

GENERATIONS WORKING TOGETHER

A Scottish Charitable Incorporated Organisation (SCIO)

Annual Report & Financial Statements

For the year ended

31 March 2019



**Generations
Working
Together**

Scottish Charity No SC045851

ANNUAL REPORT & FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2019

CONTENTS

Trustees' Annual Report	3 - 7
Independent Examiner's Report	8
Statement of Receipts & Payments	9
Statement of Balances	10
Notes to the Financial Statements	11- 13

TRUSTEES' ANNUAL REPORT

FOR THE YEAR ENDED 31 MARCH 2019

The trustees are pleased to present their report and financial statements together with the independent examiner's report for the year ended.

REFERENCE AND ADMINISTRATIVE DETAILS

Charity Name Generations Working Together

Charity Number SC045851

Principal Address 3rd Floor Brunswick House
51 Wilson Street
Glasgow
G1 1UZ

Website Address www.generationsworkingtogether.org

Current Trustees	George Kay	Chair
	Arthur Donaldson	Treasurer
	Ewan Fisher	
	Margaret McLeod	
	Jude Currie	Appointed 28th August 2018
	Elizabeth Anne Bryan	
	Natalie McFadgen	
	Anne Callaghan	Appointed 29th May 2019
	Gino Satti	Appointed 29th May 2019
Graham Hewitson		

Other Trustees who Served During the Year

Dr Alan John Hatton-Yeo	Retired 28th August 2018
Jim McBrierty	Retired 11th February 2019
Catherine Lang	Retired 6th December 2018

STRUCTURE GOVERNANCE AND MANAGEMENT

Governing Document

The Charity is a Scottish Charitable Incorporated Organisation (SCIO) having previously being a project within the Scottish Mentoring Network. Generations Working Together received charitable status on the 29th July 2015 with charity number SC045851.

Appointment of Trustees

Generations Working Together is a two tier Scottish Charitable Incorporated Organisation (SCIO)

The Board consists of;

- A minimum of five and a maximum of eleven trustees elected by the Voting Members to serve for a period not exceeding three years;
- The Board may at any time appoint any general member to be a Trustee.

TRUSTEES' ANNUAL REPORT

FOR THE YEAR ENDED 31 MARCH 2019

Eligibility

Elected trustees must be members of the organisation. Co-opted trustees may, but are not required to, be members of the association.

Retiring trustees are eligible for re-election or may be co-opted again provided that no trustees may serve more than two terms of three years.

The GENERAL members – are anyone who applies to join the charity. These individuals elect their local network representative as voting members.

The VOTING members – who have the right to attend voting members' meetings (including any annual general meeting) and have important powers under the constitution in particular the voting members can appoint general members to serve on the board and take decisions on changes to the constitution itself.

The BOARD (who are the CHARITY TRUSTEES) – hold regular meetings, and generally control the activities of the organisation; for example, the board is responsible for monitoring and controlling the financial position of the organisation.

Organisational Structure

The trustees normally meet four times per year to consider the business of the charity.

The day to day operations of the charity is delegated to the National Development Manager who provides detailed information to the Trustees.

OBJECTS & ACTIVITIES

The organisation's purposes are;

- a) The promotion of intergenerational relationships to further the relief of those in need by reason of age, health, disability or other disadvantage.
- b) The promotion of equality and diversity.
- c) The advancement of citizenship and community development.

These three objectives are the primary purposes of the charity however, it is hoped that through these activities that Generations Working Together will also be able to report on the advancement of education, health and wellbeing.

ACHIEVEMENTS & PERFORMANCE

The past few years has clearly demonstrated to the Board of Trustees the very real growth of interest in Intergenerational work from across Scotland and further afield. This has manifested itself in growing initiatives from Government, Local Government, the Third Sector, Private and Public businesses, Educational Institutions as well as Individuals.

We are delighted and encouraged that Generations Working Together is acknowledged as being amongst the primary organisations in Scotland in promoting the very real needs of our society in breaking down barriers such as isolation and loneliness. We proudly sit on various Scottish Government national implementation groups, cross party groups and short life working groups (most recently intergenerational housing and co living and now volunteering).

We see in front of us a huge potential of opportunity to make a big difference in our local communities which will have a positive impact on all generations not just the young and old, which matches our ambitions. Our achievements and performances are listed in detail below:

Local networks

Due to funding reductions Generations Working Together (GWT) took the decision to reduce the number of local networks from 22-18. Each network met 2-3 times with a total of 50 network meetings being held with 552 attendees giving a slight increase on average attendance to 11. The meetings were supported by GWT Development Officers and 16 volunteer coordinators.

TRUSTEES' ANNUAL REPORT

FOR THE YEAR ENDED 31 MARCH 2019

Developing intergenerational skills and knowledge levels

- At the beginning of the year we spent a few months updating the Intergenerational Training Course for Practitioners and Trainers – Edition 2
- We delivered five Intergenerational (CPD accredited) one day training course (Edition 2) in Edinburgh, Dumfries, Alloa, Lanarkshire & Fife involving 67 trainees
- We delivered two accredited 6-week online training courses in partnership with the University of Granada – International Certificate in Intergenerational Learning (ICIL) - 34 students (80% students from Scotland and a few from England, Wales, Quebec, Canada and Australia)
- We recruited and trained two new tutors for the ICIL training course
- In partnership with Age Scotland, GWT designed a new training course for the workplace – Age awareness for Intergenerational teams

Our national conference, held in the University of Strathclyde, opened with a welcoming address from our Minister for Older People and Equalities, Christina McKelvie MSP. The day involved 128 delegates and a range of speakers including Jackie Kay, Scottish Makar, an intergenerational dance company and a fashion show hosted by an intergenerational project. Workshops covered different themes such as financial resilience, measuring impact, mentoring, improving achievement and attainment in education, languages, art and impact and creating relationships through physical activity.

The Generations on Screen project involved five Renfrewshire care homes (8-10 residents in each home) and five local primary schools (8-10 children) worked alongside a professional storyteller and filmmaker to create a series of short films sharing stories across the generations. These stories were interwoven, spinning fact and fiction, real life with imagination to create a tapestry of words and images. The films can now be viewed on GWT's Youth Tube channel and website.

The Connecting Generations project started in Sept 2017, developed as the first education pilot in Scotland working with two schools in the Perth & Kinross area. An Intergenerational Development Officer was recruited to train older volunteers to support young people develop their literacy and numeracy skills. The Community School of Auchterarder and Perth Grammar School contributed funding from their Pupil Equity Fund and agreed to a second year. The pilot is still in progress with the CSOA continuing on their own as of September 2019 and Perth Grammar continuing with the support from GWT. GWT expect to be able to share results from this project over the next year.

Ayrshire Intergenerational Event held in partnerships with the Care Inspectorate's CAPA team - The aim was to bring together older adults and early years services to improve understanding of true intergenerational practice, the importance of physical activity for both generations, introduce quality improvement to sessions and spend time networking, sharing experiences and ideas in order to improve the quality and outcomes of intergenerational practice across Ayrshire. One hundred people attended from a variety of organisations including Ayrshire care homes, early childhood centres and primary schools. The evaluation was extremely positive with over 90% reporting that the event was extremely useful and over 80% feeling more confident to set up intergenerational sessions and or make improvements to current sessions. Over 80% wanted to attend similar events in the future.

GWT supports local authorities (Fife, City of Edinburgh, Dumfries & Galloway, Scottish Borders, Stirling and Clackmannanshire) in building and planning spaces where people of different generations can attend and feel comfortable in. Such as the Scottish Borders Education department for their Jedburgh Intergenerational Community Campus on how they can have a truly intergenerational campus, to Fife Council on their new care village comprising a care home and early years centre and to Newbyres Nursery who are planning to host on their premises the first co-located elderly day care and early yearly provision facility in Scotland.

GWT continues to develop close working relations with **International partners** including the University of Granada, Spain, Penn State University and Intergenerational Schools, Ohio, (USA), LGNI (Northern Ireland), University of Queensland (Australia), Torbay Council, Beth Johnson Foundation & Apples & Honey Nightingale (England), Shaw Trust & University of Bangor (Wales)

GWT continues to **build partnerships** with University of Stirling, University of Glasgow, University of Strathclyde, University of Edinburgh and Napier.

TRUSTEES' ANNUAL REPORT

FOR THE YEAR ENDED 31 MARCH 2019

The Board have been busy revising GWT's business plan to reflect the changing context both political and financial. This has involved identifying clear priority areas for action and the need to both increase core funding and diversify our sources of income.

Successes

- GWT won a Scottish Sensory and Equality Award in 2019 for our 'Outstanding approach to promoting partnership working across all services for people with a sensory loss in Scotland
- GWT launched a new Intergenerational Guide in Early Learning and Childcare
- Six National Recognition Awards were presented and celebrated at the conference in March 2019 including awards for the most innovative project, most improved project, promoting achievement and attainment in education, contribution to reducing loneliness and isolation, volunteer of the year and lastly local network coordinator award.
- GWT signed a four-year partnership with the Soil Association to produce an intergenerational training programme and resources specifically designed for the Food for Life Get Together initiative
- Connecting Generations projects continuing for a 2nd and 3rd year
- New intergenerational research network formed with 58 members and 33 attendees at the first meeting
- We encouraged and supported volunteer coordinators and trustees to represent GWT at national and local conferences and events including Age Scotland Conference, SNP Conference, Cross Party Groups (Ageing & Older people, Volunteering in Schools and Housing), Older People's Action Group, Older people's Development Group, Scottish Older People's Assembly, Future Scotland Scottish Parliament and at evening receptions in Parliament (Age Scotland, SOPA, Royal Blind Society).
- GWT supported the Scottish Book Trust to develop an intergenerational toolkit for their Intergenerational Rebel Writing Campaign. The project encouraged primary and secondary pupils across the country to create a personal or collaborative piece that was based on stories gathered from the older generation. Pupils were encouraged to chat to their grandparents or residents from your local care home. A selection of about 30 stories were then published and distributed during Scottish Book week in November 2018.
- GWT supported a Character Scotland Inspiring Purpose Poster activity –The idea of the poster competition was for grandparents, or senior family friends, and grandchildren aged eight to 16 to collaborate on completing a poster together so that they can discuss and reflect on values and qualities, an inspirational figure or story, choose and discuss a poem and painting or photo related to the War, and reflect on the value of human life.

Overview

The trustees raised a total of £133,817 (2018: £149,694) within this financial year, with the main funder continuing to be the Scottish Government. Expenditure totalled £153,602 (2018: £122,027) with the main expenditure items being staff salaries and expenses incurred on carrying out its charitable activities, including the annual conference, local networking and training delivery.

Risks

The key threat to GWT's ongoing operations is further loss of funding. In 2015 our core funding was changed to project funding with a further reduction of over 40%, resulting in the need to cut costs by reducing staff hours and closing local networks. The effect of this has been to significantly reduce GWT's reach and capacity to support new intergenerational projects.

TRUSTEES' ANNUAL REPORT

FOR THE YEAR ENDED 31 MARCH 2019

Without an increase in core funding the ongoing viability of GWT will be under serious threat. Efforts are being made by staff and trustees to find new sources of funding, but this has proved challenging and efforts are limited by a lack of resources available to identify and respond to funding opportunities (due to a reduction in staffing levels necessitated by reduced funding).

Donated Facilities & Services

Volunteer support continues to play a key role within the organisation with volunteer trustees (385 hrs +), local network coordinators (100hrs+) and intergenerational volunteers (1540hrs+) donating over 2,025 hours of their time. This could relate to a cost of over £20,250.

GWT would like to thank the McQuade Hotel Group for kindly sponsoring the conference by providing bed and breakfast to a number of GWT Conference speakers and volunteers to an approximate cost saving of £1425. The McQuade Group offers hotel and self-catering accommodation to the west of the city centre and are a privately owned group aiming to promote quality and consistency throughout their Glasgow hotels and apartments.

The trustees would like to thank the service provided by all of the charity's volunteers who helped contribute towards the success and achievements made within this past year.

Reserves Policy

The trustees believe it should hold around £45,000 in reserves to meet its commitments to staff, landlord and other creditors, should the charity have to dissolve for any reason. The reserves of the charity at the period end were £19,254 (2018: £29,153). The trustees are aware that this is below the level they aspire to and are actively seeking other funding avenues.


FUTURE PRIORITIES

- Increase knowledge of intergenerational practice
- Promote and support innovation in intergenerational practice
- Influence national and local policy
- Increase participation in intergenerational practice
- Sound governance

APPROVAL

This report was approved by the trustees on 28 August 2019 and signed on their behalf by:


George Kay
Chair


Arthur Donaldson
Treasurer

INDEPENDENT EXAMINER'S REPORT

FOR THE YEAR ENDED 31 MARCH 2019

Independent Examiner's Report to the Trustees of Generations Working Together

I report on the accounts of the charity for the year ended 31st March 2019, which are set out on pages 9 to 13.

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) Act 2005 ("the 2005 Act") and the Charities Accounts (Scotland) Regulations 2006 (as amended) ("the 2006 Regulations"). The trustees consider that the audit requirement of Regulation (10)(1)(d) of the 2006 Regulations does not apply.

It is my responsibility to examine the accounts under section (44)(1)(c) of the 2005 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 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 connection with my examination, no matter came to my attention:-

1. which gives me reasonable cause to believe that in any material respect, the requirements
 - to keep accounting records in accordance with section 44(1)(a) of the 2005 Act and Regulation 4 of the 2006 Regulations, and
 - to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Regulationshave 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.



Anne Knox, FCIE

Community Accountancy Scotland C.I.C.

Jubilee House

Forthside Way

Stirling

FK8 1QZ

28th August 2019

STATEMENT OF RECEIPTS & PAYMENTS

FOR THE YEAR ENDED 31 MARCH 2019

	Note	Unrestricted Funds	Restricted Funds	Total 2019	Total 2018
Receipts		£	£	£	£
Grants	5	4,000	116,315	120,315	112,872
Charitable Activities		-	-	-	25,530
Trading Income		13,307	-	13,307	11,020
Other Income		195	-	195	272
		17,502	116,315	133,817	149,694
Payments					
Charitable Activities Payments	6	21,547	131,805	153,352	121,207
Governance Costs		-	250	250	820
		21,547	132,055	153,602	122,027
Net movement in funds		(4,045)	(15,740)	(19,785)	27,667
Transfers between funds		(6,635)	6,635	-	-
Surplus/(Deficit) for year		(10,680)	(9,105)	(19,785)	27,667

The Notes on pages 11 to 13 form an integral part of these accounts.

STATEMENT OF BALANCES

AS AT 31 MARCH 2019

	Unrestricted	Restricted	Total	Total
Note	Funds	Funds	2019	2018
Funds Reconciliation				
	£	£	£	£
Balance as at 01 April 2018	29,934	29,709	59,643	31,976
Surplus/(Deficit) for year	(10,680)	(9,105)	(19,785)	27,667
Balance as at 31 March 2019	19,254	20,604	39,858	59,643
Bank & Cash Balances				
Cash at Bank	17,618	20,604	38,222	59,206
GCVS	1,636	-	1,636	437
	19,254	20,604	39,858	59,643
Other Assets				
Trading Income Due			-	-
Apple Computers			720	1,028
Money Due To			-	730
			720	1,758
Liabilities				
Independent Examiners Fee			420	250
HMRC			-	1,975
Invoices			390	390
			810	2,615

The Notes on pages 11 to 13 form an integral part of these accounts.

These accounts were approved by the trustees on 28 August 2019 and signed on their behalf by:



George Kay
Chair



Arthur Donaldson
Treasurer

NOTES TO THE FINANCIAL STATEMENTS

AS AT 31 MARCH 2019

1. Basis of Preparation

These accounts have been prepared on the receipts & payments basis in accordance with:

- (a) The Charities and Trustee Investment (Scotland) Act 2005
- (b) The Charities Accounts (Scotland) Regulations 2006 (as amended)

There have been no changes to the basis of preparation or to the previous year's accounts.

2. Fund Accounting

- (a) Unrestricted funds are those that can be expended at the discretion of the trustees in the furtherance of the objects of the charity.
- (b) Restricted funds are those that may only be used for specific purposes. Restrictions arise when specified by the donor, or when funds are raised for specific purposes.
- (c) The purposes of the funds are shown in Note 9.

3. Taxation

- (a) The charity is not liable to corporation tax or capital gains tax on its charitable activities.
- (b) The charity is not registered for VAT, thus all costs are shown inclusive of VAT charged.

4. Transactions with trustees and related parties

- (a) No remuneration was paid to any trustees during the year (2017: £Nil).
- (b) Travelling expenses totalling £508 (2017 : £647) were reimbursed to 1 trustee (2017 : 3 trustees).

5. Analysis of Grants

	Unrestricted Funds	Restricted Funds	Total 2019	Total 2018
	£	£	£	£
Big Lottery - Awards For All	-	-	-	10,000
Centenary	-	1,600	1,600	-
Scottish Government (Equality & Cohesion Fund)	-	70,000	70,000	75,000
Perth & Kinross	-	25,530	25,530	-
SCPHRP	-	-	-	202
Voluntary Action Fund	-	-	-	10,000
Learning Link Scotland	4,000	-	-	-
Scottish Government (OPSAF)	-	3,685	3,685	-
The Gannochy Trust - Perth & Kinross	-	12,500	12,500	10,000
Glasgow City Council - Seri	-	2,500	2,500	2,000
SCVO - Cyber Essentials	-	500	500	5,670
	4,000	116,315	116,315	112,872

NOTES TO THE FINANCIAL STATEMENTS

AS AT 31 MARCH 2019

6. Analysis of Charitable Activities Payments

	Unrestricted	Restricted	Total	Total
	Funds	Funds	2019	2018
	£	£	£	£
Staff Salaries	14,143	88,678	102,821	75,548
Regional Development Officers	-	2,147	2,147	10,098
Staff Expenses	-	6,041	6,041	5,118
Organisations Costs	-	1,826	1,826	904
Events	-	600	600	758
IT Support/Tel	-	954	954	1,015
Awards/Marketing/Publications	-	849	849	956
Travel Costs	140	57	197	-
Payroll costs	-	576	576	510
Volunteer Expenses	-	3,214	3,214	1,438
Local Networking Support	-	2,466	2,466	2,567
Office Equipment/Stationery	-	698	698	486
IT Costs	2,400	799	3,199	1,447
Recruitment	-	1,023	1,023	230
Office Rental/ Insurance	-	5,211	5,211	2,924
Print/Post/Tel/Sundry	-	1,432	1,432	974
Printing & Publications	1,000	532	1,532	974
Training Delivery	2,928	1,064	3,992	6,606
Staff Training & Development	600	398	998	167
Volunteer Training	-	371	371	236
Conference	-	4,324	4,324	5,432
Office Costs	281	990	1,271	296
Activities	-	1,430	1,430	1,023
StoryTeller/Film Making	55	6,125	6,180	1,500
	21,547	131,805	153,352	121,207

NOTES TO THE FINANCIAL STATEMENTS

AS AT 31 MARCH 2019

7. Movement in Funds

	As at				As at
	31/03/2018	Receipts	Payments	Transfers	31/03/2019
	£	£	£	£	£
Unrestricted Funds					
General Fund	29,934	17,502	(21,547)	(6,635)	19,254
Restricted Funds					
Big Lottery - Awards For All	6,369	-	(6,369)	-	-
Centenary Fund	-	1,600	(1,600)	-	-
Seri	-	2,500	(2,500)	-	-
Scottish Government Fund	-	73,685	(84,290)	10,605	-
Perth & Kinross Fund	23,340	38,030	(37,296)	(3,970)	20,104
SCVO Cyber Essentials	-	500	-	-	500
	29,709	116,315	(132,055)	6,635	20,604
Total Funds	59,643	133,817	(153,602)	-	39,858

8. Transfer between funds

£10,605 was transferred from the General Fund to the Scottish Government Fund to meet that costs not covered by the restricted funding

£3,970 was transferred from the Perth and Kinross Fund to the General Fund as a contribution towards management costs as per funding application

9. Purpose of funds

General fund	An unrestricted fund that can be expended at the discretion of the trustees in furtherance of the objects of the charity.
Big Lottery – Awards for All	Monies received for a project involving four Renfrewshire care homes and four primary schools to work alongside a professional story teller and filmmaker to create a series of short films to be shared across our national and international network, demonstration the power of intergenerational approaches.
Scottish Government	monies received to build a stronger and mutually beneficial working partnership between GWT and organisations and groups who work with people who fall under the protected characteristics of age, disability and race.
Perth & Kinross Fund	monies received from Perth and Kinross Local Authority and the Gannochy Trust to engage with people of all ages across Perth and Kinross to increase confidence in running intergenerational projects, which reduce discrimination, loneliest and isolation and build stronger communities.
SCVO – Cyber Essential	monies received towards the costs of instructing a consultant to check the digital systems of the charity.
Centenary fund	monies towards events to celebrate the suffragette movement.

NOTES TO THE FINANCIAL STATEMENTS

AS AT 31 MARCH 2019
