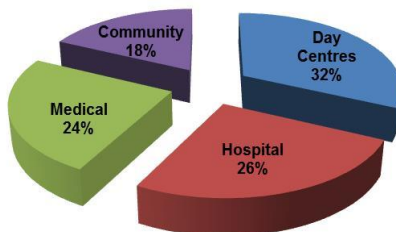
With our increase in volunteer drivers we have managed to cut our “No Booking” requests by over half. Some of the “No Booking” requests are from clients who have been given a last minute appointment asking for transport for that day or the day after. We continue to strive to bring this figure down even further, but due to the nature of the destinations and people we drive, it will never be zero.



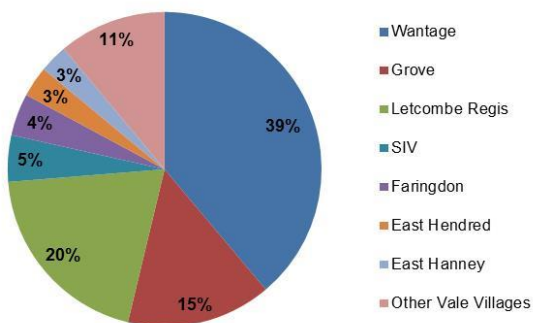
BOOKINGS BY LOCATION



PEOPLE BY DESTINATION



MILES BY LOCATION



As always my thanks go to the Transport Admin Team and the drivers who all work very hard and incredibly well together to deliver this essential, first class service.

Wendy Watson
Joint Operations Manager

Wantage Independent Advice Centre, Community Transport Scheme
Volunteer drivers in their own cars transporting elderly & infirm people to various destinations.

These are all return fares, from where the client lives.		Wantage	Oxford	Abingdon	Witney	Royal Berks	Great Western	Horton	Ridgeway
			Hospital	Hospital	Hospital	Hospital	Hospital	Hospital	Hospital
Wantage	£ 5.00	£ 22.00	£ 13.00	£ 18.00	£ 35.00	£ 20.00	£ 40.00	£ 25.00	
Grove	£ 5.00	£ 22.00	£ 13.00	£ 18.00	£ 35.00	£ 20.00	£ 40.00	£ 25.00	
Ardington	£ 6.50	£ 24.00	£ 13.00	£ 21.00	£ 30.00	£ 21.00	£ 44.00	£ 26.00	
Charney Bassett	£ 13.00	£ 24.00	£ 15.00	£ 19.00	£ 46.00	£ 25.00	£ 43.00	£ 29.00	
Childrey	£ 8.50	£ 26.00	£ 15.00	£ 21.00	£ 35.00	£ 20.00	£ 44.00	£ 20.00	
Chilton	£ 18.00	£ 29.00	£ 18.00	£ 30.00	£ 37.00	£ 40.00	£ 49.00	£ 45.00	
Denchworth	£ 9.00	£ 24.00	£ 14.00	£ 19.00	£ 40.00	£ 24.00	£ 43.00	£ 28.00	
Didcot	£ 22.00								
East Challow	£ 5.00	£ 23.00	£ 14.00	£ 17.00	£ 34.00	£ 20.00	£ 41.00	£ 20.00	
East Hanney	£ 9.00	£ 22.00	£ 13.00	£ 20.00	£ 38.00	£ 23.00	£ 38.00	£ 27.00	
East Hendred	£ 10.00	£ 25.00	£ 13.00	£ 24.00	£ 33.00	£ 27.00	£ 43.00	£ 36.00	
Faringdon	£ 19.00	£ 32.00	£ 25.00	£ 21.00	£ 55.00	£ 21.00	£ 49.00	£ 25.00	
Goosey	£ 10.00	£ 26.00	£ 19.00	£ 21.00	£ 39.00	£ 20.00	£ 43.00	£ 26.00	
Kingston Lisle	£ 11.50	£ 30.00	£ 16.00	£ 22.00	£ 42.00	£ 17.00	£ 48.00	£ 19.00	
Letcombe Bassett	£ 10.00	£ 28.00	£ 18.00	£ 24.00	£ 42.00	£ 19.00	£ 47.00	£ 25.00	
Letcombe Regis	£ 7.50	£ 26.00	£ 15.00	£ 22.00	£ 38.00	£ 18.00	£ 44.00	£ 26.00	
Lockinge	£ 7.00	£ 23.00	£ 14.00	£ 22.00	£ 33.00	£ 27.00	£ 45.00	£ 30.00	
Sparsholt	£ 10.00	£ 29.00	£ 18.00	£ 23.00	£ 36.00	£ 18.00	£ 47.00	£ 20.00	
Stanford I V	£ 13.50	£ 27.00	£ 19.00	£ 20.00	£ 50.00	£ 22.00	£ 45.00	£ 26.00	
Uffington	£ 16.00	£ 32.00	£ 22.00	£ 24.00	£ 45.00	£ 21.00	£ 50.00	£ 24.00	
West Challow	£ 6.00	£ 25.00	£ 16.00	£ 19.00	£ 36.00	£ 18.00	£ 44.00	£ 21.00	
West Hanney	£ 10.00	£ 23.00	£ 14.00	£ 18.00	£ 40.00	£ 25.00	£ 41.00	£ 28.00	
West Hendred	£ 8.50	£ 23.00	£ 14.00	£ 25.00	£ 36.00	£ 24.00	£ 45.00	£ 36.00	

A return trip to **Wallingford** Hospital is £20.00
A return trip from Wantage to **Didcot** is £12.00

A return trip to the **Peachcroft Dentist** is £17.00
For a very small number of clients there are some bespoke fares.

If a **Faringdon driver** is taking a **Faringdon client** to any of the hospitals or into Wantage you can reduce the charge by £7.00. I.E. Faringdon into Wantage and back to Faringdon will be a return fare of £12.00 & From Faringdon into an Oxford hospital and back to Faringdon will be a return fare of £25.00.

BIG THANK YOU

Wantage Independent Advice Centre is very grateful to the many individuals, councils and groups who support us as without this support the Centre would not be able to continue to help an ever increasing number of clients.

So it is a **BIG** thank you to our Grant Providers:

- Vale of White Horse District Council
- Oxfordshire County Council
- Wantage Town Council
- Grove Parish Council
- Faringdon Town Council
- Sovereign Housing Association

We are also indebted to the following parish councils for their grants:

- | | | |
|------------------------|-------------------|------------------------|
| • Ardington & Lockinge | • Charney Bassett | • Childrey |
| • East Challow | • East Hanney | • East Hendred |
| • Letcombe Regis | • Sparsholt | • Stanford in the Vale |
| • Uffington | • Watchfield | • West Hendred |

Thank you to the following people/organisations that have raised money for us in a variety of ways:

- | | |
|-----------------------------------|--------------------------------|
| • Childrey Methodist Church | • Nationwide (Community Match) |
| • Shell International | • St John Vianney |
| • Wantage Garden Association | • Wantage Rotary Club |
| • Wantage Methodist Church | • Wantage Ex-Tablers/41 Club |
| • Ed Vaizey ("Speakers' circuit") | • Madhatters Ceilidh Band |

We would also like to thank those organisations and individuals who generously donate practical support and assistance throughout the year:

- Chapman Worth Ltd, Chartered Accountants
- Local solicitors Elianne Edgington, Sandy Millikin, Tina Friend, Scott Robinson and volunteer paralegal Jean Nunn-Price for providing legal consultations
- Howard Hill of First Ideas for design & hosting of the WIAC website and email provision
- Motion Printing for designing the WIAC printed material

It is partly as the result of the generous individual donations from members of the public that we have been able to achieve the printing of this Annual Report.

So it is a **BIG** thank you from all of us and we hope that you will be able to continue to support us in the future.

Keith Robbins

Hon. Secretary, WIAC Management Committee

**WANTAGE INDEPENDENT ADVICE CENTRE
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2017**

WANTAGE INDEPENDENT ADVICE CENTRE

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Mr WR Jestico Mrs J T Hannaby Mrs A Rowe Mr K Robbins Mr G Hamer Mr S Dickson Mr S Clubb Mrs J Hutchinson Mr P Harbour (chairman) Mr D Parry Mrs C Dickson Mr D Wise
Charity number	1161144
Principal address	16 Market Place Wantage Oxfordshire OX12 8AE
Independent examiner	Chapman Worth Limited 6 Newbury Street Wantage Oxfordshire OX12 8BS

WANTAGE INDEPENDENT ADVICE CENTRE

TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2017

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

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the Wantage Independent Advice Centre Governance and Management Policies Manual, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)".

Objectives and activities

Mission Statement

Wantage Independent Advice Centre works at the heart of the local community and is dedicated to serving those in need of Advice, Transport or Good Neighbour services. Consideration for volunteer and client welfare is the foundation of everything we do. We strive to be the best notwithstanding limitations of budget, space and other resources.

Object

The object of the CIO is the relief of those in need, for any reason including but not limited to ill health, disability, financial hardship, social exclusion or other disadvantage.

The object will be met by the provision of services as set out below for the benefit of residents who live in the Vale of White Horse District Council.

1. An advice and information service
2. A transport service
3. A Good Neighbour service
4. Other services, provided from time to time, which are deemed appropriate and in accordance with the stated charitable objective

During the year, Wantage Independent Advice Centre has carried out its public benefit duty and its duty with regard to the objectives of the charity. The trustees have paid due regard to guidance issued by the Charity Commission in deciding what activities the charity should undertake.

Achievements and performance

PLAN 2016 – 2017

- Maintain the provision of free advice services, the volunteer transport and good neighbour schemes.
- Build on our enhanced outreach advice service to Faringdon.
- Continue with the recruitment campaign for more volunteers in all areas.
- Work with Faringdon Council to explore a recruitment campaign to obtain local Faringdon volunteers over all three services.
- Carry out a quarterly client satisfaction survey. Results to be submitted to the Vale of White Horse District Council via SLA target reporting.
- Establish reporting systems to meet the SLA commitments with Sovereign Housing and OCC Transport.
- Attend annual meeting with grants officer, review targets and performance to targets.
- Continue to develop IACOnline for all services to manage future growth.
- Manage finances within budget and in accordance with the reserves policy.
- Maintain close contact with elected Councillors to ensure that the Advice Centre has a high profile.
- Support and train staff and volunteers to foster continuous service improvement.

WANTAGE INDEPENDENT ADVICE CENTRE

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

- Hold an Annual General Meeting in accordance with the Constitution.
- Maintain a safe working environment.
- Keep paid staffing levels under review.
-

Achievements 2016 - 2017

- We have maintained the provision of free advice services, the volunteer transport and good neighbour schemes.
- We have commenced a fortnightly advice service in the Pump House in Faringdon.
- We have recruited 13 volunteer drivers, 5 volunteer advisors & 8 volunteer good neighbours.
- Meetings have been arranged to work with Faringdon Town Council to launch a Faringdon recruitment campaign.
- The client satisfaction surveys have taken place and been collated. The results will be submitted at our next funding meeting. The results have been utilised and used for training and volunteer feedback.
- Reporting systems, Sovereign & OCC Transport project, have been set up and are working well.
- We met with the Communication & Grants Manager and Councillor Ware to review performance and targets.
- Our trustee Councillors are attending WIAC Management Committee meetings and feeding back to their relevant Councils. We have attended a series of Town and Parish meetings to talk about the WIAC.
- Training and one to one interviews have taken place throughout the year.
- WIAC AGM was held 28th June 2016.

Plans for the future:

- To increase the number of Trustees.
- Migration of Silverlight software for IACOnline.
- Develop the invoicing of transport clients within IACOnline software.

Financial review

At the end of the year the charity had achieved a level of reserves of £99,421 (2016: £93,896) which includes designated reserves of £3,000 (2016: £2,000). The management aims to set aside an unrestricted reserve sufficient to cover at least 12 months running costs.

The Charity's funds come largely from government and performance related grants however donations are also received.

Structure, Governance and Management

The charity is an unincorporated charity registered with the Charities Commission for England and Wales. The charity was established by a charitable trust deed on 1st April 2015. The Wantage Independent Advice Centre commenced trading on the 1 January 2016.

Trustees: Serving during the year.

Hon. Chairman	Peter Harbour
Hon. Vice Chairman	Ann Rowe/Geoff Hamer
Hon. Treasurer	Bill Jestico
Hon. Secretary	Keith Robbins
Charlotte Dickson	Spencer Clubb
Jenny Hannaby	David Parry
St John Dickson	David Wise
Joyce Hutchinson	

All new committee members, either elected at the AGM or co-opted during the year, shall complete an induction process as listed below. The induction will be conducted by the Chairman or other officers or, where appropriate, by Operations Management.

WANTAGE INDEPENDENT ADVICE CENTRE

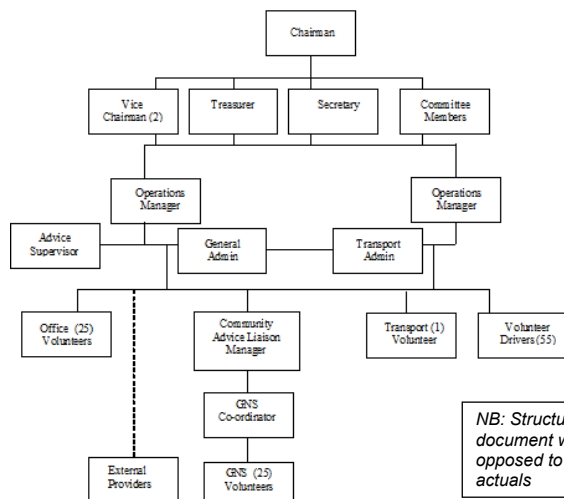
TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

- Completion of personnel file including contact details, DBS, signed confidentiality agreement
- Overview of the WIAC, its history and current activities and objectives
- Overview of WIAC finances including principal funders, annual budget and anticipated capital projects
- Introduction to Officers, Committee Members and Operations Management
- Review of key roles and responsibilities
- Review of WIAC policy documents
- Completion of the Register of Members Interests

New members will be given the following documents on joining:

- Copy of the Constitution
- Copy of the most recent Annual Report
- Minutes of Committee meetings for the previous 12 months
- Calendar of Committee meeting dates for the current year



NB: Structure taken from WIAC plan document written in April 2016 as opposed to reflecting March 2017 actuals

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

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

On behalf of the board of trustees

Peter Harbour, Chairman

Dated: 18 MAY 2017

WANTAGE INDEPENDENT ADVICE CENTRE

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF WANTAGE INDEPENDENT ADVICE CENTRE

I report on the accounts of the charity for the year ended 31 March 2017, which are set out on pages 6 to 15.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's 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.

It is my responsibility to:

- (i) examine the accounts under section 145 of the 2011 Act;
- (ii) 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
- (iii) to state whether particular matters have come to my attention.

Basis of independent examiner's report

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 next statement.

Independent examiner's statement

In connection with my examination, no other matter except that referred to in the previous paragraph has come to my attention:

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
 - (i) to keep accounting records in accordance with section 130 of the 2011 Act; and
 - (ii) to prepare accounts which accord with the accounting records, and comply with the accounting requirements of the 2011 Act;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



Chapman Worth Limited

A Chapman FCA
6 Newbury Street
Wantage
Oxfordshire
OX12 8BS

Dated: 

WANTAGE INDEPENDENT ADVICE CENTRE

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2017

	Notes	Unrestricted funds general £	Unrestricted funds designated £	Total 2017 £	Total 2016 as restated £
Income from:					
Donations and legacies	3	95,655	-	95,655	120,035
Charitable activities	4	63,068	-	63,068	8,660
Investments	5	418	-	418	113
Total income		159,141	-	159,141	128,808
Expenditure on:					
Raising funds	6	1,136	-	1,136	470
Charitable activities	7	152,308	-	152,308	34,442
Total resources expended		153,444	-	153,444	34,912
Net incoming resources before transfers		5,697	-	5,697	93,896
Gross transfers between funds		(1,000)	1,000	-	-
Net income for the year/ Net movement in funds		4,697	1,000	5,697	93,896
Fund balances at 1 April 2016 as restated		91,896	2,000	93,896	-
Fund balances at 31 March 2017		96,593	3,000	99,593	93,896

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

WANTAGE INDEPENDENT ADVICE CENTRE

STATEMENT OF FINANCIAL POSITION

AS AT 31 MARCH 2017

	Notes	2017 £	2016 as restated £
Current assets			
Cash at bank and in hand		112,953	113,026
Creditors: amounts falling due within one year	11	(13,360)	(19,130)
Net current assets		<u>99,593</u>	<u>93,896</u>
Income funds			
<u>Unrestricted funds - general</u>			
Designated funds	12	3,000	2,000
General unrestricted funds		<u>96,593</u>	<u>91,896</u>
		<u>99,593</u>	<u>93,896</u>
		<u>99,593</u>	<u>93,896</u>

The accounts were approved by the Trustees on 9 May 2017

William R. Jestico
Mr W R Jestico
Trustee

Peter Harbour
Mr P Harbour (chairman)
Trustee

WANTAGE INDEPENDENT ADVICE CENTRE

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 MARCH 2017

	Notes	2017 £	£	2016 £	£
Cash flows from operating activities					
Cash (absorbed by)/generated from operations	15		(491)		112,913
Investing activities					
Interest received		418		113	
Net cash generated from investing activities			418		113
Net cash used in financing activities			-		-
Net (decrease)/increase in cash and cash equivalents			(73)		113,026
Cash and cash equivalents at beginning of year			113,026		-
Cash and cash equivalents at end of year			112,953		113,026

WANTAGE INDEPENDENT ADVICE CENTRE

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2017

1 Accounting policies

Charity information

Wantage Independent Advice Centre is a charity registered with the Charities Commission in England and Wales.

1.1 Accounting convention

These accounts have been prepared in accordance with FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102"), "Accounting and Reporting by Charities" the Statement of Recommended Practice for charities applying FRS 102, the Charities Act 2011 and UK Generally Accepted Accounting Practice as it applies from 1 January 2015. The charity is a Public Benefit Entity as defined by FRS 102.

The accounts have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a true and fair view. This departure has involved following the Statement of Recommended Practice for charities applying FRS 102 rather than the version of the Statement of Recommended Practice which is referred to in the Regulations but which has since been withdrawn.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The accounts have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

These accounts for the year ended 31 March 2017 are the first accounts of Wantage Independent Advice Centre prepared in accordance with FRS 102, The Financial Reporting Standard applicable in the UK and Republic of Ireland. The date of transition to FRS 102 was 1 January 2016. The reported financial position and financial performance for the previous period are not affected by the transition to FRS 102.

The accounts (financial statements) have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice effective from 1 April 2005 which has since been withdrawn.

WANTAGE INDEPENDENT ADVICE CENTRE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

1.2 Prior period adjustment

A prior year adjustment has been made to 2016 to reallocate the provision for computer equipment totalling £2,000 from other debtors to a separate designated fund as these funds had been elected by trustees to be held for a specific purpose.

1.3 Going concern

At the time of approving the accounts, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees' continue to adopt the going concern basis of accounting in preparing the accounts.

1.4 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

Designated funds are reserves set aside by the trustees for a particular project.

1.5 Incoming resources

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

1.6 Resources expended

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Charitable activities include expenditure associated with meeting the charitable objectives.

Support costs are those functions that assist the work of the charity but do not directly undertake charitable activities.

Governance cost include those incurred in the governance of the charity and its assets and are primarily associated with constitutional and statutory requirements.

1.7 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

WANTAGE INDEPENDENT ADVICE CENTRE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future receipts discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

1.8 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

2 Critical accounting estimates and judgements

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

WANTAGE INDEPENDENT ADVICE CENTRE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

3 Donations and legacies

	2017	2016
	£	£
Donations and gifts	7,830	120,035
Government grants	87,825	-
	<u>95,655</u>	<u>120,035</u>
Grants receivable for core activities		
Vale of White Horse District Council	57,825	-
Oxfordshire County Council	16,000	-
Wantage Town Council	9,500	-
Faringdon Town Council	1,500	-
Grove Parish Council	3,000	-
	<u>87,825</u>	<u>-</u>

4 Charitable activities

	2017	2016
	£	£
Transport reimbursements	39,938	8,660
Performance related grants	23,130	-
	<u>63,068</u>	<u>8,660</u>

5 Investments

	2017	2016
	£	£
Interest receivable	<u>418</u>	<u>113</u>

6 Raising funds

	2017	2016
	£	£
<u>Fundraising and publicity</u>		
Advertising	<u>1,136</u>	<u>470</u>
	<u>1,136</u>	<u>470</u>
For the year ended 31 March 2016		
Fundraising and publicity		<u>470</u>

WANTAGE INDEPENDENT ADVICE CENTRE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

7 Charitable activities

	2017 £	2016 £
Staff costs	70,797	18,160
Good neighbour expenses	2,036	477
Staff expenses	3,663	1,539
Driver reimbursements	30,479	6,401
Other charitable expenditure	3,806	115
	<u>110,781</u>	<u>26,692</u>
Share of support costs (see note 8)	41,107	7,750
Share of governance costs (see note 8)	420	-
	<u>152,308</u>	<u>34,442</u>
Analysis by fund		
Unrestricted funds - general	<u>152,308</u>	
	<u>152,308</u>	
For the year ended 31 March 2016		
Unrestricted funds - general		<u>34,442</u>
		<u>34,442</u>

8 Support costs

	Support costs £	Governance costs £	2017 £	2016 £	Basis of allocation
Rent	18,000	-	18,000	4,500	100% support costs
Utilities	4,979	-	4,979	790	100% support costs
IT support/upgrade	6,510	-	6,510	287	100% support costs
Maintenance and repairs	1,985	-	1,985	413	100% support costs
Photocopier	1,187	-	1,187	165	100% support costs
Cleaner	2,480	-	2,480	446	100% support costs
Bank charges	699	-	699	128	100% support costs
Subscriptions	1,595	-	1,595	860	100% support costs
Printing and stationery	2,134	-	2,134	161	100% support costs
Insurance	1,538	-	1,538	-	100% support costs
Independent examiners fee	-	420	420	-	Governance
	<u>41,107</u>	<u>420</u>	<u>41,527</u>	<u>7,750</u>	
Analysed between					
Charitable activities	<u>41,107</u>	<u>420</u>	<u>41,527</u>	<u>7,750</u>	

Governance costs includes payments to the accountants of £420 (2016 - nil) for independent examination fees.

WANTAGE INDEPENDENT ADVICE CENTRE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

9 Trustees

None of the trustees (or any persons connected with them) received any remuneration, expenses reimbursed or benefits from the charity during the year.

10 Employees

Number of employees

The average monthly number of employees during the year was:

	2017 Number	2016 Number
	5	6

Employment costs

	2017 £	2016 £
--	-----------	-----------

Wages and salaries

	70,797	18,160
--	--------	--------

11 Creditors: amounts falling due within one year

	2017 £	2016 as restated £
--	-----------	--------------------------

Other creditors

	13,360	19,130
--	--------	--------

12 Designated funds

The income funds of the charity include the following designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes:

	Balance at 1 April 2016 £	Movement in funds			Balance at 31 March 2017 £
		Incoming resources £	Resources expended £	Transfers £	
Provision for replacement assets	2,000	-	-	1,000	3,000
	2,000	-	-	1,000	3,000

13 Analysis of net assets between funds

	Unrestricted funds £	Designated funds £	Total £
Fund balances at 31 March 2017 are represented by:			
Current assets/(liabilities)	96,593	3,000	99,593
	96,593	3,000	99,593

WANTAGE INDEPENDENT ADVICE CENTRE

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2017

14 Related party transactions

There were no disclosable related party transactions during the year (2016- none).

15 Cash generated from operations	2017 £	2016 £
Surplus for the year	5,697	93,896
Adjustments for:		
Investment income recognised in profit or loss	(418)	(113)
Movements in working capital:		
(Decrease)/increase in creditors	(5,770)	19,130
Cash (absorbed by)/generated from operations	(491)	112,913

NB: Please note the WIAC began operating as Wantage Independent Advice Centre with registered charity number 1161144 in January 2016 when it became a Charitable Incorporated Organisation. Prior to this date, for many years, the charity had operated as the Independent Advice Centre and as such the 2016 data appropriately only refers to the January to March 2016 time period.



In The Vale For The Vale

Could you be a WIAC volunteer and join our very **Happy & Helpful** team?

Across all three of our services our volunteers (present number just over 100) are supported & looked after by our paid managers

Please see below a breakdown of the different roles and the variation in commitment time expected

Volunteer Driver:

- Commitment completely decided by volunteer, even one hour a week would be beneficial
- Drivers in their own car
- We will obtain a DBS check for the volunteer
- Drivers can stipulate where they will drive local or Oxford
- Notification of required transport given a week in advance
- Drivers will receive reimbursement for their fuel costs at 40p per mile.

Good Neighbour Volunteer:

- Very flexible commitment, one hour a week or fortnight would be average
- Own transport is an advantage but not essential
- We will obtain a DBS check for the volunteer
- Visiting clients in their own home for a chat or going for a coffee with them in town
- Helping a client with paperwork or a small DIY job
- Full support from managers and regular meetings with other volunteers for extra support
- All travel expenses are reimbursed

Volunteer Advisor:

- A session is either 9.30 – 12.30 or 12.30 – 16:00
- Two sessions a week are required or one whole day
- We need generalist advisors and also advisors who will eventually go on to specialise in Debt and benefits advice
- Advisors are asked to attend the majority of between four to eight daytime meetings (maximum 2 hours) throughout the year, depending on if you are a generalist or specialist advisor
- Full training will be given, mostly in house but some could be external
- No DBS check is required for this role

Covering all three services:

- Public Liability Insurance
- You will be asked to sign a confidentiality declaration
- You can become a voting member of WIAC
- Most of all you will be helping people within your own community

For more information please contact Wendy or Pamela:



In the Vale
For the Vale
empowering people!

Funded by:

Vale of White Horse District Council
Wantage Town Council
Faringdon Town Council
Grove Parish Council
Oxfordshire County Council
Sovereign Housing Association
and other Parish Councils



unsung heroes



**The Queen's Award for
Voluntary Service 2008**

