

The



Inclusion

Group

The Inclusion Group

Annual Report

2023

Company Number: SC169412

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Chair's Report

Thank you for taking the time to read our report and accounts for the year ending 31 March 2023.

In the aftermath of the Covid 19 pandemic we have continued to increase our level of activity, and provide a good quality support service to our supported people and families. Our commissioners and an inspection in 2023 have reinforced this view.

Taking direction from our strategic objectives, the Board developed and approved an interim management structure in May 2023, recognising the need to strengthen our leadership and management structure to take us forward in the future.

Changes to Management

In July this year we welcomed our new Executive Director, Louise Craig to the Inclusion Group. Louise brings a wealth of knowledge and experience at executive level to the organisation in the field of supporting people and inclusion. Her management team consists of our Service Managers, Shift Leaders and Key Workers.

The Board is delighted to see the progress Louise and her team has made over the past six months. They have made a concerted effort to ensure that our service users continue to receive a high standard of support and care. Improved communication, as well as a systematic review of performance and procedures has improved staff morale and encouraged the development of a positive, open and transparent culture where staff feel valued. Positive feedback has been received following an all staff meeting for our support practitioners in October, and similar engagement with carers has also received excellent response. The Board and the Management Team firmly believe that regular, open and honest communication with our stakeholders is essential, if we wish to enhance our sense of community, which has always been at the heart of the Inclusion Group ethos.

Funding

Contracts have been secured for 2023/24 from the Dundee City Council Health and Social Care Partnership and Dundee City Council Children's Services. We would like to thank them for their ongoing financial support, as well as other individual's who continue to commission our services.

Going forward from 2023

You will find our Strategic Objectives within the Annual Report, which I encourage you to read. This gives a clear picture of our direction of travel and what we wish to achieve over the next 3 years. The Board is confident with the hard work and dedication of Louise and her team, our support practitioners, and the ongoing support of our stakeholders we will meet our future objectives.

On behalf of the Board I would like to thank our Management Team, and Support Practitioners who continue to enhance the lives of our service users with their care and support, and family carers and service users for their understanding with occasional unexpected changes to their service due to staffing issues. It is a pleasure and a privilege to support you in 'achieving your goals to enjoy life'. (Quote from Inclusion Group Vision Statement)

Gionne Lyce, Chair

Our Board



Yvonne Ryce (Chair of Inclusion Group and Chair Training and Development)



I became a Trustee of the Inclusion Group in 2015, and have been Chair since December 2021. I worked as a Business Education/Support for Learning Teacher until I retired. I was a carer of an Inclusion Group service user until her recent death. Throughout the years, I saw first-hand the life enhancing care given by the support staff. I value the work of the organisation, and wish to contribute to its ongoing success.

Laura Bannerman (Company Secretary/Treasurer)



I joined the Inclusion Group in December 2016. I came to the organisation with a long experience of working in social work and social care and of partnership working and wanted to put my professional experience and knowledge at the disposal of the Board of the Inclusion Group. To this end I have been very pleased to provide support to the Management Team of the Inclusion Group and service in the role of Secretary and Treasurer.

Elizabeth Soutar (Chair, Special cases Standing Committee)



I joined the Inclusion Group as administrator in 1998 when the organisation was first launched. Over the next three years I took on various roles before leaving to take up a teaching post. I joined the Board in 2008 and I am currently vice Chair of the organisation and Board Lead HR.

Stephen Swann (Director)

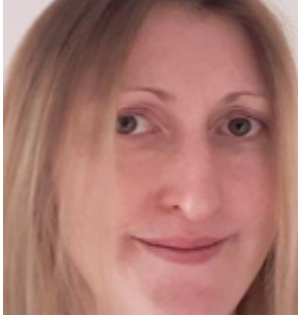


I was employed by the organisation between 2008 and 2021 as a support worker. I served as the staff representative within the organisation between 2015 and 2021. In August 2021 I left the organisation to take a social work role following the completion of my MSc in Social Work at Dundee University. I have also previously worked as a journalist, I joined the Board in 2016, I am vice Chair and Board lead media and communications.

Our Board



Stella Meachum (Director)



I am the mother and main carer of three children with addition support needs, who are also service users of the Inclusion Group Dundee. I know that at least one of my children is going to need lifelong support. I felt that I would like to become a member to have more of an idea of how the service is run, and have some input in future decisions or direction. Having the support of the service as a family has really made a difference to our lives. I really wanted to see the Inclusion Group go from strength to strength, so was delighted to be invited to join the Board of Trustees and have agreed to take the lead on Carer Representation and to offer a carers perspective.

Joanna Wright (Staff Representative) until November 2023



Over the past 2 years, I have really enjoyed the opportunity of being Staff Representative. I have found the experience really interesting to see things from behind the scenes, being able to contribute to important decisions and seeing how the organisation has travelled.

It has been a great experience supporting people with issues they have raised with me, networking with senior colleagues and understanding how decisions are reached.

My term as Staff Representative has come to an end as of November 2023, however I am pleased to hand over the baton to give a colleague the same development opportunity I have had and I will offer my guidance and support to the new Representative.

Strategic Priorities 2023 and beyond



OUR MISSION

To promote and secure improvement in the quality, choices and access to enabling activities, community support and care in and around the environ of Dundee for adults and children with additional support needs

OUR VISION

For our people to have the kind of life where they have:

Opportunities for choice, involvement and independence

Receive the highest standard of support to achieve goals to enjoy life

Feel treated with dignity, respect and positivity

Feel equal, included and safe

OUR AMBITION

To be a well run, well governed and sustainable organisation which is a good place to work.

To be a standard setter , exceeding local and national standards.

OUR AIMS

To be identified as an organisation that reliably provides services in line with national and local policy objectives for children and adults with additional support needs.

To support individuals to look to their future have confidence in their abilities and take an active role as citizens in their own communities

For family carers to feel supported and included;

To have a highly motivated and engaged workforce that is respected as standard bearing in our area of service delivery.

Strategic Objectives



1. Expand the range of opportunities and services available to our service users by building knowledge and partnerships in our local community and beyond.

(This objective is to ensure our service users have choice and access to a range of opportunities to meet their desired outcomes.)

2. Encourage more activity with those who use our services, family carers and our staff group by involving them in helping shape the Inclusion Group organisation and service in the future.

(This objective is to ensure we are a properly inclusive organisation that is empowering to those who use the service and their family/carers.)

3. Promote and support a culture of innovation and continuous improvement with the Inclusion Group Dundee by encouraging and supporting the development of, and implementation of, new ideas and approaches that meet the aspirations of our service users and their family/carers and our staff.

(This objective is about promoting learning and creativity in our organisation and fostering a sense of ownership and engagement between our staff and our board.)

4. Review our model of service delivery and management structure to make it suitable and adaptable to a flexible model of service delivery for our service users and staff.

5. Enhance the use of our systems and streamline our process to be compatible with the model of service delivery and enhance our communication and collaboration with our stakeholders.

6. Develop our systems and reporting to be focussed on measuring and reporting on the impact of our service and activities by implementing new data reporting and analysis

7. Continue to build a sustainable and resilient organisation by ensuring the effective management of people and resources, financial stability and strong governance.

(This objective is aiming to position the Inclusion Group as a sustainable organisation for the future that provides a flexible service that is in line with national and local policy objectives and that is able to adapt to change in the future)

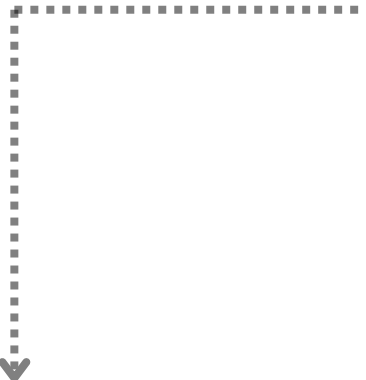
Our Structure



The Inclusion Group - Board of Directors



Louise Craig
Executive Director



Marina Walker
Business Manager



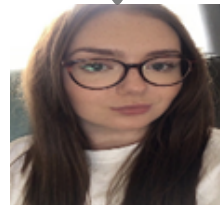
Kara Ward
Adult Service Manager



x2 Team Leaders
x1 vacancy



x1 Key Worker
x14 Support Workers



Robyn Peters
Children's Service Manager



x3 Team Leaders



x16 Support Workers

The difference we have made

2022/23

Our services offer a range of activities and we encourage our Service Users to get fully involved throughout the year. We aim to make a real difference to the lives of the people we support by reducing any form of isolation, creating a community and friendships, providing opportunities and encouragement and have great fun supporting our Service Users to live their lives to the fullest.

Throughout the year we captured some snaps from our favourite times



We visited the Animal Park, fed the animals and had great times with friends



The difference we have made 2022/23



GOOD
TIMES



Our Service Users love to enjoy the festivities of Christmas, St Patricks Day and Halloween each year. Our Team take great pride and pleasure in working with our Service Users to organise and plan parties, helping the people we serve to have a say in how we do things.

We often see people come to life and let their hair down during our celebratory events and it's always great to see people grow in confidence and make new friends.

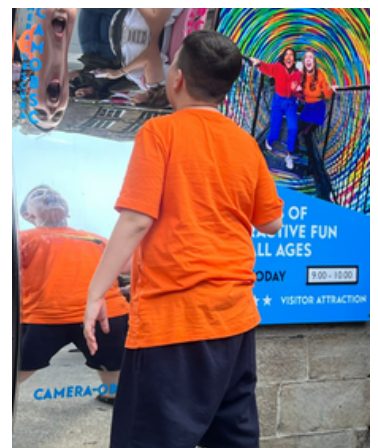


The difference we have made

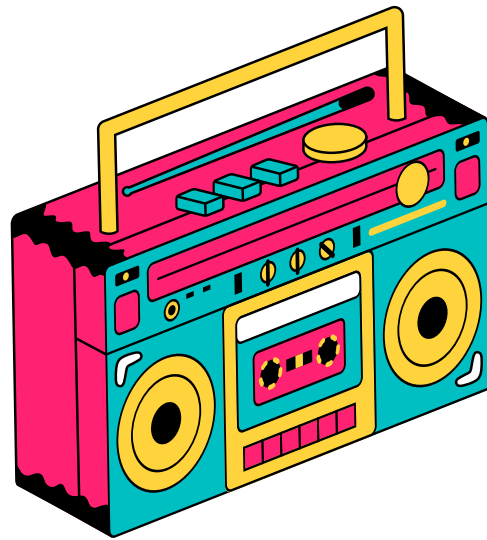
2022/23



Our Children's Service had fun trips throughout the year bringing new experiences and adventures for Children and Young People



Dean's Year....



Dean has been part of The Inclusion Group community for a number of years. Dean is our in house DJ, always making sure that his friends have a great playlist at events and parties held in our centre. His broad range of music knowledge is a real talent and he loves listening to music and making sure everyone has a good time dancing and singing along with his tunes.

Dean lives at home with his Dad, sister and also his niece. He has a cat and generally likes animals. He is particularly fond of the pool table when visiting the centre and regularly beats our staff team in pool competitions. He also enjoys games nights and loves to have a bar supper with some of his pals from our group.

Over the past year Dean has really grown in confidence and has begun interacting much more with staff and other service users, whilst he has always been able to make tea and coffee, he is much more willing to offer to make drinks for everyone and makes others feel really welcome. He has taken part in our energy group and has really enjoyed our trips away to Blairgowrie and St Andrews.

Dean has told us that he would love to see more pool tournaments taking place and he is confident that he will win some prizes.

The Inclusion Group Staff enjoy having Dean around, he is a calming influence on some of his friends and it is great to see him become more involved in the activities and really enjoy himself along the way.

GO DEAN!!!



Training and Development

Throughout 2023 we have continued to focus on meeting our regulatory requirements by making sure that staff are allocated regular development time to stay up to date with important mandatory training to help them confidently undertake their roles



We have continued to use the lessons learned throughout the COVID pandemic and use digital learning platforms to help us make sure that our training content is up to date and accessible for staff from electronic devices.

We are also pleased to be able to offer our staff in person training for more technical learning such as medication and feeding.

Congratulations are extended to all staff who have worked so hard over the past year to ensure that their skills, training and knowledge are kept up to date.

We continue to offer our staff team the opportunity to meet the requirement of their registration by achieving the SVQ Level 3 and are delighted that a number of our staff have progressed with this over the year.

In to 2023/24 we have applied for some funding to further support staff achieve SVQ and all staff will have a Personal Development Plan in place which set out their goals and progress to achieving these.



Our Accounts

The Inclusion Group (Dundee)
A company limited by guarantee
(Company Registration No SC169412)

Report of the independent auditor to the directors and members of
The Inclusion Group (Dundee)

Opinion

We have audited the financial statements of The Inclusion Group (Dundee) for the year ended 31 March 2023 which comprise the Statement of Financial Activities, the Balance Sheet and the related notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

This report is made exclusively to the members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006 and to the charitable company's trustees, as a body, in accordance with Section 44 (1) (c) of the Charities and Trustee Investment (Scotland) Act 2005 and Regulation 10 of the Charities Accounts (Scotland) Regulations 2006 (as amended). Our audit work has been undertaken so that we might state to the charitable company's members and to the charitable company's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company, the charitable company's members as a body and the charitable company's trustees as a body, for our audit work, for this report or for the opinions we have formed.

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2023 and of the charitable company's incoming resources and application of resources for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and Regulations 6 and 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended).

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

The Inclusion Group (Dundee)
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Report of the independent auditor to the directors and members of
The Inclusion Group (Dundee) (cont'd)

Other information

The trustees are responsible for the other information. The other information comprises the information included in the annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion based on the work undertaken in the course of our audit

- the information given in the directors' report, which includes the directors' report prepared for the purposes of company law, for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In light of the knowledge and understanding of the charitable company and their environment obtained in the course of the audit, we have not identified material misstatements in the directors' report included within the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 and the Charities Accounts (Scotland) Regulations 2006 require us to report to you if, in our opinion:

- adequate and proper accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies regime and take advantage of the small companies exemption in preparing the trustees' report.

Responsibilities of trustees

As explained more fully in the statement of directors' responsibilities statement set out on page 5, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

The Inclusion Group (Dundee)
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Report of the independent auditor to the directors and members of
The Inclusion Group (Dundee) (cont'd)

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements. As part of an audit in accordance with the ISAs (UK), we exercise professional judgement and maintain professional scepticism throughout the audit.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud, is detailed below.

In identifying and assessing the risk of material misstatement due to non-compliance with laws and regulations we have carried out the following:

- Ensured that the engagement team have the appropriate competence, capabilities and skills to identify or recognise non-compliance with laws and regulations;
- Identified the specific laws and regulations applicable to the entity through discussions with directors and management and through our own knowledge of the sector;
- Focused on the laws and regulations we consider may have a direct effect on the financial statements, including FRS 102, the Companies Act 2006 and tax compliance legislation;
- Reviewed the financial statement disclosures and tested these to supporting documentation to assess compliance with applicable laws and regulations;
- Made enquiries of management;
- Reviewed minutes of meetings of those charged with governance; and
- Ensured the engagement team remained alert to instances of non-compliance throughout the audit.

In identifying and assessing the risk of material misstatement due to irregularities, including fraud and how it may occur, the potential for management bias and the override of controls we have:

- Obtained an understanding of the entity's operations, including the nature of its sources of revenue, to understand the types of transactions, account balances, financial disclosures and business risks that may result in risk of material misstatement;
- Vouched balances and reconciling items in key control account reconciliations to supporting documentation;
- Carried out detailed testing, on a sample basis, to verify the completeness, existence and accuracy of transactions and balances;
- Made enquiries of management as to where they consider there was a susceptibility to fraud, and their knowledge of any actual, suspected or alleged fraud;
- Performed analytical procedures to identify any significant or unusual transactions;
- Tested journal entries and other adjustments for appropriateness, and investigated the business rationale behind any significant or unusual transactions

We did not identify any matters relating to non-compliance with laws and regulations, or relating to fraud.

Because of the inherent limitations of an audit, there is an unavoidable risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. The risk of not detecting a material misstatement due to fraud is inherently more difficult than detecting those that result from error as fraud may involve intentional concealment, forgery, collusion, omission or misrepresentation. In addition, the further removed any non-compliance with laws and regulations is from the events and transactions reflected in the financial statements, the less likely we would become aware of it.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: <https://www.frc.org.uk/library/standards-codes-policy/audit-assurance-and-ethics/auditors-responsibilities-for-the-audit/>. This description forms part of our auditor's report.

The Inclusion Group (Dundee)
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(Company Registration No SC169412)

Report of the independent auditor to the directors and members of
The Inclusion Group (Dundee) (cont'd)

Use of our report

This report is made solely to the charity's members, as a body, in accordance with section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and Regulation 10 of the Charities Accounts (Scotland) Regulations 2006. Our audit work has been undertaken so that we might state to the charity's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's members as a body, for our audit work, for this report, or for the opinions we have formed.

Iain McBride MA CA (Senior Statutory Auditor)
for and on behalf of
FourM Limited
Chartered Accountants
& Statutory Auditors (Eligible to act as an auditor in terms of section 1212 of the Companies Act 2006)
Stannergate House
41 Dundee Road West
Broughty Ferry
Dundee
DD5 1NB

29 November 2023

The Inclusion Group (Dundee)
(A company limited by guarantee)
Company Registration No SC169412

Statement of financial activities
(Including income and expenditure account)
for the year ended 31 March 2023

		Unrestricted Funds 2023 £	Restricted Funds 2023 £	Total Funds 2023 £	Total Funds 2022 £
INCOME FROM:	Notes				
Donations and legacies	1	50	-	50	25,655
Charitable activities	2	126,132	1,310,783	1,436,915	1,117,107
Investment income	3	<u>7,916</u>	<u>-</u>	<u>7,916</u>	<u>701</u>
TOTAL INCOME		<u>134,098</u>	<u>1,310,783</u>	<u>1,444,881</u>	<u>1,143,463</u>
EXPENDITURE ON:					
Charitable activities	4	<u>65,332</u>	<u>1,230,018</u>	<u>1,295,350</u>	<u>1,141,827</u>
TOTAL EXPENDITURE		<u>65,332</u>	<u>1,230,018</u>	<u>1,295,350</u>	<u>1,141,827</u>
NET INCOME / (EXPENDITURE)		68,766	80,765	149,531	1,636
Transfers between funds	6	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
NET MOVEMENT IN FUNDS		68,766	80,765	149,531	1,636
RECONCILIATION OF FUNDS:					
TOTAL FUNDS BROUGHT FORWARD		<u>620,260</u>	<u>25,284</u>	<u>645,544</u>	<u>643,908</u>
TOTAL FUNDS CARRIED FORWARD		<u>689,026</u>	<u>106,049</u>	<u>795,075</u>	<u>645,544</u>



Directors Report



I am delighted to be writing my annual report in my first year as Executive Director with The Inclusion Group. Since commencing my role I have had an enormous welcome from our Service Users, Staff Team, Board, Members and Families and I am very grateful to you all for helping me settle in to my new post.

Over the past year we have supported **42 Adults and 25 children** across our services and I can see that our services have been very positive for our Service Users and their families. Whilst we continued to adjust following the COVID pandemic, we have tried to take some of the lessons learned from that time and build on those lessons. By offering mobile phone devices to our team, creating new digital ways of working and reviewing our tools and technology in the centre we hope to be able to bring more improvements throughout 2023/24.

We really enjoyed being able to bring our group activities back throughout 2022 and in to 2023, with our Friday night groups bringing joy, and making memories for our supported people. I think the photographs say it all. Our trips to different locations across Scotland also proved a huge hit and it was great to see that even in the colder weather our Service Users and Staff had a great time exploring.

Over the next 12 months we have lots of exciting plans ahead, our new Management Team are very focussed on making sure that our Service Delivery Performance is prioritised, staff are supported and well led to continue to deliver good frontline care whilst understanding the important and positive role they play in helping the organisation meet its Strategic Objectives. We will focus heavily on staff training, staff wellbeing, updating our resources and premises, working with families to explore the most suitable timetables, broadening our digital footprint and resources and launch our new website at the beginning of 2024.

In order to achieve our Strategic Objectives we will build strong individual relationships with our Service Users and families. We will bring families together to share knowledge, resources and support and create opportunities to further hear the voices and opinions of Service Users and our Staff Team. We will also engage with and help to develop partnerships across the city to produce great outcomes for Service Users and promote Inclusion for all.

I would very much like to thank the Board, Management Team and Staff who have worked very hard over the past year to continue to make a positive difference to the lives of Service Users. Thanks must also be given to the Dundee Health and Social Care Partnership, Dundee City Council Children and Families Service and other local authorities for providing the funding to enable The Inclusion Group to provide the support which helps people to live full and active lives. Further thanks must be expressed to the other voluntary organisations who support The Inclusion Group to enjoy meaningful activities in the community.

Finally, but importantly I would like to thank the people who use our services for inspiring our organisation to make improvements, for the patience given throughout more challenging periods and for the joy and learning you bring to our community. I am very optimistic about working with you all in the future to create more opportunities and further strengthen the work of The Inclusion Group.

Louise Craig

Executive Director

