

Registered Charity Number  
1065062

Registered Company Number  
03409412

UK Centre for the Advancement of Interprofessional Education (CAIPE)

Report and Accounts

31 March 2017

**UK Centre for the Advancement of Interprofessional  
Education (CAIPE)  
Report and accounts  
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## **UK Centre for the Advancement of Interprofessional Education (CAIPE) Company Information**

### **Directors and Trustees**

<b>President</b>	Hugh Barr
<b>Chairman</b>	Richard Gray
<b>Treasurer</b>	Elizabeth Howkins
<b>Vice Chair</b>	Richard Pitt
	Sundari Joseph
<b>Secretary</b>	Ann Ewens
	Pat Bluteau
	Jenny Ford
	Ivan Birch
	Maggie Hutchings
	Kathrin Parkin
	Jayne Frisby
	Marion Helme
	Veronica O'Carroll
	Shobhana Nagraj
	Alison Machin
	Scott Reeves
	Amanda Squire

### **Registered office**

126 High Street  
Oxford OX1 4DG

### **Independent Examiner**

Mrs Sarah A Smith BSc. (Hons) FCCA FCIE  
Temple House  
8 Main Street  
Cold Overton Oakham  
LEICS LE15 7QA

### **Bankers**

Lloyds TSB  
3 Porchester Gate  
112B Castle Street  
Portchester  
Fareham  
PO16 9QG

### **Charity registered number**

1065062

### **Company registered number**

03409412

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

For the year ended,  
**31 March 2017**

#### **Introduction**

The trustees have pleasure in submitting their report and the financial statements for the year ended 31 March 2017.

The directors of the charitable company (the charity) are its trustees for the purpose of charity law and throughout this report are collectively referred to as the trustees. Their responsibilities include all the responsibilities of directors under the Companies Acts and Trustees under the Charities Act. This trustees report incorporates the directors report required by the Companies Act 2006.

#### **Structure, Governance and Management**

CAIPE, a company limited by guarantee and not having a share capital, is governed by the conditions contained in its Memorandum and Articles of Association. In accordance with the governing documents, the Board is made up of no fewer than three and no more than twenty five trustees.

Copies of these documents are available from the Registered Office listed on the Information page.

In the event of a winding up, the liability of each member or any person who has ceased to be a member in the last 12 months is limited to one pound sterling. If upon winding up or dissolution there remains any property it shall be distributed to a charitable institution having objects similar to the company. The Board has the power to fill any vacancies arising in the year, any such appointments to be confirmed by members at the next Annual General Meeting. All appointments are for a three year term with annual retirement of 1/3 of the Board at each AGM by rotation. Any Board member may seek re election for a further full term, but thereafter may not seek re election for two years.

New trustees are briefed on their obligations under charity and company law, on the Board's decision making process and strategy and the recent financial performance of the charity.

#### **Objects Vision and Purpose**

The company is established to promote health and well being and to improve the health and social care of the public by advancing interprofessional education

#### **Public Benefit Statement**

The trustees confirm that they have had due regard, in all their decision making, as to the guidance published by the Charity Commission on public benefit.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE) The Report of the Trustees**

Continued....

### **Review of Activities and Achievements**

#### **Introduction**

This report is an important opportunity to acknowledge the valuable voluntary work achieved by individuals, particularly board and executive group members, on behalf of CAIPE. There has been much achieved by many individuals behind the scenes and all have helped during the past year to contribute to the work and continued development of CAIPE.

During the year CAIPE has continued to promote and support the need for IPE and collaborative working relating to relevant national and international bodies within health and social care. An significant event for CAIPE during the year was jointly hosting the 2016 ATBH VIII Oxford conference. In addition CAIPE has continued to respond to policy documents, developed its student membership and student awards, developed its service user and carer membership, responded to invitations to speak at national and international events, facilitated national and international interprofessional workshops, produced CAIPE publications and supported research activities. Within the organisation, CAIPE strategies, policies and systems continue to be developed to enable and ensure the continued evolution of the organisation. Most importantly, during the year the new CAIPE website has continued to be developed and updated.

During the past year there has been a continuing national recognition in the UK of the importance of collaborative practice and interprofessional education (IPE). In response CAIPE has continued to work with commissioning, educational, professional and regulatory bodies and to support and strengthen the development of the IPE curricula and work based interprofessional learning.

#### **Communication with Members**

An efficient website is fundamental in providing effective communication between CAIPE and its members. During the year our website provider has changed to Craven Digital. The transition period is completed and we are now at the stage of populating the new site. An immense amount of work has been involved and special thanks must go to Richard Pitt, Emma Beal and Debbie Holmes who have been and continue to be integral to steering this process.

The CAIPE website continues to incorporate access to social media through both Face book and Twitter. Through various CAIPE Board members and student committee we have continued to increase our tweeting, helping with increasing the awareness of CAIPE and gaining followers. The monthly production of the CAIPE E-Newsletter has been updated and streamlined with continued links to the website.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

Continued....

The Promotion Group, under the leadership of Richard Pitt has continued developing the website and is streamlining the Home Page with About Us, including continuing development of resources, standardisation of documents and references, CAIPE logo and marketing strategy with new banners, merchandise and lanyards. The website provides secure access to membership areas for the different membership categories ensuring more focused material and resources and much quicker than the previous web site. This has improved communications with members. Again special thanks to Richard Pitt and the members of the promotion team who have had a challenging task.

### **Membership**

CAIPE is primarily a membership organisation, and membership fees contribute to the majority of the annual income. Our present membership costs are as follows:

Individual membership including JIPC £95

Corporate membership including JIPC £1600

Student membership £10 annually

Service user and carer membership £5 annually.

It is anticipated that individual and corporate membership costs will stay the same for 2017-8.

CAIPE membership for the year stands as follows: Students 186 (previously 177), Individual 57 (previously 52), Corporate 30 (previously 30) and Service users 10 (previously 6).

We would like to warmly welcome the following new corporate members who have joined during the year:

Brighton and Sussex NHS Library

Royal Surrey Hospital NHS Library

University of Central Lancashire

Eastern Health Organisation, Australia

The method of communication with corporate members and their individual members has continued to be reviewed and updated. Emma Beal our membership secretary should be congratulated in coordinating communication with members and maintaining the renewal process so efficiently.

During the year the CAIPE Fellowship selection process has continued and a CAIPE Fellowship has recently been awarded to Professor Scott Reeves.

Taylor and Francis have continued to be supportive of CAIPE and its activities and this has included provision of the journal to CAIPE members maintaining the same journal costs as last year. Taylor and Francis also sponsored the 2016 ATBH Oxford Conference and the 2017 John Horder Lecture.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

Continued....

#### **Students**

The CAIPE Student Committee has continued to be engaged and pro-active in supporting CAIPE and IPE.

Following the strategy established last year we have offered funding to support students to attend conferences during the year. Two students received scholarships to attend the ATBH conference in Oxford in September 2016. Other opportunities included the Western Sussex Hospitals Student Conference in March 2017 and the Scottish Clinical Skills Network Conference in May. We are in the process of assessing applications for scholarships towards attendance at the EIPEN conference in September 2017. The Committee will be working on the way CAIPE promotes such opportunities to ensure the best possible response. For the first time we have invited video presentations from international students to be showcased at the AGM resulting in presentations from Singapore, Brazil and Qatar.

Members of the Student Committee attended the ATBH conference in Oxford and helped to support the CAIPE stand, the Health and Social Care Team Challenge and to host a student networking event. Members of the Student Committee have also been proactive in promoting CAIPE at events in the UK including student conferences in Chatham, Newcastle, Winchester and St Andrews.

Links have been established between the CAIPE Student Committee and the Promotion Working Group and the Service User working group enabling some joint work. For example, twitter chat has been planned jointly by the Student and Service User groups to take place on 29th June.

There have been several new members appointed to the committee following some outstanding applications in the latest recruitment round. This includes an international representative (from Brazil) for the first time. We have also decided to invite at least one recently graduated CAIPE member to work with the committee to strengthen our contact with people in the early stages of their careers.

Thanks to Jenny Ford, Pat Bluteau and Veronica O'Carroll and all members of the committee, especially the students, for their enthusiasm and creativity

#### **Service Users and Carers**

In 2015-16 CAIPE opened membership to service users and carers. Two service users experienced in IPE were co-opted onto the Board to work with three existing Board members on a strategy for engaging people who have used services in CAIPE. The two co-opted members have now attended board meetings and the CAIPE Forum and become more familiar with CAIPE. One outcome has been contact between one of the service user board members and the authors of a proposed textbook on interprofessional working in mental health.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

Continued....

The service users and carers task group has developed promotional materials and gained views from service user groups in a small number of universities. Following feedback from these visits the task group has developed an arrangement for group membership to connect CAIPE with service user and carer groups who work in HEIs. This arrangement will now be promoted at other HEIs. The group is also currently working on a web presence for the group to encourage interested service users and carers to make contact. At our most recent task group meeting it was agreed to strengthen our links with the Student Committee through representatives attending each other's meetings. This has resulted in plan for joint work as described in the Student Committee report.

Thanks to our service user board members for their energy and enthusiasm in taking forward this new aspect of CAIPE's work.

### **Chairs Event**

The CAIPE Chair's Event was held on 4/11/16. The morning session focused on Leadership and IPE and included a joint presentation from our 2016 CAIPE Honorary Fellows: Liz Anderson, Lesley Diack and Susanne Linqvist. This proved to be a topical theme that produced much subsequent discussion. Conclusions included the recognition of the need for more research in this area.

The afternoon session focused on the importance and educational use of stories. Initially Eli Anderson from Story Aid facilitated a workshop. This was followed by Pip Hardy who described the work of Patient Voices

### **Corporate Forum**

The CAIPE Forum meets in different parts of the UK and provides opportunity for CAIPE corporate members to present on topical aspects of IPE showcasing their initiatives and for CAIPE to update Forum members on latest developments.

In place of the October forum, a CAIPE Post ATBH conference meeting was hosted on 9/9/16. During the session the national and international work of CAIPE was highlighted and there was an opportunity to focus on themes elicited from pre-conference workshops including IPE research and the development of interprofessional learning outcome assessment. Thanks to Richard Pitt and Sundari Joseph who facilitated and organised the afternoon.

A successful March Forum with good attendance was hosted by the University of Lincoln. and entitled IPE Innovation. Following a welcome by Professor Sue Rigby, Deputy Vice Chancellor, Mark Brennan from the University of Lincoln Standing group chaired a fascinating day including a description of the IPE Journey in Lincoln and a team presentation on IPE in three domains. During the afternoon there was an opportunity to discuss topical issues and to hear student stories with representatives from adult nursing, mental health nursing and pharmacy.



## **UK Centre for the Advancement of Interprofessional Education (CAIPE) The Report of the Trustees**

Continued....

### **All Together Better Health Conference (ATBH V111) 6-9 September 2016.**

The 2016 All Together Better Health VIII conference was held in Oxford UK from 6-9 September. The conference was jointly hosted by CAIPE, Oxford Brookes University and the University of Oxford. The theme of the conference was Values Based Interprofessional Education and Practice.

The organising committee included the following representatives from CAIPE: Richard Gray (Chair of organising committee), Elizabeth Howkins (conference treasurer) and Helena Low.

The conference involved 563 registered participants from 30 different countries including key note speakers, full conference and one day registrants, students, service users and carers and bursary sponsored registrants. Bursaries were offered to those from developing countries and those with limited finances. Key note speakers and plenary sessions were held in the Sheldonian Theatre whilst the parallel and poster sessions took place in the historic University of Oxford Examination Schools. Social events included a welcome reception at the Oxford Union and a conference dinner at Balliol College

A Health and Social Care Student Team Challenge was successfully organised by a group chaired by Sundari Joseph. It was open to all students attending the conference and was held during the final morning plenary session. In addition there were pre-conference sessions including a research workshop facilitated by Scott Reeves involving the CAIPE research group.

### **Consultations**

An important activity for CAIPE is its role responding to relevant policy documents to inform and influence the thinking and development of IPE at national, local and international levels. Over the past year a small task group led up by Jayne Frisby and supported by Maggie Hutchins, Kate Parkin and Shobi Nagraj have responded to:

October 2016 GMC Standards for Postgraduate Curricula and Regulated Credentials

November 2016 HCPC Standards of education and training and supporting guidance – led by Hugh Barr

January 2017 HCPC Consultation on revised guidance on confidentiality

January 2017 HCPC Consultation on revised guidance on continuing professional development

There is currently ongoing work taking place with regards usability testing of the new NMC Education Framework.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE) The Report of the Trustees**

Continued....

### **CAIPE Publications**

#### *The Taylor & Francis/CAIPE Series*

The year end was marked by the publication of two books inaugurating the series on collaborative practice by Taylor & Francis in association with CAIPE.

Dawne Gurbutt[1] with her contributors heightens readers' awareness of some of the many situations demanding imagination and collaboration between communities, public services, not-for-profit organisations and professions to improve public health. The book challenges the interprofessional community to widen its horizons, to explore deeper and more diverse meanings of health and healthcare, pregnant with implications for professional and interprofessional education.

Julie Taylor and June Thoburn[2] make a compelling case for closer collaboration between professions and between agencies responsible for children at risk and families in crisis. Grounded in evidence, law, policy, practice and the author's wealth of experience, the book lays firm foundations for students and beginning practitioners where collaboration is paramount. Required reading: Julie and June provide the guide for which generations of students and workers have long been waiting.

Four more books in the series are in preparation on:

- Critical Care led by Scott Reeves
- Primary Care led by John Spicer and Sanjiv Alhuwalia
- Palliative Care led by Dave Roberts
- Adult mental health led by Dan Kinnair

#### *CAIPE Publications*

Work was on-going during the year to augment CAIPE's Interprofessional Education Guidelines 2016 with particular reference to practice learning and continuing interprofessional development. The Guidelines take into account findings from the UK IPE review and the growing evidence base. Addressed to all who share responsibility for the promotion, provision and oversight of IPE, the guidelines focus on ways in which it can be most effective in improving collaborative practice and quality of care grounded in CAIPE's values and principles. They steer readers step by step through the planning process for IPE interventions and strategies involving all the interested parties

**[1] Gurbutt, D. (2016) Collaborative practice in public health. Abingdon: CRC Press**

**[2] Taylor, J. & Thoburn, J. (2016) Collaborative practice with vulnerable children and their families. Abingdon: CRC Press**

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

Continued....

#### **The Research Task Group**

The CAIPE research task group has continued to grow over the past one year. Dr Shobhana Nagraj took over as the CAIPE Research group chair in March 2017 from Professor Scott Reeves, and Dr Veronica O'Carroll (Dundee) and Dr Karin Crawford (Lincoln) have joined the group.

The emphasis of the research group has shifted from a research advisory group to a research-sensitive group. Aims now include the signposting of interested individuals to relevant IPE literature, key resources and networks. This will be achieved primarily through the continued development of the CAIPE research group website which has been updated. This will include a "Contact Us" form which will be managed through a generic research email account (research@caipe.org), and will be manned by the research team on a rotational basis throughout the year.

The research group ran a pre-conference workshop at the Altogether Better Health Conference in Oxford, September 2016. This was met with very positive feedback and the group were encouraged to develop more online resources as a result to disseminate IPE research methods and important papers.

The research group are also keen to develop joint research bids and funding opportunities in interprofessional education across UK institutions (working within the scope and values of CAIPE), as well as forming research networks across UK and globally.

The group intends to further develop international research collaboration and the supporting online material. and are also developing collaborative networks overseas with suggested organisations including WONCA (World Organisation of Family Practice), Into Theory, Institute of Healthcare Canada, the World Coordinating Centre and African IPE network. We would hope to be able to share online resources between these collaborative networks and signpost those interested in IPE to these wider resources available.

#### **Links with other UK organisations**

The CAIPE chair is a member of the Education Inter-regulatory Group which meets twice a year. It is an informal and advisory group for educationalists representing all health and social care professions and during the year has provided further opportunities for CAIPE representatives to have individual meetings and constructive discussions with colleagues from professional regulators including the GMC, NMC and HCPC.

CAIPE has had regular meetings with Health Education England through contacts in HEE Thames Valley. Developments have been discussed and CAIPE has recently been awarded a grant of £20,000 to help HEE develop pilot IPE initiatives including the production of an IPE Handbook.

CAIPE has a link with the National Association of Educators in Practice, Richard Gray and Lynn Clouder (who is also NAEP vice chair and a CAIPE member) are also committee members of NAEP.

A similar link has been made with ASPIH Association of Simulated practice through CAIPE member Liz Westcott.

Pip Hardy from Pilgrim Projects is on the CAIPE board and provides a link with the Patient Voices programme and service users. Elizabeth Howkins is co-writing with Pip Hardy a chapter for a book on digital story telling on the end of life project

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

Continued....

In addition Elizabeth Howkins has continued to co-edit and provide IPE input for the development of a digital education resource; funded by NHS Durham and Darlington. The project is called : " Cultivating compassion for end of life care: an interprofessional approach". CAIPE has had a consultative role throughout the life of the project which is now almost complete.

Richard Pitt has developed strong links with Public Health England and continues to explore opportunity for collaboration.

### **CAIPE Workshops**

#### **June 2016**

Over a three day period, Richard Pitt, Hugh Barr and Helena Lowe facilitated a successful series of workshops at Zuyd University, Heerlen, Netherlands. Following this Richard Pitt and Helena Low provided coaching for 2 members of Zuyd.

#### **June 2016**

Elizabeth Howkins coordinated an event held for students from Queen's University Canada at the Bader International Study Centre Herstmonceux Castle , East Sussex. The title was "CAIPE 's work, its global initiatives and patient stories"

#### **October 2016**

Hugh Barr, Marion Helme and Richard Gray were invited to participate to the 2017 Cambridge Annual Educators Conference hosted by HEE East England. They presented a joint key note presentation entitled "How we work and learn together" and facilitated a series of workshops on Patient Safety.

#### **February 2017.**

Richard Gray was invited to the National University of Singapore and during his visit facilitated an annual IPE Faculty Development Workshop entitled "Values Based Practice and Interprofessional Education: What is the link?" The workshop introduced the concept of Values Based Practice and provided an opportunity to explore the link between IPE and VBP through the use of stories.

### **International Activities**

International outreach continued to be a major thrust in CAIPE's work, notably its support from the World Coordinating Committee, sustaining ongoing relations in Japan, Australasia, North America and Europe and facilitating networking between interprofessionally committed universities in Africa and in the Middle East.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

Continued....

#### **World Interprofessional Education and collaborative Practice Coordinating Committee**

Marion Helme has continued to act as Secretary with support from Sundari Joseph, CAIPE Vice Chair, and from Elizabeth Howkins and Richard Gray with regard to process management.

Developments in the past 12 months have included:

- 3 – 4 monthly virtual meetings and Skype discussions
- Documentation concerning the Administration, Management and Structure of the WCC and future ATBH conferences expressions of interest
- Continued links with the WHO Health Workforce Department
- A new website managed by COMBELL and the chair Andre Vyt.
- Agreement from CAIPE and WCC members for secretariat duties from two CAIPE members for the next two years. This will provide continuity of administrative support.

#### **The International Liaison Task Group**

This task group continues to develop with new members joining from our board membership, namely JuanjoBuenza (Spain) and Marion Huber (Switzerland).

There have been developments in Latin America with Juanjo's links. There are also some new developments occurring in India with Hugh Barr, Shobhana Nagraj and Sundari Joseph working with Ravi Ray and Neena Lakhani. They have contacts in India and so far favourable responses have been received from Manipal University and Christian Medical College, Vellore. The development of an all India IPE network is of interest to these contacts.

There is continued interest for international IPE contacts to visit the UK and these visits are managed by the task group.

#### **Financial Position**

The CAIPE financial position remains healthy, with surpluses on ordinary activities and after the full reimbursement of ATBH Conference costs of £22,761. The addition of a £25,000 grant from ATBH brings the total surplus to £47,761, (2016 deficit £4,898). A specific Restricted Fund of £20,000 is being maintained for grants and collaborative work as described below \*\*. More money is now being spent on membership activities, such as support for student related CAIPE activities, board members reimbursement for travel and accommodation and ongoing increases in payment of ATBH costs of staff. A policy has been drawn up to support CAIPE members who are able to promote and develop IPE across international boundaries and money has been set aside to meet the cost.

## UK Centre for the Advancement of Interprofessional Education (CAIPE)

### The Report of the Trustees

Continued....

#### 2016 ATBH Conference

Income this year includes the ATBH conference fees. The final financial results were independently examined by our accountant Sarah Smith BSc (HONS) FCCA FCIE. The conference made a substantial profit. At 31 March 2017 the fund stood at £112,423. The conference steering group firstly provided for outstanding accountancy fees, £1,875 and a contingency for remaining conference invoices of £5,000 and CAIPE administration £5,414. They then agreed to distribute surpluses as follows:

**£5,134 grant** directly to the New Zealand ATBH IX conference steering group. This is being used for start up funds initially but in the longer term will be used to offer financial help to potential conference participants from developing countries.

**\*\*£10,000 grant** to be reserved for the use of the WCC. This is being kept in a CAIPE fund. Bids for projects/initiatives can be selected and awarded by the WCC from this fund. Legally this will need agreement from CAIPE who will pay directly.

**£25,000 grant** has been paid to each of the three organisations: CAIPE, Oxford Brookes University and The Collaborating Centre for Values-based Practice, University of Oxford). It is planned that the CAIPE grant will include provision for funding of a Patient Voices workshop.

**\*\*£10,000 grant (remainder of surplus)** to support joint developments from our three organisations involving IPE and VBP. This includes the development of a series of national workshops. The first is planned for July 2017.

Income this year includes the following:

**Membership Fees:** Last year fees have remained the same

Individual member with JIPC £95/annum  
Corporate member with JIPC £1600/annum  
Corporate member without JIPC £850/annum  
Charitable status (without JIPC) £850/annum

Student member: £10 annually. Each student remains a member until the December after they have graduated and are then offered an incentive to stay a member at a reduced fee for one year of £50.  
Service user and carer membership £5 annually.

#### CAIPE Workshops and consultancy.

Zuyd Workshop	£2,500
Pilgrim Projects HENE Consultancy	£840
Imperial College Workshops	£2,347
Health Education England Consultancy	£20,000

CAIPE has prudently managed its finances over the past few years and been able to support new membership initiatives. In the coming year work must continue to ensure a regular source of income during the continuing funding difficulties and economic uncertainties.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

### **The Report of the Trustees**

Continued....

#### **Risk Assessment**

Usually the majority of CAIPE's annual income is generated from membership fees. In this financial year there was a drop in fees from members from £44,877 in 2016 to £39,311 in 2017.

However the success of the ATBH Conference this year has meant that a grant of £25,000 has been made, from surpluses, to the ongoing work of CAIPE. In addition CAIPE was able to recover steering group administration, travel and subsistence costs of £6,957. Part of this related to unrecovered costs from 2014 and 2015, £3,934. The recovery of costs is shown as part of miscellaneous Income on the Statement of Financial Activities, page 16.

The bulk of the membership fees are from UK Higher Education Institutions, which may experience further income contraction during the next few years. In mitigation of a drop in income CAIPE holds unrestricted reserves of £88,500, which the trustees feel is satisfactory to provide for any future loss of income and invest in the future of IPE.

#### **Reserves and Investment Policy**

Reserves have been boosted this year by the ATBH Conference, see above, but the trustees have maintained their policy to hold, on deposit, a cash reserve of £10,000. This is held in a fixed term deposit account which matures on 10th November 2017 and earns interest at 1.35%.

The remaining reserves are to be reinvested in activities which will continue to promote the goals of interprofessional education, whilst at the same time, giving benefits to the membership.

The total Unrestricted Reserves available as at 31 March 2017 were £88,500, Note 10 to the Balance Sheet p 21.

Therefore, after maintaining the reserve of £10K, the Board during the 2017-18 operational year, will produce a strategy to reinvest the available £78,500 in line with the mission of the charity.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

For the year ended,

**31 March 2017**

### **Statement of Trustees Responsibilities**

The trustees listed on the Company Information page are directors for the purpose of company law and trustees for the purpose of charity law.

Charity Law and the Companies Act 2006 require the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity as at the end of the financial year and of the surplus or deficit of the charity.

In preparing those financial statements the Board is required to :-

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.
- state whether applicable accounting standards and statements of recommended practice have been followed , subject to any material departures disclosed and explained in the financial statements;

The trustees are responsible for keeping accounting records which disclose with reasonable accuracy at any time the financial position of the company and to enable them to ensure that the accounts comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the company and hence for taking reasonable steps for the prevention of fraud and other irregularities.

The trustees are also responsible for the contents of the trustees' report, and the responsibility of the examiner in relation to the trustees' report is limited to examining the report and ensuring that, on the face of the report, there are no inconsistencies with the figures disclosed in the financial statements.

So far as the trustees are aware, there is no material information, of which the company's examiners are unaware.

For and on behalf of the trustees:

Richard Gray  
**Chairman**

15th June 2017



**UK Centre for the Advancement of Interprofessional Education (CAIPE)  
Independent Examination**

**Independent Examiner's report to the trustees of CAIPE  
on the accounts of the Charity for the year ended 31 March 2017**

I report on the accounts of the company for the year ended 31 March 2017 which are set out on the pages 2-22 attached.

**Responsibilities and basis of report**

As the charity's trustees ( and also the directors of the company for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, I have examined your accounts as required under s145 of the Charities Act 2011 (the Act). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the Act.

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. that accounting records were not kept as required by section 386 of the Companies Act 2006; or
2. that the accounts do not accord with those records; or
3. that the accounts do not comply with the accounting requirements of section 396 of the Companies Act 2006 and the methods and principles of the 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; or
4. that there is further information needed for a proper understanding of the accounts.

**Independent examiner's statement**

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body. I can confirm that I am qualified to undertake the examination as I am a registered Fellow member of the Association of Chartered Certified Accountants and the Association of Charity Independent Examiners, both of which are listed bodies.

I have completed my examination and I have no concerns in respect of any of the matters 1. to 4. listed above and in connection with following the Directions of the Charity Commission I have found no matters that require drawing to your attention.

Mrs Sarah A Smith BSc. (Hons) FCCA FCIE  
8 Main Street  
Cold Overton Oakham

LEICS LE15 7QA 15th June 2017

## UK Centre for the Advancement of Interprofessional Education (CAIPE)

### Statement of Financial Activities

For the Financial Year:

1 April 2016 to 31 March 2017

	Unrestricted Funds 2017 £	Restricted Funds 2017 £	Total Funds 2017 £	Total Funds 2016 £
<b>Income from:</b>				
Members subscriptions	39,311	-	39,311	44,877
Donations	-	-	0	500
Grant	25,000	-	25,000	0
Sponsorship ATBH Conference 2016	-	-	0	21,500
Registration Fees ATBH Conference 2016	-	258,713	258,713	37,419
Workshops	27,147	-	27,147	10,642
Miscellaneous income	12,641	600	13,241	560
Bank Interest	8	-	8	112
Publication sales and royalties	335	-	335	362
<b>Total</b>	<b>104,442</b>	<b>259,313</b>	<b>363,755</b>	<b>115,972</b>
<b>Expenditure on:</b>				
<i>Raising funds</i>				
Website maintenance and advertising	16,114	-	16,114	8,745
	<u>16,114</u>	<u>0</u>	<u>16,114</u>	<u>8,745</u>
<i>Charitable activities</i>				
Scholarships and Awards :John Horder	1,220	-	1,220	0
Publications	9,029	-	9,029	19,271
Consultants and lecturers	3,568	-	3,568	9,725
Events and members meetings incl travel	4,110	-	4,110	6,387
ATBH: Venue and Event Management*	-	181,596	181,596	30,962
ATBH: Grants Awarded *	-	80,134	80,134	0
Sundries	496	-	496	86
	<u>18,423</u>	<u>261,730</u>	<u>280,153</u>	<u>66,431</u>
<i>Governance and Administration</i>				
Secretarial incl post and stationery	11,903	-	11,903	8,123
Board or steering group meetings and AGM	9,261	6,662	15,923	8,356
Accounting services	605	1,875	2,480	1,140
Independent examination	260	-	260	260
Bank charges	115	106	221	348
	<u>22,143</u>	<u>8,643</u>	<u>30,786</u>	<u>18,227</u>
<b>Total</b>	<b>56,680</b>	<b>270,373</b>	<b>327,053</b>	<b>93,403</b>
Net income/(expenditure)	<u><b>47,761</b></u>	<u><b>-11,060</b></u>	<u><b>36,701</b></u>	<u><b>22,569</b></u>
Transfers between funds *	3,000	-3,000	0	0
Total Funds Brought Forward	<u>37,739</u>	<u>34,060</u>	<u>71,799</u>	<u>49,230</u>
<b>Total Funds Carried Forward</b>	<b><u>88,500</u></b>	<b><u>20,000</u></b>	<b><u>108,500</u></b>	<b><u>71,799</u></b>

\* Note 5 to the accounts

## UK Centre for the Advancement of Interprofessional Education (CAIPE)

Balance Sheet

as at 31 March 2017

<i>The assets and liabilities of the charity:</i>	Notes	2016		2015	
		£	£	£	£
Fixed Assets					
Intangible assets			0		0
Total Fixed Assets			<u>0</u>		<u>0</u>
Current Assets					
Debtors		3,845		14,595	
Cash at bank and in hand		106,396		46,147	
Total Current Assets		<u>110,241</u>		<u>60,742</u>	
Creditors					
amounts due within one year		<u>1,741</u>		<u>11,512</u>	
Net Current assets			<u>108,500</u>		<u>49,230</u>
Total assets less current liabilities			108,500		49,230
<b>NET ASSETS</b>			<b><u>108,500</u></b>		<b><u>49,230</u></b>
<i>The funds of the charity:</i>					
Unrestricted income funds		<u>88,500</u>		<u>42,637</u>	
TOTAL UNRESTRICTED FUNDS			<u>88,500</u>		<u>42,637</u>
Restricted income funds		<u>20,000</u>		<u>6,593</u>	
TOTAL RESTRICTED FUNDS			<u>20,000</u>		<u>6,593</u>
<b>TOTAL CHARITY FUNDS</b>			<b><u>108,500</u></b>		<b><u>49,230</u></b>

For the year ending 31 March 2017 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit of its accounts for the year in question in accordance with section 476.

The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

Richard Gray

Chairman

Approved by the trustees on

15th June 2017

The notes on pages 19-22 form an integral part of these accounts

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

Notes to the Accounts

For the year ended, 31 March 2017

### **1 Accounting Policies**

#### *Basis of preparation of the accounts*

The financial statements have been prepared on a going concern basis, under the historical cost convention and in accordance with FRS 102 as modified by the Statement of Recommended Practice for Accounting and Reporting issued by the Charity Commissioners for England & Wales, effective Jan 2015. The accounts have been drawn up in accordance with the provisions of the Charities Act 2011 and the Companies Act 2006.

The Statement of Financial Activities, SOFA, contains the same information and financial result as the Profit and Loss Account, and takes its place.

The particular accounting policies adopted are set out below.

#### *Incoming Resources*

Incoming resources are accounted for on a receivable basis where the amount is quantifiable, where legal entitlement has been established and where the receipt of funds is probable. Income will be deferred where appropriate.

In accordance with the Statement of Recommended Practice for Accounting and Reporting (effective Jan 2015) issued by the Charity Commissioners for England & Wales grants received in advance and specified by the donor as relating to specific accounting periods or alternatively which are subject to conditions which are still to be met, and which are outside the control of the charity or where it is uncertain whether the conditions can or will be met, are deferred on an accruals basis to the period to which they relate. Such deferrals are shown in the notes to the accounts and the sums involved are shown as creditors in the accounts

#### *Investment Income*

Bank interest received is included on an actual receipts basis.

#### *Resources Expended*

Costs are recognised as soon as a legal obligation can be quantified and the trustees consider that crystallisation of the cost is probable.

The policy for including items within the relevant activity of categories of resources expended is that the direct costs of providing services to members; publications, training events and associated travel and other expenses are shown as being the costs of charitable activities.

All other costs are the indirect costs of running the charity and are shown as governance and management and administration. Specific statutory governance costs are shown separately from other administration costs.

## **UK Centre for the Advancement of Interprofessional Education (CAIPE)**

Notes to the Accounts (continued)  
For the year ended, 31 March 2017

### *Fixed assets and depreciation*

All tangible fixed assets, except freehold land and buildings, are stated at cost less depreciation. Freehold land and buildings, where held, are stated at a valuation arrived at by a professionally qualified firm of valuers, who valued the assets on the basis of open market value in current use.

Items of less than £500 are not capitalised.

Depreciation has been provided at the following rates in order to write off the assets (less their expected residual value ) over their estimated useful economic lives.

### *Taxation*

As a registered charity, the company is exempt from income and corporation tax to the extent that its income and gains are applicable to charitable purposes only. Value Added Tax is not recoverable by the company , and is therefore included in the relevant costs in the Statement of Financial Activities

### *Funds structure policy*

The charity maintains a general unrestricted fund which represents funds which are expendable at the discretion of the trustees in furtherance of the objects of the charity. Such funds may be held in order to finance both working capital and capital investment.

Restricted funds may be provided, from time to time, to the charity for particular purposes, and it is the policy of the board of trustees to carefully monitor the application of those funds in accordance with the restrictions placed upon them.

Designated funds are those unrestricted income funds applied by direction of the trustees for a specific purpose (s).

The Restricted Fund set up to account for income and expenditures relating to the ATBH Conference held in 2016, was maintained during the year. ATBH funds are maintained on a separate bank account.

## **2 Going Concern**

The charity is able to pay it's liabilities as they fall due, has no significant contingent liabilities or post balance sheet events that contradict this view and has sufficient reserves to operate for at least 12 months from the signature date of these accounts.

## **3 Winding up or dissolution of the charity**

If upon winding up or dissolution of the charity there remain any assets, after the satisfaction of all debts and liabilities, the assets represented by the accumulated fund shall be transferred to some other charitable body or bodies having similar objects to the charity.

**UK Centre for the Advancement of Interprofessional Education (CAIPE)**

Notes to the Accounts (continued)

For the year ended, 31 March 2017

	<b>2017</b>	<b>2016</b>
	<b>£</b>	<b>£</b>
<b>4 Surplus for the financial year:</b>		
This is stated after crediting:		
Revenue turnover from ordinary activities*	104,442	115,972
and after charging:		
Independent Examiners fees	260	260

\* Excludes Restricted Fund income of £259,313, one off ATBH Conference income.

	<b>2017</b>	<b>2016</b>
	<b>£</b>	<b>£</b>
<b>5 ATBH Conference</b>		
<i>Venue and Event Management</i>		
Venue costs	120,148	29700
Insurance	0	835
Event management fees and expenses	42,074	0
Conference programme and activities	3,949	0
Conference Administrator	11,943	427
Steering Committee subsistence and accomodation	3,482	0
	<b>181,596</b>	<b>30,962</b>
<i>Grants</i>		
CAIPE - General Fund	25,000	0
Oxford Brooks	25,000	0
Oxford University	25,000	0
ATBH Conference IX Steering Group	5,134	0
	<b>80,134</b>	<b>0</b>

An initial loan of £3,000 from the CAIPE general fund was repaid in the year and shown as a transfer on the SOFA.

	<b>2017</b>	<b>2016</b>
	<b>£</b>	<b>£</b>
<b>6 Investment Income</b>		
Bank deposit interest paid	8	112

	<b>2017</b>	<b>2016</b>
	<b>£</b>	<b>£</b>
<b>7 Creditors: amounts falling due within one year.</b>		
Trade creditors	1,741	11,512
	<b>1,741</b>	<b>11,512</b>

## UK Centre for the Advancement of Interprofessional Education (CAIPE)

Notes to the Accounts (continued)  
For the year ended, 31 March 2017

	2017	2016
<b>8 Profit and Loss Account</b>		
At 31 March 2016	71,799	49,230
Profit for the year	<u>36,701</u>	<u>22,569</u>
At 31 March 2017	<u><u>108,500</u></u>	<u><u>71,799</u></u>

### 9 Trustees remuneration and expenses.

There were facilitator fees paid to 2 trustees for the provision of workshops during the financial year. The trustees were acting in their professional capacities, not as trustees.

Elizabeth Howkins	630
Richard Pitt	<u>1,469</u>
	<u><u>2,099</u></u>

A total of £6,876 was paid to 6 trustees for travel and subsistence, being a refund of out of pocket expenses for attendance at meetings and events.

### 10 Restricted Funds

The trustees have established a Restricted fund for the provision of the 2016 ATBH Conference, which was held in September 2016. The balance on the fund of £20,000 is held for future grants in conjunction with the WCC and collaborative workshops in 2017. Movement on the fund is given on the SOFA, page 13 and at note 5 above.

Net Assets	Bank and debtors	Creditors	Total
Unrestricted Funds	90,241	1,741	88,500
ATBH Conference, Restricted Fund	20,000	0	20,000
Per Balance Sheet	<u><u>110,241</u></u>	<u><u>1,741</u></u>	<u><u>108,500</u></u>

### 11 Share capital limited by guarantee

The charity is incorporated under the Companies Act 2006 and is limited by guarantee, each member having undertaken to contribute such amounts not exceeding one pound as may be required in the event of the company being wound up whilst he or she is a member or within one year thereafter.

## UK Centre for the Advancement of Interprofessional Education (CAIPE)

Notes to the Accounts (continued)

For the year ended, 31 March 2017

### 12 2016 Statement of Financial Activities, showing the analysis of funds

	Unrestricted Funds	Restricted Funds	Total Funds
	2016	2016	2016
	£	£	£
<b>Income from:</b>			
<i>Incoming resources from generated funds</i>			
Members subscriptions	44,877	-	44,877
Donations	500	-	500
Sponsorship ATBH Conference 2016	-	21,500	21,500
Registration Fees ATBH Conference 2016	-	37,419	37,419
Workshops	10,642	-	10,642
Miscellaneous income	560	-	560
Bank Interest	112	-	112
Publication sales and royalties	362	-	362
<b>Total</b>	<b>57,053</b>	<b>58,919</b>	<b>115,972</b>
<b>Expenditure on:</b>			
<i>Raising funds</i>			
Website maintenance	8,745	-	8,745
	<b>8,745</b>	<b>0</b>	<b>8,745</b>
<i>Charitable activities</i>			
Scholarships and Awards :John Horder	-	-	0
Publications	19,271	-	19,271
Booklet: Introducing IPE	-	-	0
Consultants and lecturers	9,725	-	9,725
Events and members meetings incl travel	6,387	-	6,387
ATBH Conference 2016: Venue costs	-	29,700	29,700
ATBH Conference 2016: Insurance and Admin	-	1,262	1,262
Sundries	86	-	86
	<b>35,469</b>	<b>30,962</b>	<b>66,431</b>
<i>Governance and Administration</i>			
Secretarial incl post and stationery	8,123	-	8,123
Board meetings and AGM	8,356	-	8,356
Accounting services	735	405	1,140
Independent examination	260	-	260
Bank charges	264	85	349
	<b>17,738</b>	<b>490</b>	<b>18,228</b>
<b>Total</b>	<b>61,951</b>	<b>31,452</b>	<b>93,403</b>
<b>Net income/(expenditure)</b>	<b>-4,898</b>	<b>27,467</b>	<b>22,569</b>