



A year of progress

Annual Report & Financial Statements



Nothing about you

without you

SageAdvocacy.ie



About Sage Advocacy

The right to have your voice heard and to participate in making decisions that affect you is a fundamental principle in a democratic society. It is a principle simply stated as:

Nothing about you / without you

Many people face challenges to their independence as they grow older. This can be due to illness or disability, lack of family and community supports or an inability to access public services that meet their needs. Some people communicate differently and with difficulty and some people slowly lose their ability to make and communicate decisions as a condition, such as dementia, develops over time. Some are abused and exploited because of their vulnerability. Some have faced lifelong hardship as a result of institutional abuse in early life. Others feel disregarded or let down by healthcare services while some are harmed through adverse events or medical negligence.

In circumstances where people may be vulnerable, or have to depend on others, there is a need to ensure that their rights, freedoms and dignity are promoted and protected. Through support and advocacy the will and preference of a person can be heard and acted on; independent of family, service provider or systems interests.

Collaborate where possible / Challenge where necessary

Contents

4 Report of the Chair

6 Data in Detail

32 Complex Cases

39 Assisted Decision-Making Legislation

42 Service Extended to Survivors of Institutional Abuse

46 Erasmus Plus Completion

50 Renewal of Governance

56 Financial Statements



Report of the Chair

THE PAST year has been one of ongoing development and ever-increasing change in Sage Advocacy. There have been important and very positive changes at organisational and governance levels, significant changes in the legislative environment and a major move to extend the reach of our services.

The development of a new management structure and the beginning of a process of renewal at Board and committee level has been accomplished in large part because of the dedication of paid staff and voluntary workers focusing on 'what matters most'. I have been enormously supported in my new role as Chair of the Board by the wisdom and experience of my predecessor as Chair, Patricia Rickard-Clarke who, thankfully, remains as Vice-Chair. The slimming down of key governance committees and the building of collegiate structures of support and oversight for an extremely hard-working staff have been important achievements and have set the stage for the development of our second Statement of Strategy (2024 - 2027). They also better equip

Sage to meet the challenges of increasing compliance and regulation and of ensuring accountability for best use of public funds.

The level of work now being undertaken by Sage Advocacy is unprecedented and the complexity of that work is growing. In 2023 Sage recorded 5,928 cases of Information and Support ; an increase of 39% over the previous year. Casework, and the frequently complex work associated with it, increased by 27% to 1,975. A review of casework and recording quality during the year suggests that Sage is not yet recording the totality of work undertaken; primarily due to staff shortages in Information & Support. A particular source of pride are the more than 105 court reports provided by Sage Advocates arising from the commencement on April 26th of the long awaited Assisted decision Making (Capacity) Acts of 2015 and 2022. The quality and sophistication of this world-class legislation owes much to the enormous work over many decades of our former Chair, Patricia Rickard-Clarke. The demands that this legislation and our other work places on Sage now outpace our ability to meet them. It is clear that not only must Sage



strengthen its legal and advocacy staffing but it must also look for sources of funding other than our current main public funder, the HSE.

Arising from a decision of Government in July 2023 Sage Advocacy was asked by the Department of Education to extend its services to meet the support and advocacy needs of survivors of institutional abuse. Sage responded immediately to this request and I was proud to meet an enlarged national team when they gathered in Athlone on October 24th. The enlargement of our services to meet the needs of survivors will not be an easy process. Our experience to date suggests that outside of a number of survivor support groups many people who have experienced institutional abuse in their past are reluctant to discuss it and may have great difficulty engaging with public and private services and utilities as a result of their life's experiences. I have no doubt but that Sage will respond in a sensitive and measured way to the needs of survivors and, as always, it will seek to address and highlight the systemic issues that arise from our work. In this regard I am continually reminded of the famous phrase: 'To comfort the afflicted and afflict the comfortable'.

In the closing months of 2023 the Government finally moved to establish a Commission on Care for Older People which was promised in the Programme for Government in 2020. Having originally published a discussion document, Choice Matters, in October 2020 in anticipation of such a Commission, Sage, in November 2023, published the results of a Red C public opinion survey. This showed that older people want a more integrated

approach to support and care provision with greater opportunities for personalisation, a stronger role for the State and a more innovative and socially enterprising approach capable of developing the new models and approaches which are required post the Covid pandemic. The response of Sage to these developments is to encourage a range of interlinked developments that we are collectively calling a 'GAA for Care'.

I would like to thank my fellow trustees on the Board of Sage Advocacy for their support and counsel and their active participation in addressing the many and varied challenges facing our organisation. Their work is voluntary but no less professional for that. Collectively, they represent a strong body of experience and influence. Considerable thanks are also due to our

enormously hard-working staff and volunteer advocates who continue to abide by a core Sage principle of going 'the extra mile' on behalf of clients. They have exceeded themselves in all situations; whether in house or institutional visits, multi-disciplinary meetings, court appearances, public meetings or at EU project level.

Finally, I would like to thank our public funders, the HSE and the Dept of Education without whose support none of our work would be achievable. Special thanks are owed to those few people who donate funds to support our work but who wish to remain anonymous. Martin Luther King, Jr. expressed it well when he said: "Life's most persistent and urgent question is: What are you doing for others?"

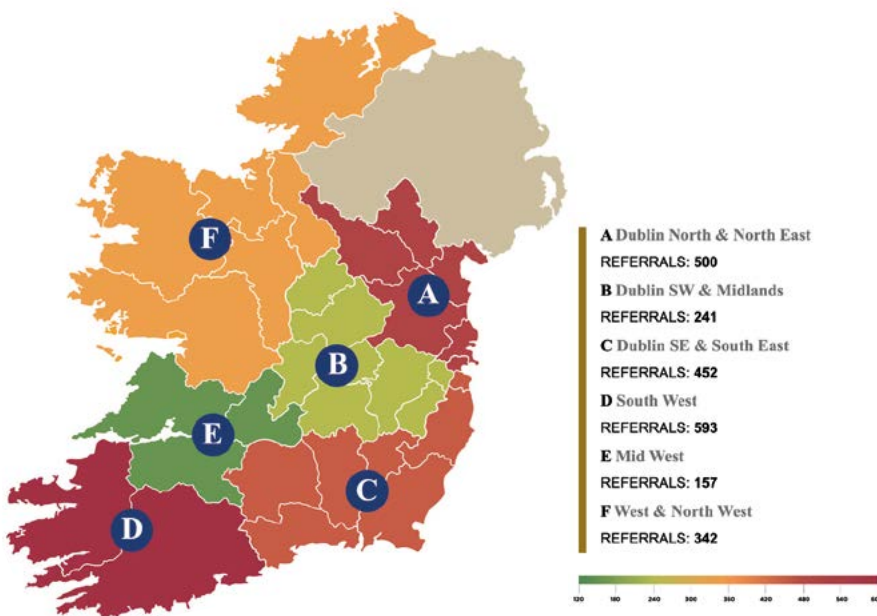
Mark Mellett

Sage will respond in a sensitive and measured way to the needs of survivors and, as always, it will seek to highlight and address the systemic issues that arise

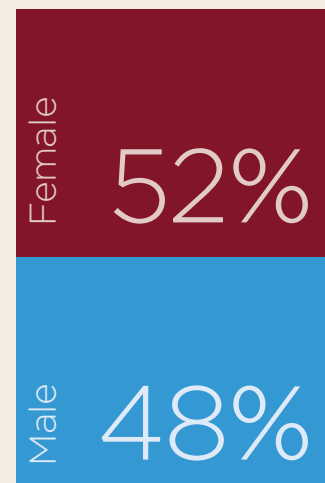
How Sage Advocacy spends its money...



Referrals by Region

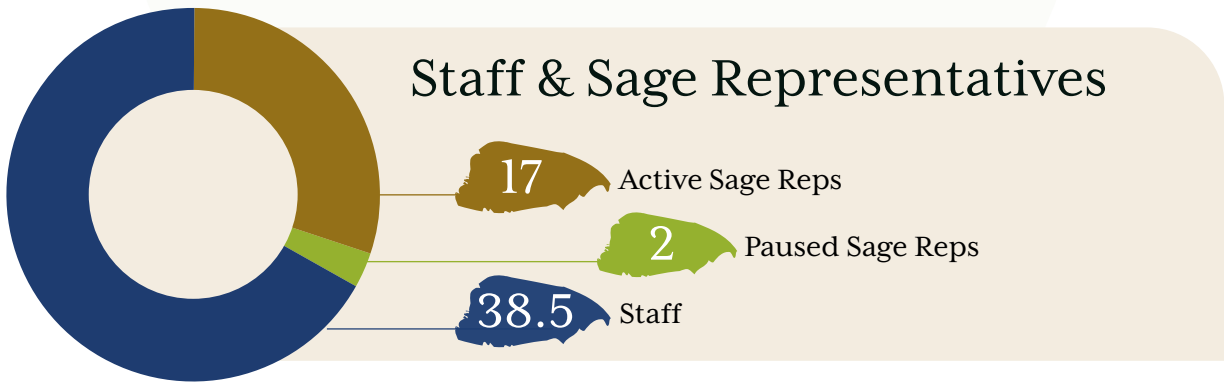


Client Gender profile

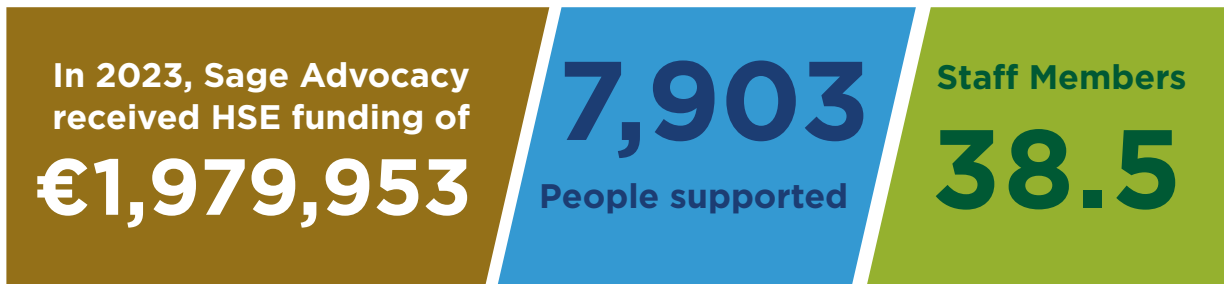


2023 AT A GLANCE

Sage Advocacy's Year In Review

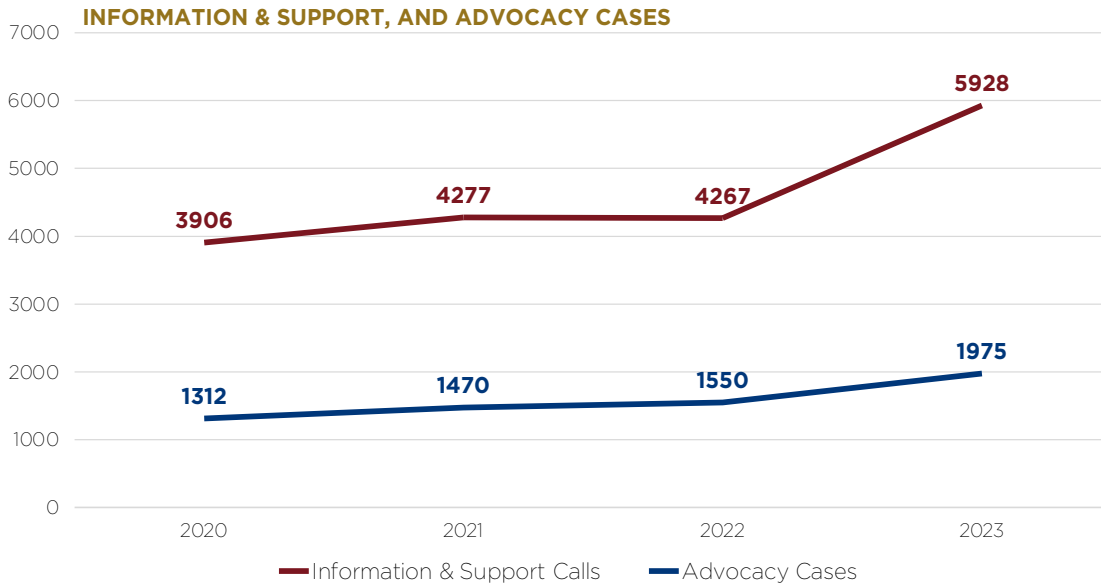


Providing value for money



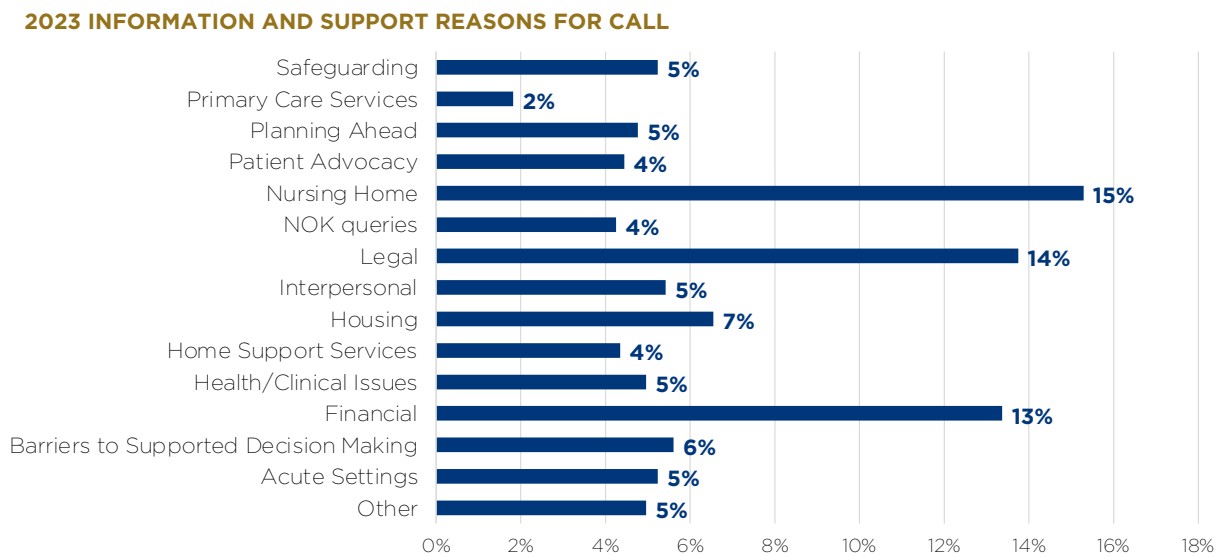
**Sage Advocacy
Data in Detail
2023**

Calls and Cases 2020 – 2023

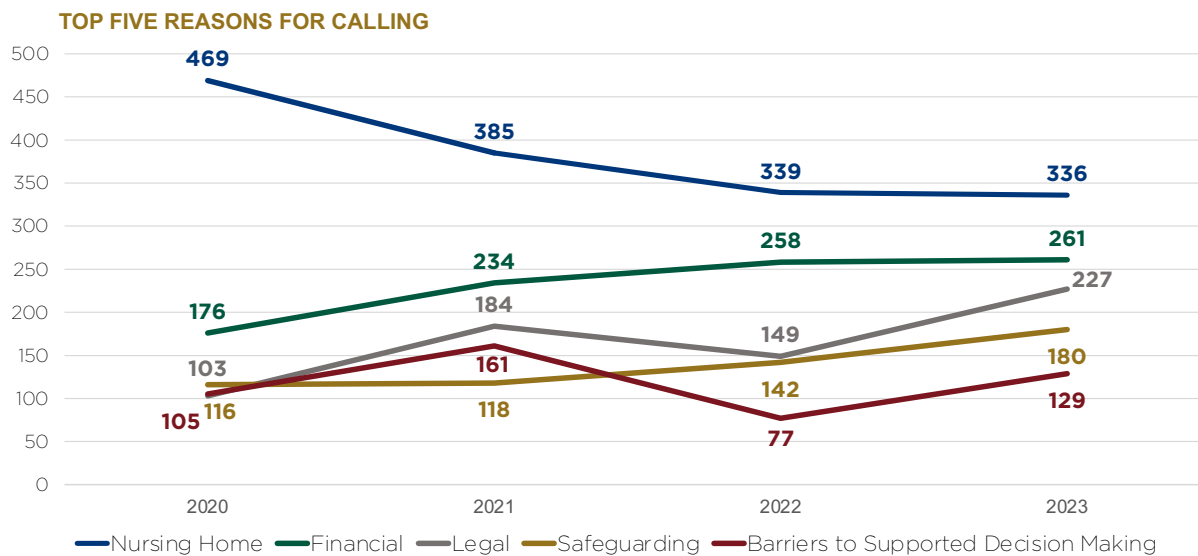


* The Annual Report for 2022 reported 3,027 calls logged by staff but the actual total number of calls received was 4,267.

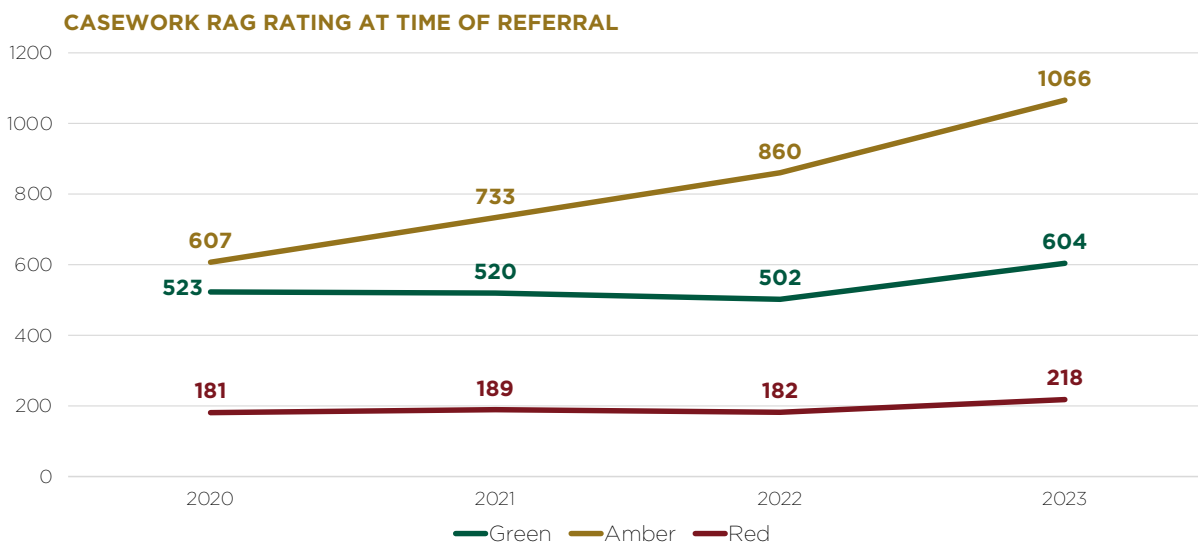
Reasons for Calling Sage Advocacy 2023



Reasons for Calling Sage Over Time

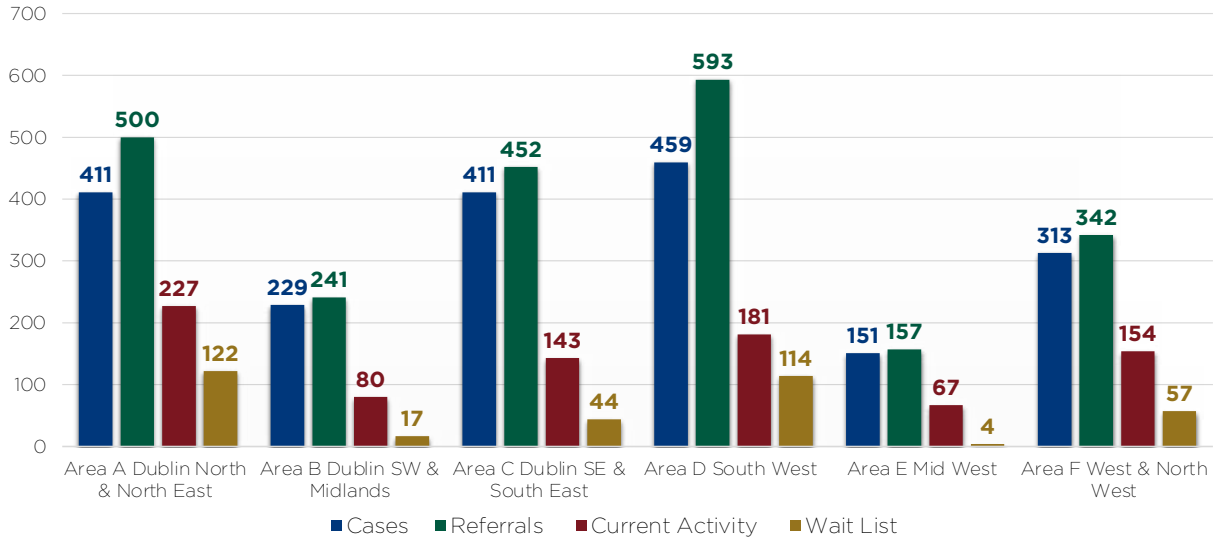


Casework Complexity



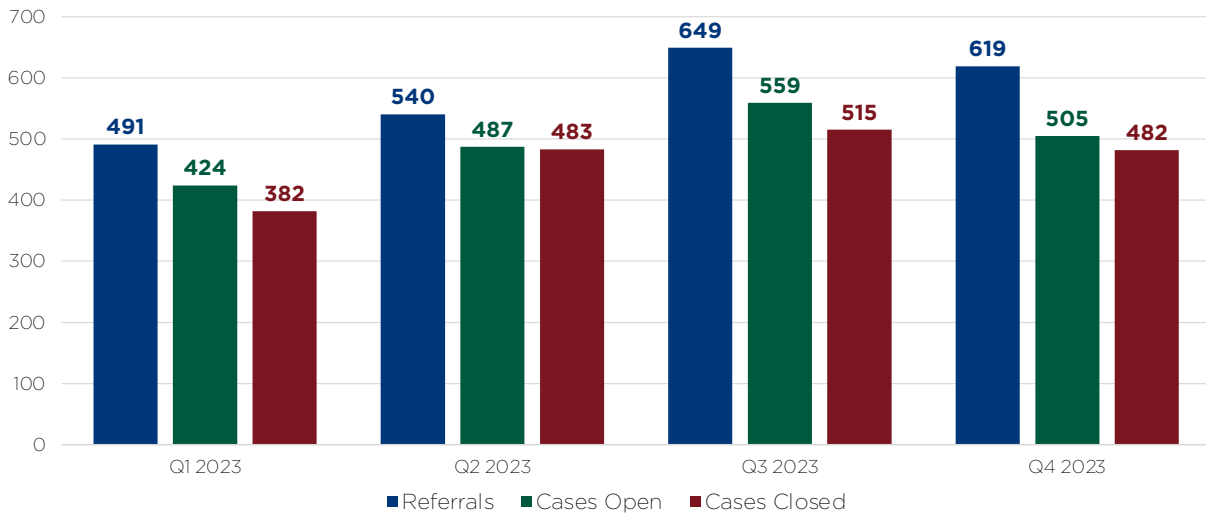
Activity by Health Region

CASES, REFERRALS, CURRENT ACTIVITY, WAIT LIST YEAR END

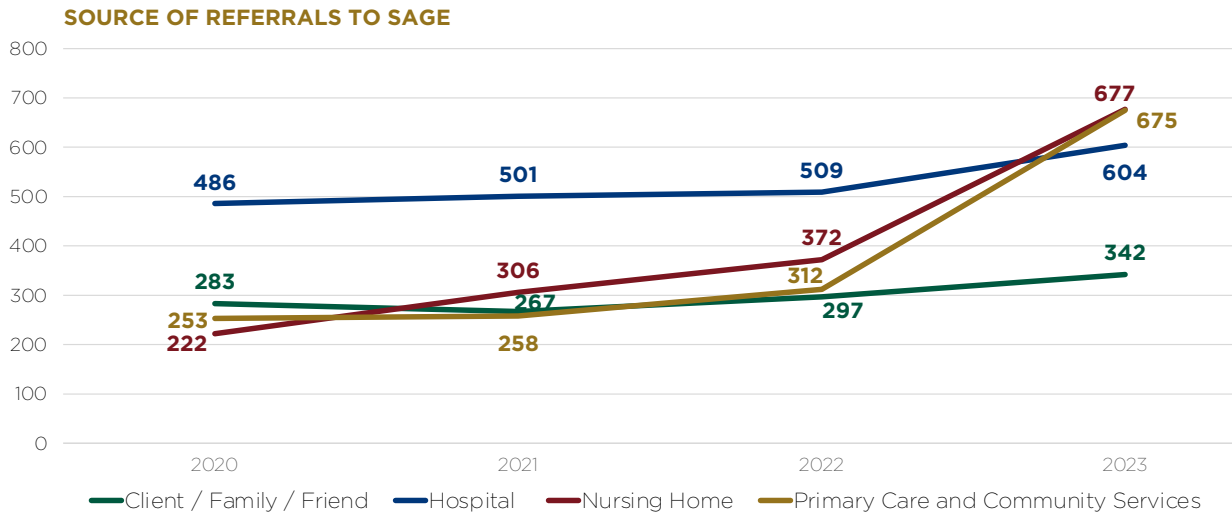


Activity by Quarter

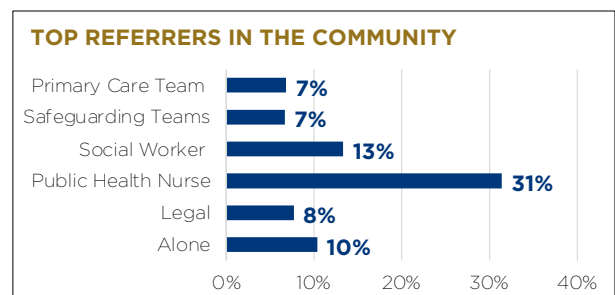
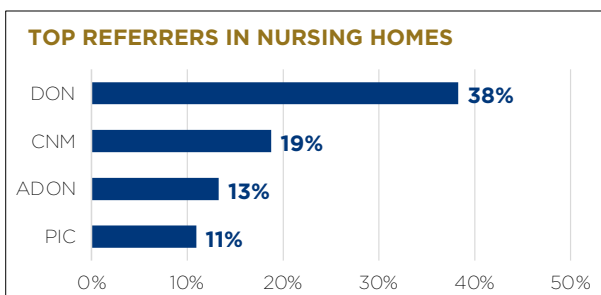
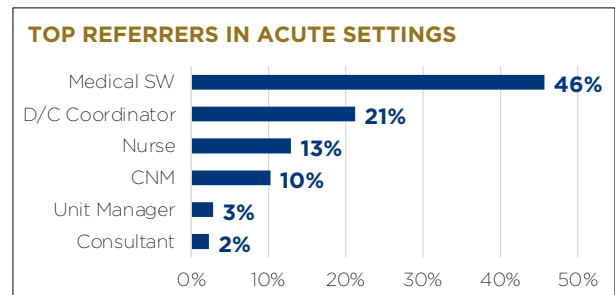
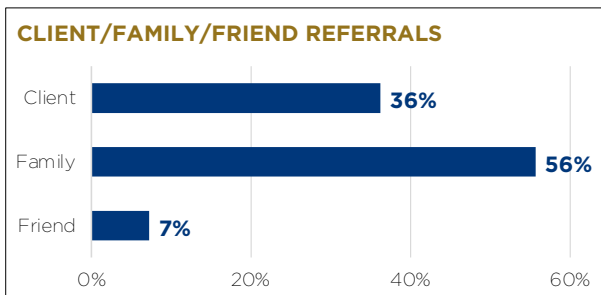
2023 REFERRALS, CASES OPENED, CASES CLOSED



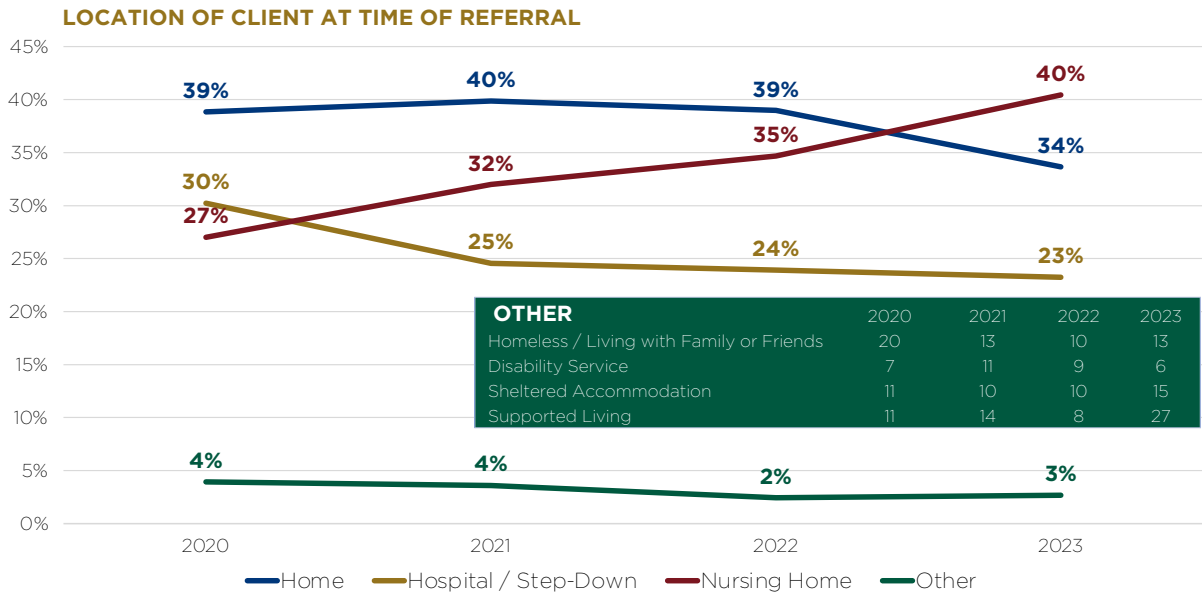
Source of Referrals



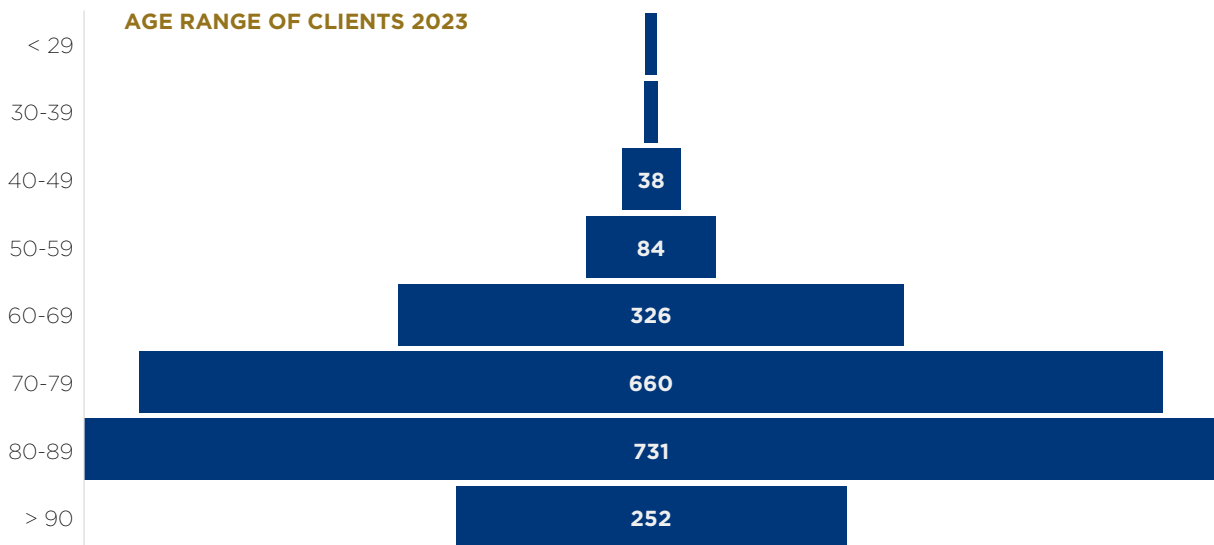
Sources of Referrals by Setting



Location at time of Referral

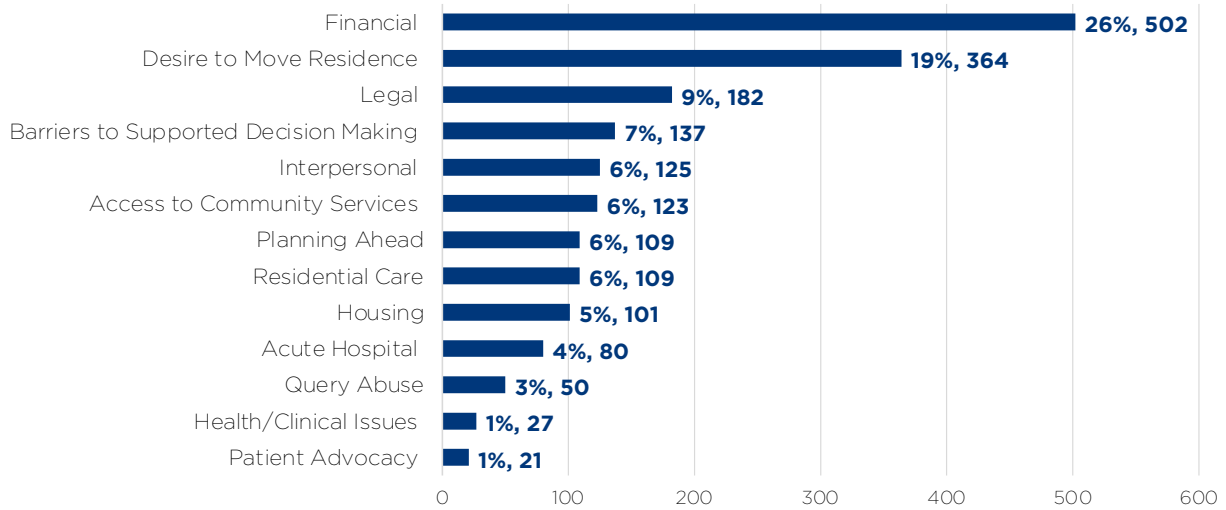


Age Range



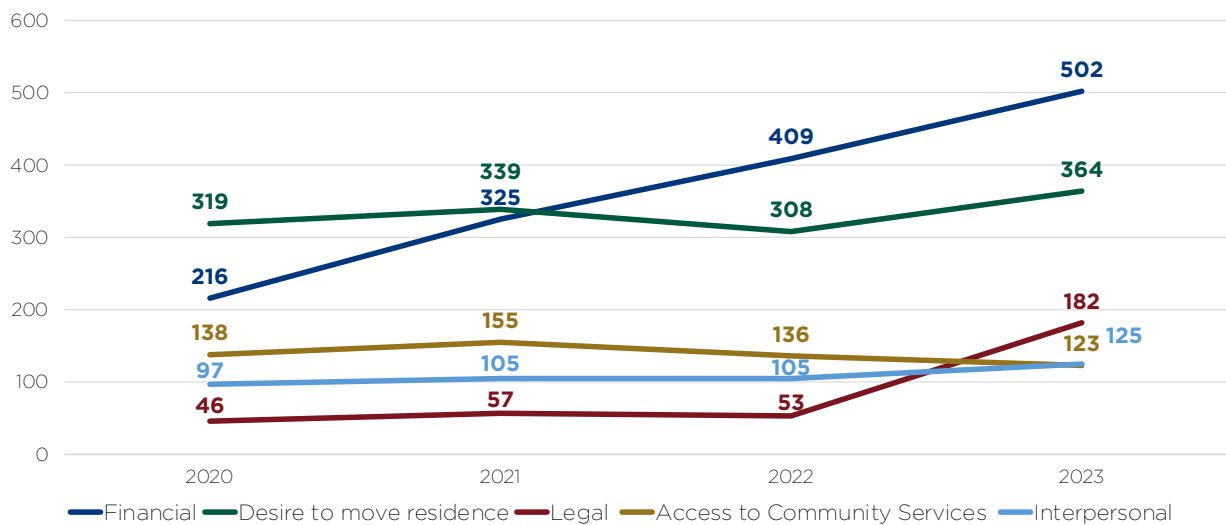
Primary Issues

PRIMARY ISSUES PRESENTED TO SAGE 2023

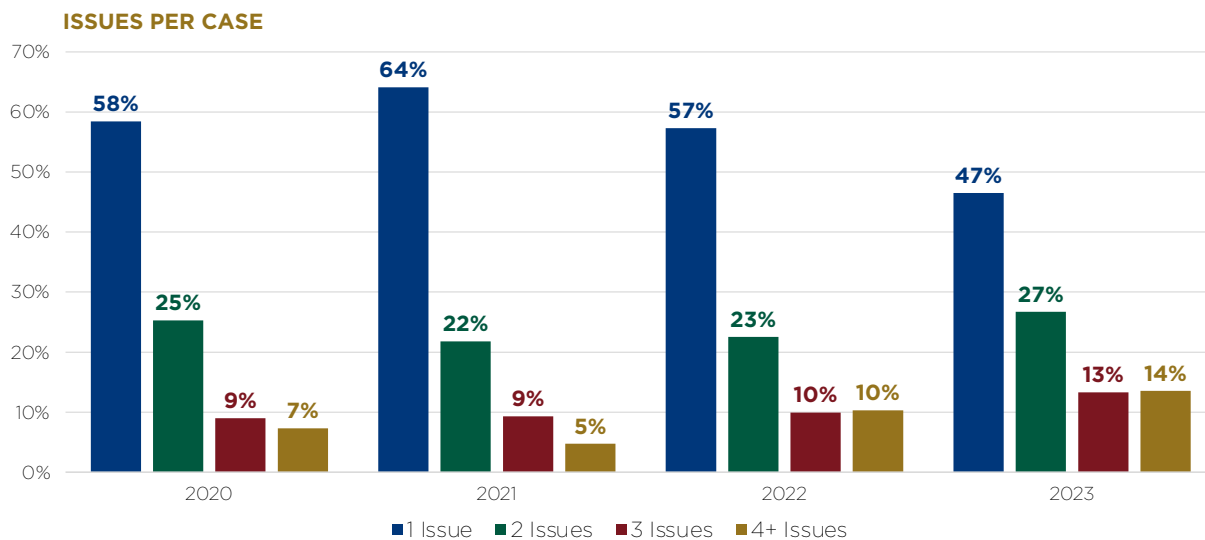


Top Issues

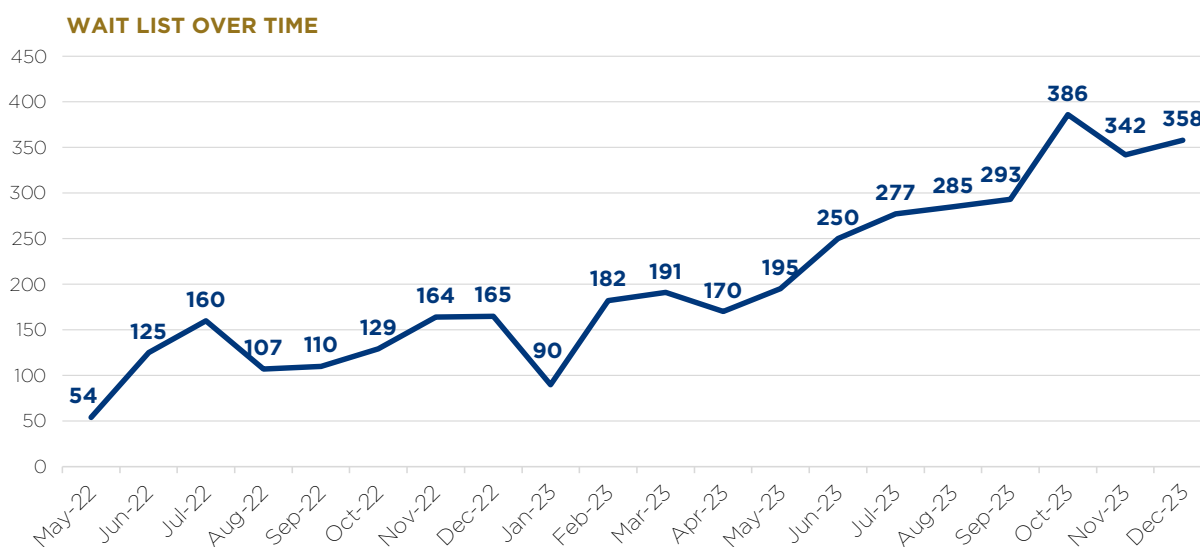
TOP 5 ISSUES PRESENTED TO SAGE



Number of Issues per Case

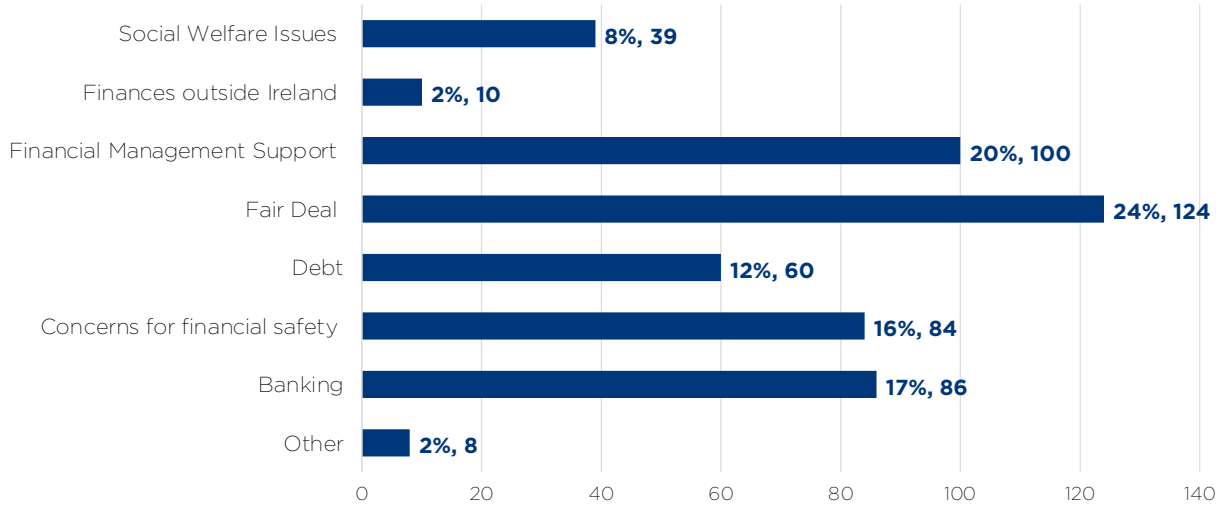


Wait List



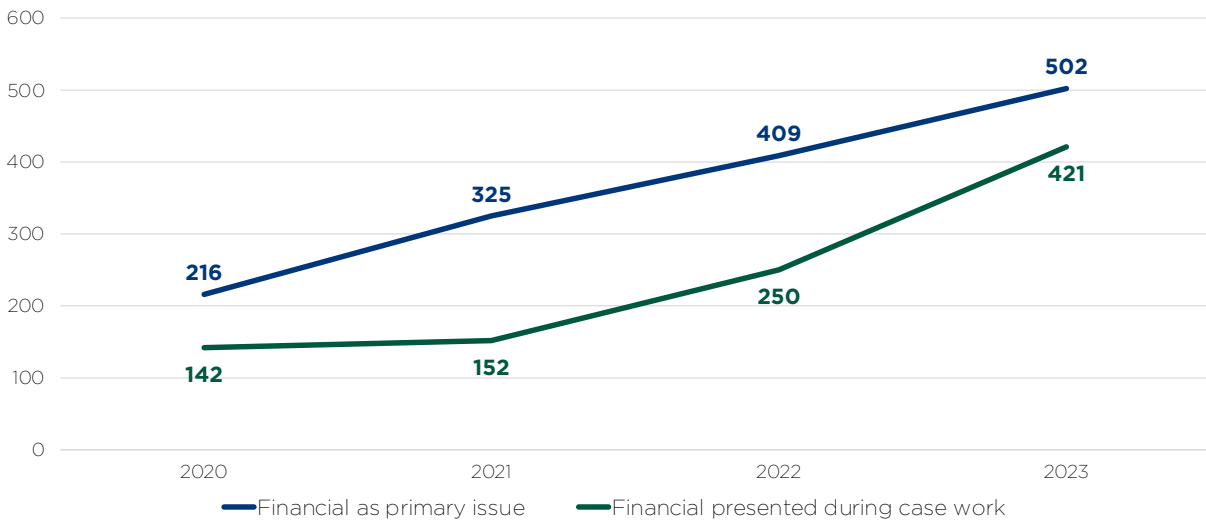
Financial Issues

FINANCIAL ISSUES PRESENTED TO SAGE 2023



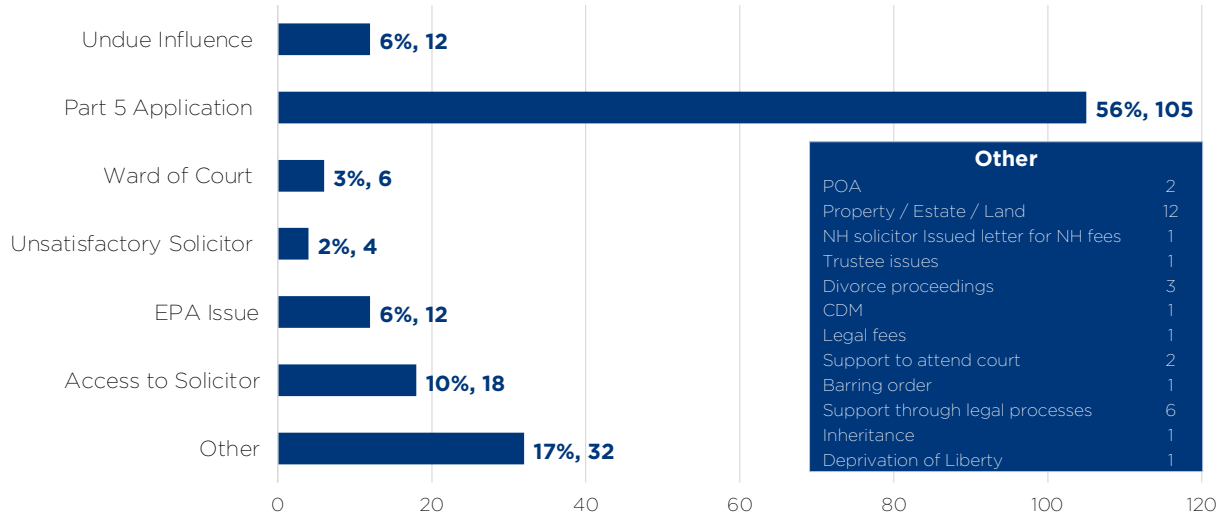
Other = Insurance issues (3), Credit Union Issues (5)

FINANCIAL ISSUES PRESENTED TO SAGE AT TIME OF REFERRAL AND DURING CASEWORK

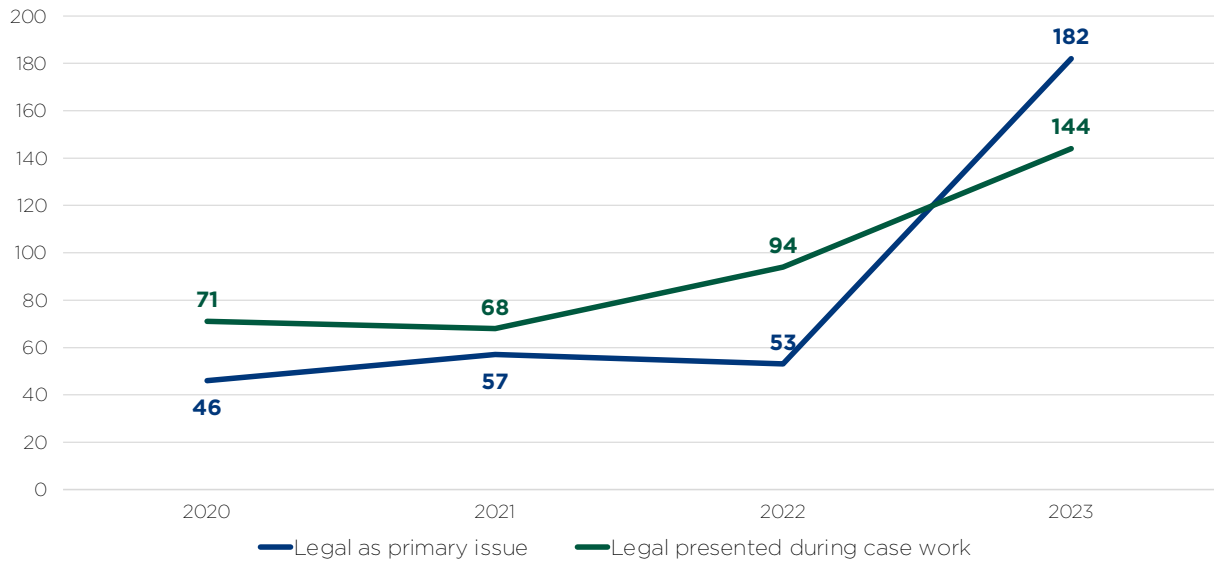


Legal Issues

LEGAL ISSUES PRESENTED TO SAGE 2023

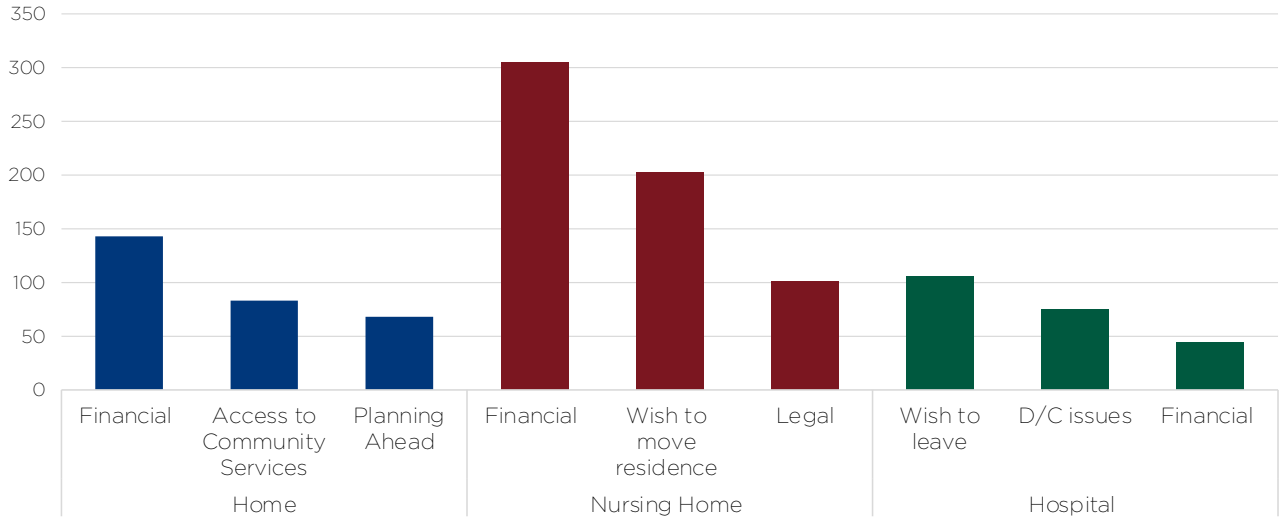


LEGAL ISSUES PRESENTED TO SAGE AT TIME OF REFERRAL AND DURING CASE WORK



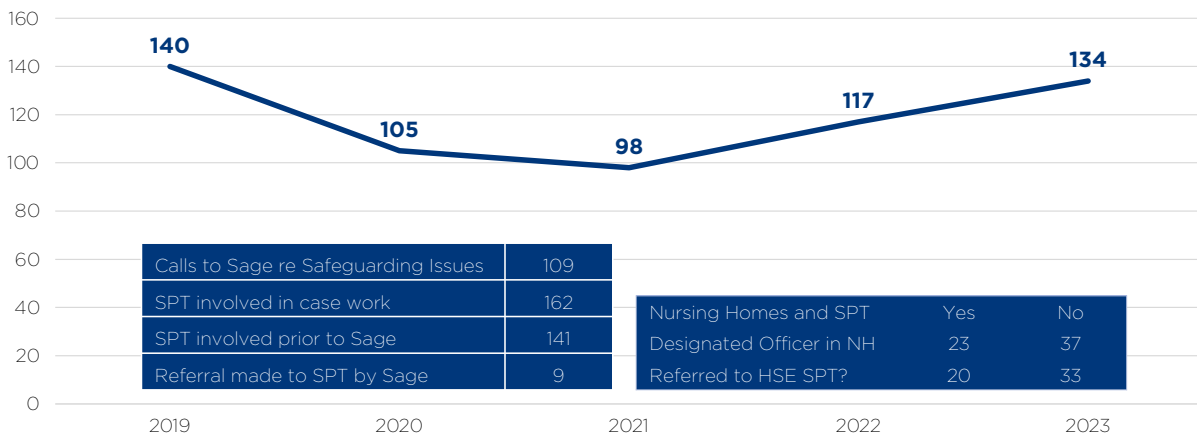
Primary Issues by Setting

TOP PRIMARY ISSUES BASED ON LOCATION 2023



Safeguarding Concerns

PRIMARY ISSUE - SAFEGUARDING CONCERNS



The above chart shows cases where the primary reason for the referral to Sage was because of a safeguarding concern. Sage received 109 calls to our national office regarding concerns of a safeguarding nature. The safeguarding team were involved in (and co-worked) 162 cases in 2023. Sage made 9 referrals to the HSE SPT teams during 2023. Of 60 cases in private nursing homes, 23 of these had designated offices in situ. Of 53 cases, 20 of these nursing homes referred on to the HSE SPT.

Length of Time Cases Are Open

- **1862** cases were closed in 2023
- The average length of time cases are open for is **five months**
- The longest case which was closed in 2023 was open for **4 years, 4 months, 22 days**. The primary issue related to issues that a resident had experienced in nursing home care. This was subsequently raised with the office of the Ombudsman.

LoT	No. of Cases	Highest Primary Issue
< 3 months	931	Financial
3-6 months	512	Financial
7-11 months	176	Financial
1-2 years	232	Desire to move residence
> 3 years	11	Patient Advocacy

What Influences Case Length

< 3 Months

- Requirement of forms 55A 55B 55E 55I to be completed today. 2+ hours to complete
- Referral directed by circuit court (received on 06/09/23) and need to complete report before court hearing on 13/10/23

3-6 months

- Family conflict; with objections raised in response to any efforts to return [Client] to her home.
- Several meetings with client and the professionals involved.

7-11 Months

- Initially a lot of input required with application and ascertaining where finances were.
- Client needed time to consider options and details of will; and support to understand and feel comfortable with the process.
- Many visits to client while at home; after admission to [Hospital]; and subsequently to [NH A]; and then to [NH B].

1-2 Years

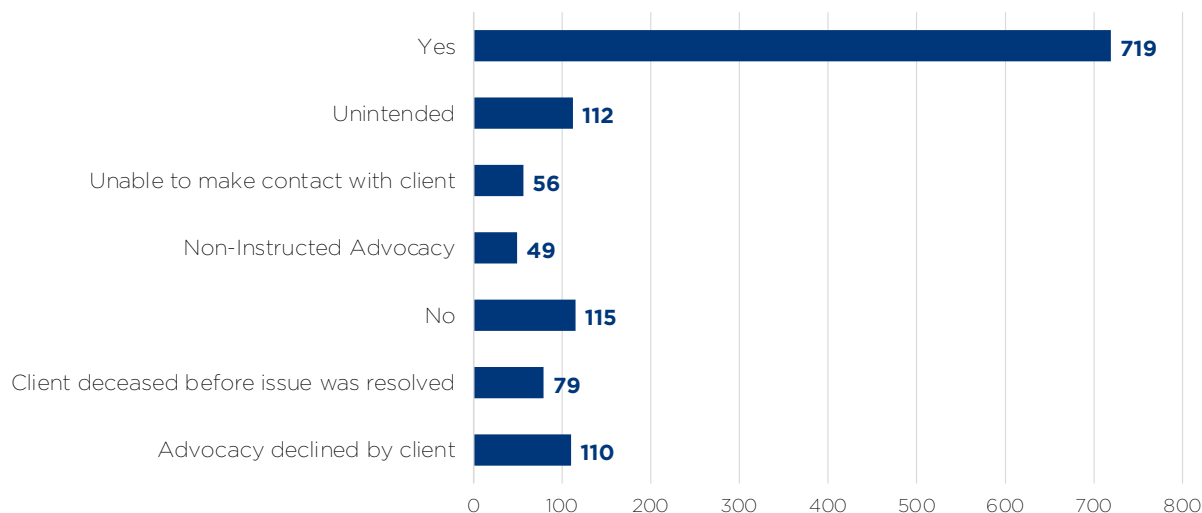
- Multiple services involved – SPT, AGS, DSP, [bank], Family, NH, NHSO, UK pensions office.
- Client's mental health condition – poor insight into condition of Korsakoff Dementia. Services not engaging with client. Lack of availability of accommodation suitable to client's condition.

> 3 Years

- Waiting for other services; lack of suitable accommodation available for people. Client was also turning 65 during case and new services needed to be applied to.
- Family difficult to engage with despite attempts to meet with them. Declined to provide information to assist client.

Outcomes

OUTCOMES - CLIENT'S WISHES MET



Outcomes – Yes

- Voice of RP heard in court proceedings.
- Client remained at home with supportive services in place.
- Client happy living in a new community setting with HCP and other supports.
- Think Ahead advance healthcare directive complete and located family grave plots.
- The client was supported to access his finances, obtain his pension, move bank accounts and pay NH arrears
- Client returned home from [Nursing Home] as per his wish.
- New account was opened and client's funds transferred from Ulster Bank.
- Moved to accommodation of choice.
- Client forced into signing Fair Deal by family member. NHSS made aware of the situation – and declined to accept application. Client's wish to remain living at home achieved
- Client's TCF extended. Pension agent removed and pension redirected to bank account and client supported to set up a direct debit.
- Client was supported with many issues, including paying for future funeral arrangements, planning ahead, linking in with other services, support with money management.
- Client was able to access solicitor to change his will as he wished.

Outcomes - No

- Trial at home unsuccessful
- The client's wish was not met due to the means assessment rules set out by the Local Authority Housing.
- Client wanted to move to another NH but neither of the ones she wanted had a place and both had long waiting lists. She is still on the list for both homes.
- On wait list for more home help hours at the weekend.
- Client's ultimate wish was to return home but this was not possible, due to her deteriorating health
- Client wished to return to homeless services but was made a Ward of Court.
- Client wished to go home but neither family nor the HSE would support this.
- Client wanted to move home but, due to her complex care needs, sufficient home help was not available.
- Client was not ready to make decision around leaving NH.
- Client was moved to another NH against her wishes.

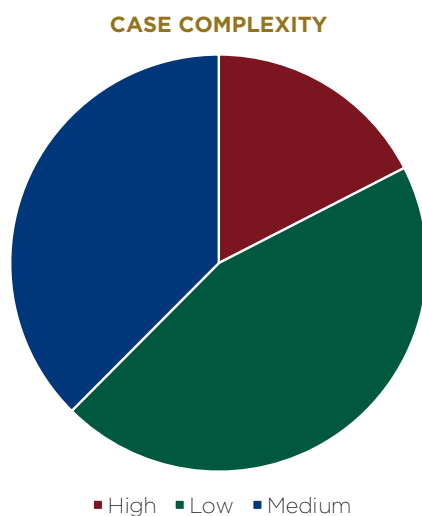
Unintended Outcomes

- Council allocated housing to the client, as per his wish. Advocacy was not required.
- Client was able to advocate for herself and issues were resolved following meetings with management.
- Client moved to LTC prior to engagement with Advocate. In follow-up, Client then advised that no support was required; the current LTC setting was acceptable.
- Client wanted to manage her own finances but after this had been explored, she reverted to state that she was happy for her son to manage her finances.
- Client was served a NTQ and MSW found him alternative long-term accommodation.
- Client's daughter (Referrer) supported client to return home.
- EPA registered and advocacy no longer required.
- EPA registered and client's debt cleared.
- Family provided support with NHSS, Advocacy not required.

Outcomes – Non-Instructed Advocacy

- NIA needed to safeguard pension and get NH bills paid.
- NH was liaising with client's daughter re payment/non-payment of client's fees. Situation resolved and client's pension now going direct to NH.
- [Client's] bill paid and money safeguarded.
- DMRO process and independent advocacy report complete. Voice of person represented in court. Independent DMRO granted to support with NH loan, finances and issues with son in the home.
- Follow up with NH to ensure it was following protocols and safeguarding client.
- Client supported through NIA to access finances to pay NH and pharmacy.
- Client safe in nursing home setting. At risk of physical abuse at home.

Complexity Factors



High

- Client's illness impacting speech; many challenges with documentation around housing application; difficulty in getting responses from family and Council.
- Client NIA; significant arrears; no family engagement; FD needed to be applied for.

Medium

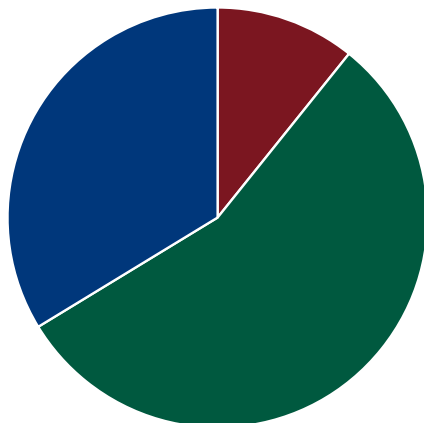
- Trying to access UK Pension, PPSN number, no medical card. Very tight time limit as TCF had already been implemented.
- The complexity related to communication difficulty. Client was unable to communicate, even with pictorial assistance, due to the nature of their disability.

Low

- Support and advice given to staff on how to respond to threatening behaviour and how to put plan in place.
- Over the phone support with client to access bank statements. Sage supported client, with written consent, to contact bank to obtain paper statements.

Time Demand

TIME DEMAND THROUGHOUT CASE



■ High ■ Low ■ Medium

High

- Despite the fact that there were some quiet times awaiting services to respond, time demand significantly increased once the responses arrived. The lack of other services available to help with finances and the practicalities of moving home, also caused significant high demand on advocacy service.
- Demand was high when the client was in the community, because of concerns for her safety. Collaborating with multiple other services also entailed high time demands: PHN; Dementia service; banks; nursing home support office; nursing home placement coordinator; nursing home; and family.

Medium

- Meeting with client and family; explaining how DMR works; completing court paperwork on behalf of client.
- Meetings with client and with nursing home; follow-up with pensions office, Primary Care team and hospital.

Low

Visit with client; supporting with open and honest discussions; challenging process taken by acute; providing information and support to staff around ADMCA and guiding principles.

Support over the phone, in person not required. Follow-up calls were approximately every two weeks. Low time demand.

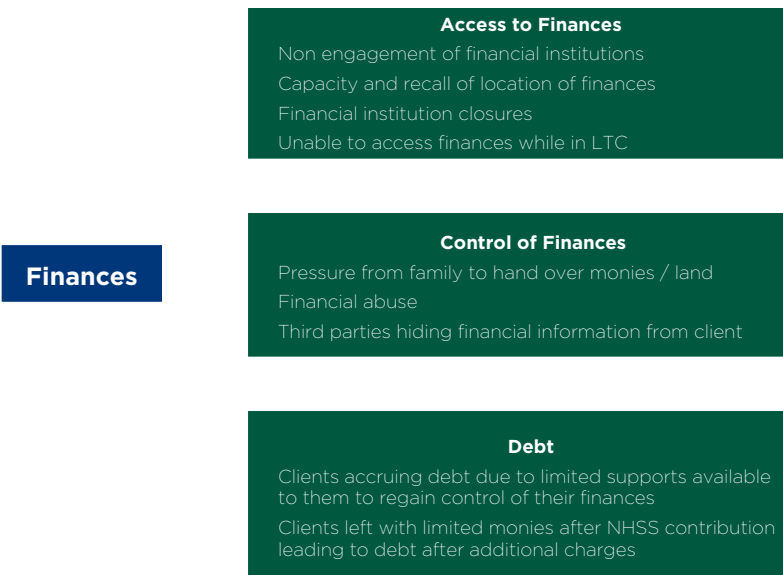
Impact of Advocacy

- Voice of RP brought to court proceedings.
- Without Sage, client may never have got Fair Deal application completed and may have had to return home, to live in what was reported to have been a volatile and abusive situation.
- Client stated that she felt more informed and understood the whole process of Fair Deal better after advocate explained it. She noted at visit that Sage was a fantastic service.
- Transparency among all parties and bringing an understanding of the presumption of capacity to the relevant personnel.
- This was positive for the client and MDT as it meant that an independent person heard the voice of client, and the client was happy with the placement options offered.
- Client felt supported by Sage intervention, after past experience of feeling unsupported and unheard by many other services.
- Supported client by listening to her worries and concerns, bringing any concerns to relevant individuals/agencies.
- Client was very appreciative of the opportunity to explore her options and life choices.
- Client was pleased with outcome and said she was glad to have had support to help her with her affairs.
- Positive impact, as social worker was grateful for advice and input and client said she was pleased to have someone listen to her view of what she wanted to do.
- Client had contacted several other services and there was no other service available to him. He had a deadline of a few days in which to respond to the Medical Council regarding a complaint. Client expressed his dissatisfaction at other services. Sage supported client with complaint response. Positive impact for client.

Systemic Issues

Transitional Care Funding				
Extensions required due to reliance of services on family members who will not engage.	TCF ending – no supports available to people to progress NHSS application.	Delays related to understanding of DMR process.	TCF applied for and approved against client's wishes.	Increase in debt in nursing homes due to no supports available to client after end of TCF.

Finances



Funding and Resources

Inadequate home care available to meet the needs of people who wish to remain at home	Home care only available for personal care - no person-centered approach to support older people who wish to remain at home	Lack of funding for complex health needs in the community	No suitable alternative options besides Nursing Homes
No rehab available	No access to primary care services for people in private nursing homes	No housing options available for older people	No access to legal aid
No transport for people to attend appointments and day services	Long wait lists for primary care services in the community	Lifetime loans and refusal of ancillary state support for principal residence	No pathways for people with specific conditions in the community e.g. KS and diabetes care

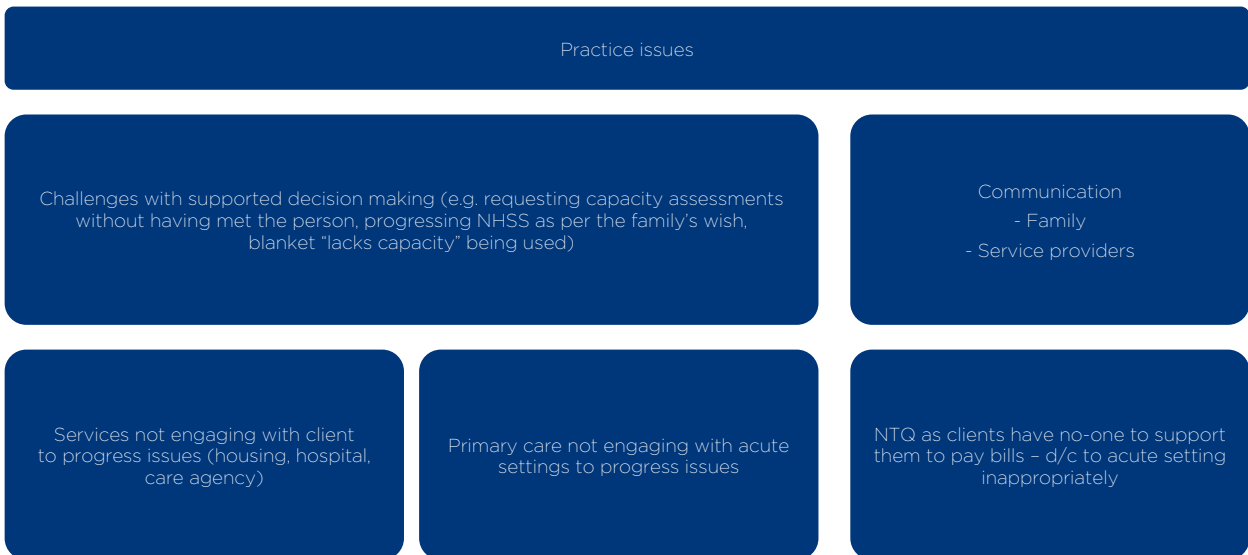
Deprivation of Liberty

Deprivation of Liberty	Over 40 cases were presented to Sage where a client was deprived of her/his liberty in 2023.
	Clients often wish to leave nursing home care, however no supports or resources can be obtained to support with same.
	Clients have been moved from acute settings to nursing homes against their wishes due to client being "unsafe" if they were to return home.
	Lengthy stay in acute settings have occurred for clients, against their wishes, due to inadequate resources available to either support them to return home, or to proceed with long-term care.
	During casework, families have been found to block the person's wish to return home. Instances of changing locks, not engaging with nursing homes, and proceeding with the Nursing Home Support Scheme against the person's wishes have been challenged by advocates.
	Under 65s placed in long-term care as there are no suitable options available.
	Family denying access to primary care services for older people in the community.
	Family stopping other family members from visiting client.

Issues in care



Practice Issues



ADM(C) Acts

During case work, Sage often finds that 'capacity' is still used as a blanket term, and the functional approach is often not used.

Callers to Sage have often not heard of the DSS, or the role it has in relation to decision support arrangements.

The process of DMRO is often misunderstood - people often assume it is the same as Wardship; entailing the power to take over all of people's decisions, as opposed to being issue-specific.

Callers to Sage often ask how to make a DMRO to move someone into a nursing home.

Services remain uncertain of their roles in supporting decision-making; and there is low awareness of the tools available under the ADM Acts for supporting people with decision-making.



Staff Activities

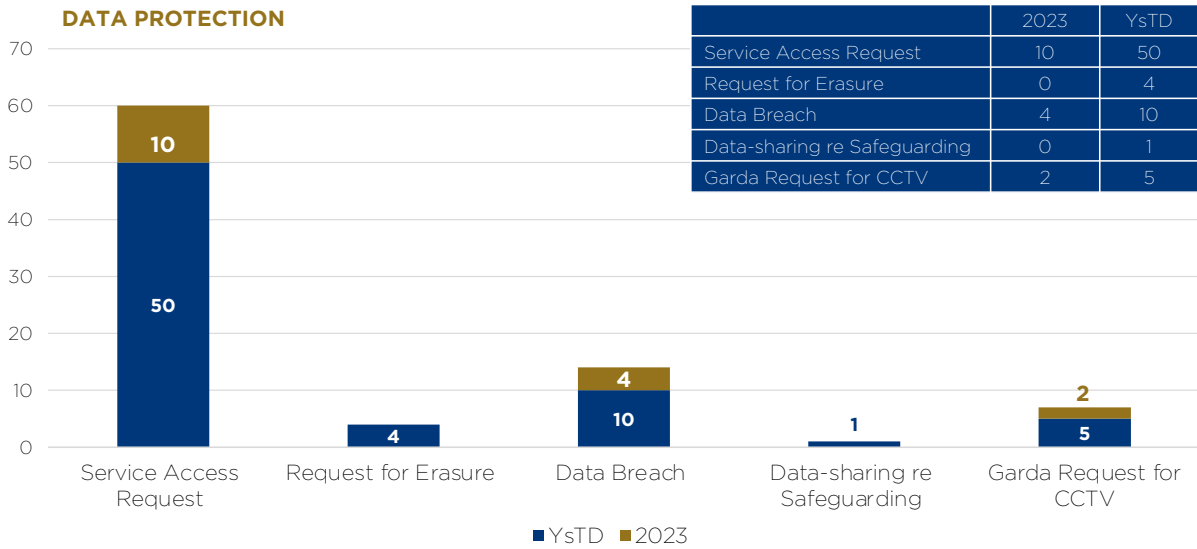
Mobile calls*

Mobiles			
Q2-Q4	Calls	Duration	Texts
Total	47925	2789:50:47	9973

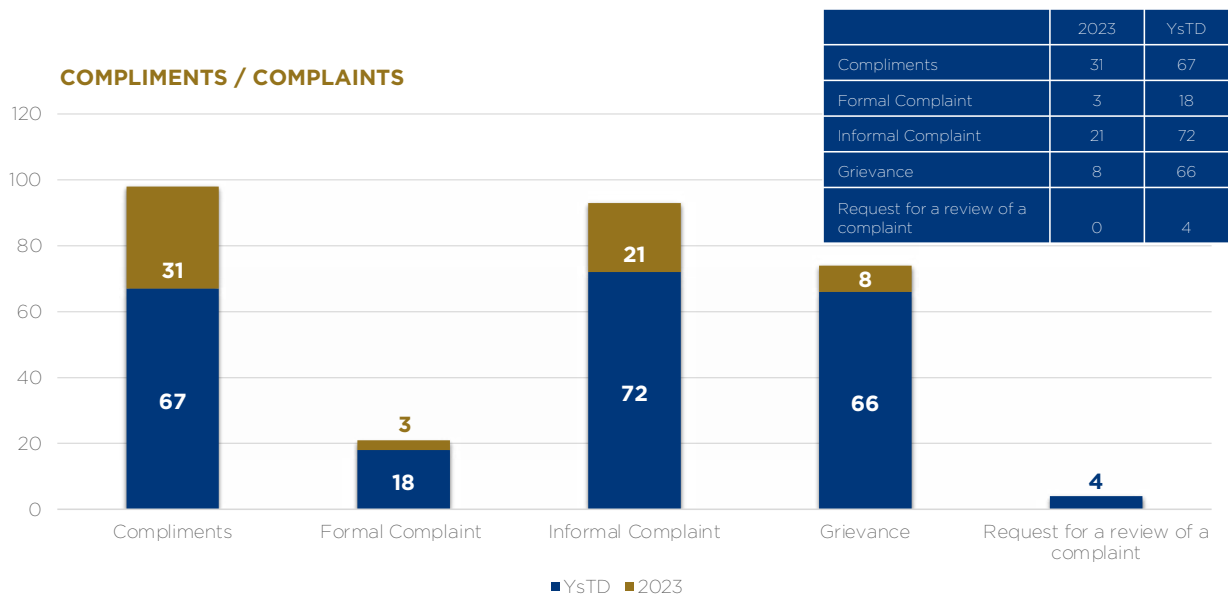
Emails received and sent

Sent	Received
66,069	167379

Data Protection



Compliments and Complaints

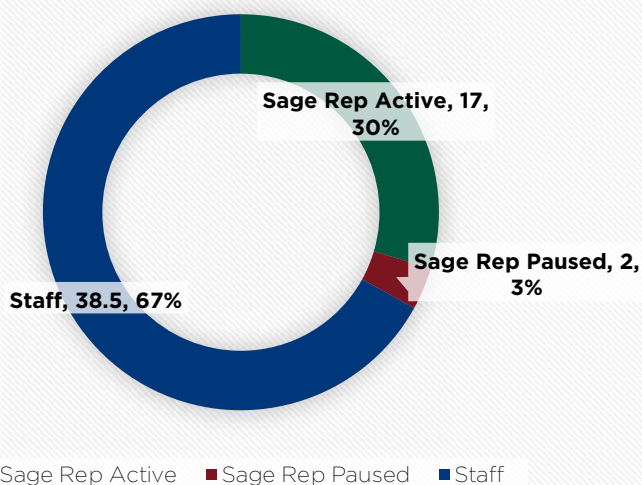


Lobbying

Jan-Apr23	- Funding of NH care, NH charges and establishment of Commission on Care as promised in Programme for Government.
Jan-Apr23	- To discuss issues and policy regarding long term support and care for older people.
Jan-Apr23	- Establishment on Commission on Care and statutory home support scheme
Jan-Apr23	- Discussion on possible new approaches to the nursing home sector
Jan-Apr23	- Preparing for the Commission on Care
Jan-Apr23	- The United Nations Open-ended Working Group on Ageing (OEWGA)
Jan-Apr23	- Oireachtas Mental Health Sub-Committee, Comprehensive Approach to Safeguarding Vulnerable Adults
May-Aug23	- Patient Safety (Notifiable Incidents and Open Disclosure Act 2023)
May-Aug23	- To understand the levels of funding provided to a range of charitable organisations working with older people; - To know if the Ministers for Health, Social Protection and Justice would support the establishment of a National Council on Advocacy to assist in developing common quality standards across providers of independent advocacy services; - To obtain information from the Minister for Health indicating clearly what responses he is planning to make to the report into the death of Mr. Ultan Meehan, a former resident of Kilbrew Nursing Home who died in 2020, and if he will ensure the extension of HSE Safeguarding & Protection Teams and clinical governance systems across all private nursing homes; - To know if the Minister for Health will request HIQA and the Decision Support Service to jointly develop a Code of Practice to protect the rights and interests of people entering nursing homes whose capacity to review, understand and make an informed decision to sign a contract for care is at issue.
Sept-Dec23	- To ask the Minister for Health if he will respond to concerns raised in respect of the 'Emily' case, and if he will make a statement on the matter.
	- To discuss with Minister of State issues relating to the care of Ultan Meehan, who had been a resident of Kilbrew NH, Co. Meath.
Sept-Dec23	- To request the involvement of the Minister for Older People in a seminar on Commission on Care

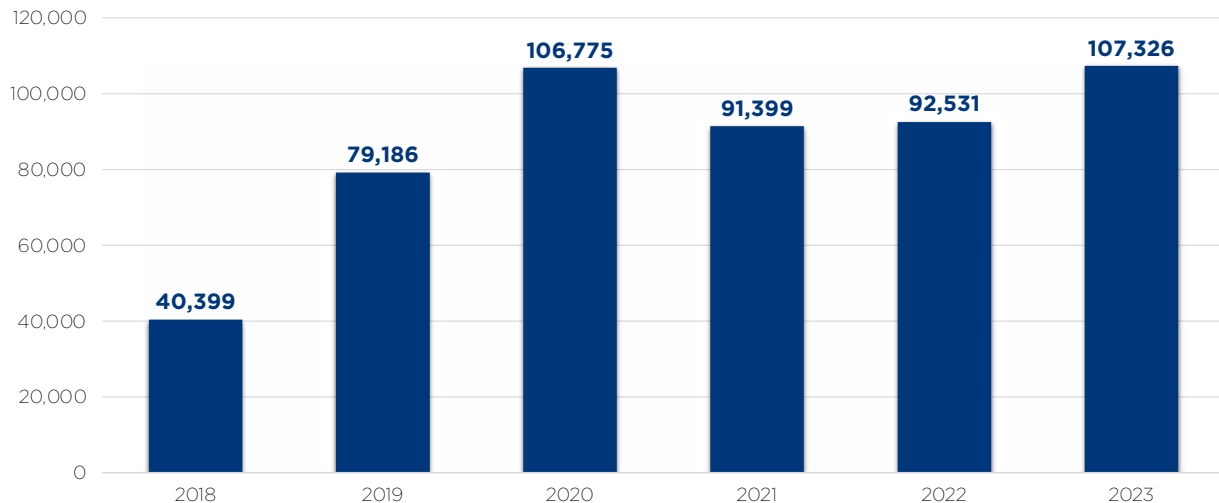
Staff & Volunteers

STAFF & SAGE REPRESENTATIVES 2023



Website Analytics

WEBSITE HITS



Events, Publications & Submissions

EVENTS

Assisted Decision Making (Capacity) Legislation - Challenges & Perspectives, on six dates from February – April 2023

Nursing Home Support Scheme Workshop, Carmelite Centre, 31 May 2023

PUBLICATIONS

Access To Justice By At Risk Adults, Published November 2023.

Managing Finances Supporting adults who may be vulnerable, A Discussion Document, Published March 2023.

SUBMISSIONS

Review of the Civil Legal Aid Scheme - Department of Justice, Submission made, February 2023.

Public Consultation on a Draft Policy for Patient Voice Partners in the Irish Health and Social Care Sector - Department of Health, Submission made, February 2023.

United Nations Call for inputs on violence against older persons - 2023 HRC Report, Submission made, March 2023

Review of the Consumer Protection Code, Central Bank of Ireland, Submission made, March 2023.

Draft Regulations for Providers of Home Support

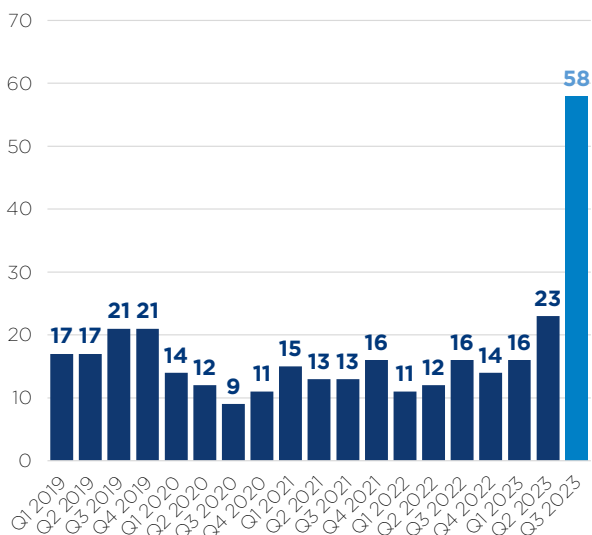
Services: An Overview of the Findings of the Department of Health's Public Consultation, Department of Health, Submission made, May 2023.

Consultation on Statement of Strategy 2023 – 2026, Department of Social Protection, Submission made, October 2023.

Cases with Legal Issues



LEGAL AS PRIMARY ISSUE OVER TIME



Stakeholder Engagement

Health Service Executive

(Patient & Public Participation. Assisted Decision-Making Transitional Oversight Group. Assisted Decision Making Implementation Steering Group. Nursing Home Support Scheme. Older People's Services. National Safeguarding Office. Safeguarding Committees. Emergency Department Taskforce. Under 65s in Nursing Homes Stakeholder Reference Group. Mental Health Engagement & Recovery - Sharing The Vision, Recommendation 65 Group. National Patient Safety Alerts Committee. Better Together Roadmap Implementation Working Group. ICPOP - subgroups in CHO1 & CHO8.)

Health Information and Quality Authority

(Ionising Radiation Steering Group. National Care Experience Advisory Group. Irish Hip Fracture Database Governance Committee.)

Department of Education

Department of Health
(Sláintecare RHA Advisory Group. Protection of Liberty Expert Advisory Group..)

Department of Justice
(Victims Forum.)

Department of Children, Equality, Disability, Integration and Youth

Legal Aid Board

Irish Human Rights and

Equality Commission

Decision Support Service

Policing Authority

An Garda Síochána

Alone

Age Friendly Counties (South Dublin Age Friendly Alliance.)

Irish Gerontological Society
(Executive Committee.)

Safeguarding Ireland (State Payments group. National Advisory Safeguarding Committee.)

Home Care Coalition

BAGSO - the German National Association of Senior Citizens' Organizations

Sage Advocacy
Complex Case Studies
2023



Declan's Story

DECLAN was referred to Sage Advocacy following a fall at home in which he sustained a head injury that had caused significant cognitive impairment. After acute hospital treatment, Declan had been discharged to a dementia specific unit in a nursing home in his home town - and he was not free to come and go as he wished.

Declan's sister Angela referred him to our service as she was concerned that her brother was not receiving neurological rehabilitation to support his recovery.

The Sage Advocate contacted the social worker who had been involved in Declan's case in the acute hospital to discuss details and to seek additional background information. The advocate was informed that the Multi-Disciplinary Team involved in Declan's hospital care had formed the view that he would not be able to manage independently or safely at home without significant additional supports. With community resources severely constrained at the time, amid the Covid-19 pandemic, the necessary supports had not

been available to support Declan's discharge home.

Angela liaised with the advocate to seek support in hearing her brother's will and preference regarding decisions to be made about his living situation. The Sage Advocate contacted the rehabilitation team in Declan's area and requested that he be assessed for rehabilitation as it was distressing for him to be in an unsuitable dementia unit that was not meeting his requirements. Following a series of emails and phone calls, the Sage Advocate was successful in securing a consultant and occupational therapy review with the aim of obtaining a place within a rehabilitation unit where Declan would receive the input he needed in order to achieve his ultimate aim of returning home. An occupational therapist from the community rehabilitation team was assigned to Declan and met him each week in the nursing home to make a start with rehabilitation while awaiting a place in the rehabilitation facility.

The advocate communicated frequently, seeking updates to see if a place had become available for Declan. After a few weeks, to Declan's immense disappointment, the occupational



Nicola.K.photos - stock.adobe.com

therapist was transferred to another, under-resourced, facility - leaving him without any therapeutic input to continue to work on his independence. The advocate contacted the manager in the rehabilitation facility and was told that Declan was no longer on their priority list as other clients had been deemed to be more urgently in need of rehabilitation.

Both the advocate and Declan's family were extremely dissatisfied with this outcome. The advocate contacted the local HSE Disability Case Manager to seek support. Declan's friends visited him in the nursing home and filled him in on the latest news, especially about his pet dog. Declan was always satisfied and content when receiving phone calls from Angela, who lived outside of the country. Declan often told the advocate how much he trusted Angela not only now but in the past, exemplifying the strong familial bond they shared.

At this point in Declan's journey, his other family members began visiting him. They too lived abroad and explained that they had been in contact with a rehabilitation centre where they lived that was happy to meet Declan and accept him for rehabilitation. This process was explained in detail to Declan who was relieved by the prospect of an opportunity that would assist in the transition to independence and

possibly home. Declan discussed it at length with Angela, before giving consent to his family members to obtain the documents required for him to travel abroad and attend this facility. The plan, as Declan understood it, was for him to live with his family member who was organising the rehabilitation and the appointments abroad.

Angela had concerns about the situation due to historical family conflict but she felt that if it was to lead to the best outcome for Declan, this opportunity could not be turned down.

The Sage Advocate provided Angela with contact details for safeguarding social work and advocacy support services in the country Declan was travelling to, in case of any concerns while he was there. The advocate spoke to Declan's family members and requested phone numbers in order to follow up on Declan's progress and to support with his transition back to Ireland if required.

A few weeks after Declan had left to attend the rehabilitation facility, the advocate telephoned him to check in with him but was unable to get through. The advocate phoned Declan's family member to request an update. The advocate was told that Declan was getting on well but was in bed and could not speak to them. Subsequently, the advocate received calls and

messages from Angela. She, too, had been unable to get through to family members to discuss Declan's progress. Neither had she been able to get through to Declan directly.

The advocate advised Angela to contact the Safeguarding and Protection team local to where Declan should be residing and advised her to also seek advocacy support for Declan from a local service. Angela did both and also contacted the Irish Consulate and the local police expressing her concerns regarding Declan's welfare. Angela also sought safeguarding support in Ireland but was told that while her brother was living in another jurisdiction the team was not in a position to act.

Angela later discovered that Declan was no longer living with the family member as had been planned and she had not been informed of his whereabouts. The Irish Consulate contacted Sage Advocacy and was satisfied to hear the background story from an independent advocate.

The Consulate was willing to support Angela in the search for Declan's whereabouts. The advocate received an email from the safeguarding social worker, informing them that that Declan's advocate would be in touch. The Sage Advocate contacted the advocacy service in the country Declan was now residing in and provided the advocate assigned to his case with relevant historic information regarding the case and situation, and expressed Angela's concerns. The advocate agreed to keep Sage updated.

The advocate in the country Declan was living in told the Sage Advocate she had discovered that Declan had experienced a decline in his mental health and had been placed in a nursing home. Declan had never attended the rehabilitation facility. As a result of the input and concerns raised from Angela and the Sage Advocacy advocate, Declan was moved to a supervised supportive living centre with access and services from various therapies such as physiotherapy and occupational therapy and this facility is recognised as one of the best rehabilitation centres in the area. The Sage Advocate discussed Angela's concerns about Declan's finances and the management of his accounts and the local advocate agreed to discuss this with Declan when it is appropriate.

Angela contacted the Sage Advocate to tell them that the social worker and advocate assigned to Declan's case had listened to all the relevant information provided by Sage Advocacy and a video call was organised between Angela and Declan.

Declan continues to thrive in his current environment and the services he is currently receiving would not be available locally if he were to return to Ireland.

Angela will continue to advocate for Declan regarding the safety of his finances and property with the support of the advocate now assigned to Declan who can visit him regularly.

Without the support and follow-through of the Sage advocate, this case would have had a very different conclusion. The detailed information provided by the advocate to the professionals abroad in collaboration with the

tremendous efforts from Angela helped place Declan in an environment with all the support he needs to begin his recovery journey and facilitated Declan in reconnecting with the people in his life who were always his support network.

Declan was not living with his family member as had been planned. His sister contacted the Irish Consulate and the local police to express concerns for his welfare



Mary's Story

MARY, who is in her mid-90s, had been living independently at home with her husband, with only minimal Home Help inputs. She became seriously ill and was brought to an acute hospital, where she remained for four months.

While Mary was there, her husband also became ill and was admitted to the same hospital. Sadly, he died of his illness and Mary was not yet well enough to attend the funeral.

Another month passed. It was deemed that Mary needed full-time care and she was transferred to a nursing home. The bill for Mary's care began to stack up – she refused to pay it. A referral was received by Sage Advocacy.

The advocate visited and Mary quietly asked why she should pay when she did not wish to be in the nursing home. She said it was lovely; staff were very caring; but she wanted to go home. She said she had not been consulted on the move – it had happened without her consent.

Mary spoke about how she had not been able to attend her husband's funeral and had not even visited his grave. She hadn't seen memorial cards or any of her post. The advocate arranged a discharge planning meeting between nursing home staff and family members. Mary said she did not wish to attend – she just wanted to go home.

A family member at the meeting said they wanted the bill paid before any discussion of Mary going home. Some family members said

they would support the move, others did not. Nursing home staff said they advised 24-hour care for Mary. They said that while she did not need high-level support, she needed someone with her when she walked since she was a 'falls risk'. This surprised the advocate as he had often observed her walking unaided around her room. The advocate said that Mary did not wish to pay to be somewhere she did not want to be.

The advocate and Mary discussed the falls risk when they next met. Mary said she could as easily fall in the nursing home and would still rather be at home. This showed the advocate that Mary had insight into the risk involved in going home and was willing to take it. She agreed to wear a wrist alarm in case of emergency. A home care package was applied for and the return home was discussed with the local public health nurse.

When the advocate contacted the nursing home a week later he was told that, due to a shortage in the area, it would be months before carers could be secured. The advocate visited Mary with this news and they agreed that the advocate would try to source private care in order to get Mary home without too much delay. Mary said that she was happy to pay for this.

However, on investigation, the advocate found that the HSE package had, in fact, been approved and carers had been sourced. The advocate organised a discharge date with the home help coordinator, public health nurse and family members – and Mary returned home. The advocate visited several times and, seven months on, Mary is very happily living at home.

Theresa's Story

AT THE time of Theresa's referral for advocacy, she had been living in a nursing home for two years, following a fall, and she wished to go home. She said that, despite being the sole owner of the property, she was being blocked from returning by her husband, who controlled her finances, including three pensions.

Theresa's pensions were being paid directly to her husband, yet he was not contributing to the nursing home fees – and so there were significant arrears. The advocate contacted Theresa's husband but got no response. She contacted Theresa's pension providers to request that payments be redirected or frozen. Since financial control was suspected, the advocate collaborated with the HSE Safeguarding and Protection Team (SPT) to secure a referral from the nursing home into their service.

Next, the advocate began planning around Theresa's wish to return home, applying and securing approval for a home care package; and making joint visits with HSE representatives to assess home condition and safety.

The advocate worked towards opening a bank account in Theresa's own name. Identification requirements and changes in marital status presented challenges, so the advocate contacted gardaí for an ML10 proof of identity form; made contact with Theresa's husband's solicitor; and, supported by Sage Advocacy's legal adviser, she engaged with the legal correspondence required.

The advocate worked with the nursing home and SPT on discharge planning and to seek functional assessment of capacity. She arranged a meeting between Theresa and the Director of Nursing to discuss the outstanding debt and her wish to return home.

As the case progressed, Theresa's prospects of getting home began to look more remote. The SPT closed its case and said it did not support a return home. Concerns had grown about the safety of any such move, due to factors including risks of emotional abuse and self-neglect. Multiple capacity assessments had concluded that Theresa lacked awareness of the risks.



Theresa remained in the nursing home for her care and safety, but her rights had been successfully safeguarded on several fronts as a result of advocacy. She had successfully regained control of her finances, with a personal bank account opened and two pensions redirected into it. She had been assisted in setting up weekly payments towards her care and the nursing home had been appointed as agent for her State pension. She was unwilling to pay the historic debt, so this remained as a sticking point.

Theresa's circle of support had been strengthened; and she had benefited from decision-making support in the process of seeking to move home.

The door had not been entirely closed on moving home, but Theresa's engagement on that process waned and the need for a solicitor to communicate with her husband in the house was an additional barrier. The nursing home's director of nursing remained ready to make contact with a solicitor if Theresa wished. Likewise, its financial department was at her disposal to conduct a Fair Deal review if needed.



James's Story

JAMES was in stepdown facility after leaving an acute hospital setting and was waiting on discharge home. He was cleared to go but refused, stating that his house was unfit to return to. Staff knew that James had lived alone in his house prior to admission so they were confused and concerned by his refusal.

A referral was sent to Sage Advocacy. The advocate visited James to see if he needed assistance. James explained that his house was "in an awful state" and he couldn't go back.

James said he was quite happy in the hospital and would agree to go to live in a nursing home but could not go back to his house. He was not in a position to pay privately for a nursing home and he did not qualify for access via Fair Deal since he was not in need of nursing care.

He agreed that the advocate could visit his house and take photos to bring back to him to discuss. James had the key to his house and gave it to the advocate.

The advocate visited and found that the roof was damaged leading to water ingress down the walls. Around three inches of water was pooled on the floor, and the chimney was leaking.

The entire house was water damaged, mouldy, damp and completely unfit for habitation. The advocate took pictures of the damage, returned to James in the hospital and showed him the pictures. They agreed that the advocate would contact builders for quotes to see if the Local Authority grant might assist in getting the house renovated. It was difficult to find someone for

the job. One builder said he could fix the roof and make the house fit to live in but it would cost more than the grant amount. Another said he 'would not go near' the job; that the house was dangerous and the chimney about to fall in.

After discussing with James, the advocate contacted the Local Authority and asked them to assess the house. When the engineer visited, he deemed the house unfit for habitation. This meant an application for the Housing Assistance Payment could be made. The advocate pursued this and the application was successful.

The advocate started to search for properties to rent, contacted local auctioneers and searched the papers and the Choice Based Lettings.

An apartment attached to a local house came up for rent and James was able to cover the rent between HAP and his income. With the help of the advocate, he succeeded in getting the apartment. He was delighted to have a home to go back to in the area he had lived all his life.

There was nothing in James's old house that was suitable to be transferred to the new apartment. An application was made by the advocate on James's behalf to St Vincent DePaul and they assisted with money to buy bedding, etc.

The advocate arranged a meeting between home support services, the local public health nurse and James, and a discharge plan was put in place.

James returned to live in the community, where he received three visits daily from home support and was able to access Meals on Wheels. The public health nurse visited twice a week to care for his health issues. James was very happy in his new home.

**Assisted Decision-Making
Legislation – Sage Advocacy
creating impact in court**



Bringing the voice of the person to the court under new ADM Act

BETWEEN June & September 2023, Sage Advocacy representatives attended as observers at 40 Circuit Court hearings of applications for a Decision Making Representative under the new Assisted Decision Making (Capacity) Acts, which came into force on April 26, 2023. In 30 of the observed cases, independent advocacy support was provided.

The number of Sage Advocacy cases with Legal as primary issue increased considerably in the past year, primarily with cases arising from attending the Circuit Court, but also as a result of mounting awareness about Sage Advocacy's intervention in such cases.

Most of the hearings attended by Sage Advocacy (on the invitation of the judge) took place in Dublin Circuit Court. There was also one attendance as observer in Trim Circuit Court and one to provide HSE-requested evidence in Cavan Circuit Court.

Referrals for advocacy arose on multiple occasions during the court hearings that Sage attended; then as word spread of the role for

advocacy in ensuring that the voice of the person is heard in such cases, referrals began to come through from courts around the country. Further referrals were received seeking support with preparing applications for the court.

Referrals requiring reports for the Court were primarily for new clients, but some were linked with current active cases or cases closed in the last few years.

Sage Advocacy noticed a number of recurring issues in applications coming before the Court in the months following commencement of the legislation:

- There were a lot of lay litigants – primarily relatives – presenting in Court, usually saying that either the HSE, the Nursing Home Support Scheme office or the Court Service had told them to fill out the application form and attend, expecting a similar approach to the Care Representative application process of old.
- This has meant that the person whose decisions are in question (known as the relevant person) has been absent from the hearing; and their voice in the matter has not been 'brought to the court', as the new law requires.

During the early days of implementation, it seemed that there was widespread ignorance of the requirement for the relevant person to attend or, if there was a good reason for absence, to have their voice brought to the hearing by an independent third party (advocate).

- There was no legal representation for the relevant person in any of the observed cases.
- Applications with unsuitable documentation were accepted in the Circuit Court.

In most of the observed cases there was no reference to any attempts made to explore less intrusive interventions, before making the application for DMR. It appears that applicants were never told that this was needed, even in the few cases where solicitors were involved to support the applicants at considerable costs.

New referrals requesting support at Court hearing stage posed challenges for Sage Advocacy, since the timespan for interaction between advocate and client and submission of the related report was being dictated by adjournment dates, with limited regard to advocates' availability and the waiting lists in operation.

Typically, the advocacy intervention in an application for a Decision Making Representative (DMR) consists of:

- Preliminary conversations and/or correspondence to ascertain the relevant issues and arrange to meet the relevant person and, where required, other individuals (relative, professionals, etc).
- Meetings and follow-up conversations and correspondence with the relevant person & others as appropriate (two to five visits, with one advocate and occasionally two)
- Review of documentation and additional information from different sources
- Addressing queries from applicants and legal professionals linked with the cases
- Sharing informational resources assisting the progression of the case as required
- Writing the report to the Court (reviewed internally by three staff)
- Attending Circuit Court to give evidence if required.

In situations where the relevant person is not able to attend the Circuit Court hearing either in

person or via video link, the advocate plays a crucial role in bringing the voice of the relevant person to the Court hearing, independent of family, service providers or systems interests. These cases require considerable time and resources to achieve meaningful engagement, provide comprehensive reports to the Court and where appropriate, provide support to the relevant person through less intrusive interventions than DMR.

A range of outcomes were achieved through independent advocacy interventions:

- DMR Orders issued as per the request outlined in the application;
- DMR Orders issued for specific interventions only, in situations where other matters outlined in the DMR application were solved through lesser interventions;
- Alternative DMRs being considered, as the relevant person was not in agreement with the proposed representative;
- Findings that DMR Orders were not necessary at all.

It is important to note that throughout this process, clients were supported in many situations with other issues that were not initially flagged at the point of referral, but nevertheless represented significant achievements in promoting the will and preference of the relevant person and addressing rights infringements.

The experience of Sage Advocacy attending the Circuit Court produced significant learnings, which were shared with some relevant stakeholders. Future collaborative engagements in the form of a Consultative Forum would be most beneficial for addressing issues arising in DMR cases and enabling a shared responsibility in addressing the current shortcomings.

Independent advocacy support cannot be an afterthought and it should be sought well in advance of any application for DMR being prepared for the Circuit Court. Engaging at short notice creates unsustainable pressure not only on the advocacy service, but moreover it ill-serves the relevant person who remains "trapped in limbo" amid Court adjournments, if the advocacy intervention cannot be facilitated as expected.

Sage Advocacy Extends its Service to Survivors of Institutional Abuse



Background to the service

THE publication in 2009 of the Ryan Report exposed the abusive practices that were prevalent in State-run industrial schools and reformatories, from the 1920s to the 1990s. In 2015, the McAleese report presented the facts of State involvement with the Magdalene laundries. Following the publication of these reports, the State offered redress to survivors of institutional abuse (survivors) through the responsible State departments.

In the case of Industrial Schools and Reformatories and certain other residential institutions (orphanages, children's homes, special schools for children with a physical or intellectual disability, and hospitals for people with a physical or mental disability or mental illness in respect of which a public body had a regulatory or inspection function), the Department of Education was the responsible State Department and it administered redress payments via the Residential Institutes Redress Board, and subsequent supports via the agency known as Caranua.

The Department of Justice has administered redress payments to Survivors who spent time in Magdalene Laundries and, following the report of the Commission of Investigation into Mother and Baby Homes, which was completed in 2021, The Department of Children, Equality, Disability, Integration and Youth (DCEYDI) is in the process of establishing administration for future redress payments and supports to be made to Survivors who spent time in Mother and Baby Homes and County Homes.

In 2023, the Minister for Education introduced a Supports for Survivors of Institutional Abuse Bill (the 2023 Bill). Under the General Scheme of this bill, the Department of Education has provided funding for Sage Advocacy to act as an Independent Advocate for Survivors, resident within the State and in foreign jurisdictions, with no limits regarding age.

Considering the demographic of Survivors and our expertise, Sage has been identified as the most suitable agency to advocate on behalf of Survivors. While the Department of Education is administering supports to survivors of Industrial Schools and Reformatories, Sage Advocacy



will treat equally all Survivors, regardless of the type of institution that they have experienced, ensuring that they benefit from all supports, whether public, private or voluntary, which relate to their welfare.

The 2023 Bill was published by Minister for Education, Norma Foley, TD, in September 2023 and was referred to the Joint Oireachtas Committee on Education, Further and Higher Education, Research, Innovation and Sciences (JOC) for pre-legislative scrutiny. Having heard oral evidence from organisations representing survivors and from the Department of Education, on October 17 and 18, 2023, the JOC issued its Report on Pre-Legislative Scrutiny on December 15, 2023. The Bill has yet to be passed by the Houses of the Oireachtas.

The 2023 Bill will be the blueprint to safeguard survivors into the future, and is the legislative basis for the services that Sage Advocacy will provide to Survivors. The 2023 Bill's main purposes are to provide for:

1. Supports to Survivors of residential institutional abuse

2. The dissolution of the Residential Institutions Statutory Fund Board (Caranua)

3. The transfer of functions to the Minister of Education

In accordance with the 2023 Bill, eligible survivors are those who have previously availed of redress. This highlights a difficulty as many survivors did not come forward for redress for various reasons, such as protest against assistance from the State or Church, a misunderstanding that only victims of sexual abuse were eligible, or failure to make an application as a result of problems with reading and writing.

Sage Advocacy will try to scope the numbers of survivors who were not eligible for redress in order to highlight the issue for their equal treatment. Importantly for Sage advocates, the ineligibility of a survivor under the 2023 Bill will not prevent the provision of normal advocacy services to that survivor.

There is no legislation required for survivors to avail of the full range of supports normally



provided to older people and vulnerable adults by Sage Advocacy. The funding agreement between the Department of Education and Sage Advocacy is the basis for support to all survivors.

As regards supports to survivors, the Bill will offer health (Head 4 & 5) and education (Head 12 & 18) supports, and will amend Part 3 of Schedule 1 to Nursing Homes Support Scheme Act 2009 to ensure that awards made by the Residential Institutions Redress Board or similar court awards or settlements are not included in any financial assessment of means under that Act.

The supports are similar in nature to those provided by the DCEYDI Mother and Baby Home Institutions Payment Scheme and Magdalene Restorative Justice Ex Gratia Scheme. Survivors will only be eligible for support from one support scheme.

When engaging with survivors, it will be helpful to establish their full history of institutional/residential care and what, if any, redress they have previously received, in order to establish their eligibility for supports and relevant Government department.

Considering the demographic of survivors and our expertise, Sage Advocacy has been identified as the most suitable agency to advocate on behalf of survivors.

For example, a survivor who spent time in an industrial school and did not apply for redress will not be eligible for the health and education supports provided by the 2023 Bill. However, it may become apparent that the survivor also spent time in a mother and baby home, and can therefore apply for redress under the Mother and Baby Home Institutions Payment Scheme where they will be eligible for a lump sum payment and similar health and education supports to those

offered by the Department of Education 2023 Bill.

Sage Advocacy Submits Erasmus+ Project Outputs



A successful EU partnership

IN DECEMBER 2023, Sage Advocacy and its partners, Bagso (Germany), Tulip Foundation (Bulgaria) and Pro Senectute (Austria), finalised their project submission to Erasmus+, following a productive engagement that began in 2021 and encompassed international events for teaching, training and learning; position papers; multilingual resources and communications tools; and a Handbook for Good Practice developed by Dr Michael Browne

Director of Bulgaria's Tulip Foundation, Maria Petkova, reflected on the experience of participating in the project, supported by Erasmus+ and Léargas and entitled Safeguarding the Human Rights of Older People Through an Intergenerational Solidarity and Active Citizenship Approach, saying that the training events and bilateral talks with partners and other organisations had given her organisation much to think about and to take forward.

She said: "We have come across a few practices that we would like to possibly introduce in our country. Some preliminary conversations have taken place. The Tulip Foundation team is currently in discussions with a number of other Bulgarian organisations about

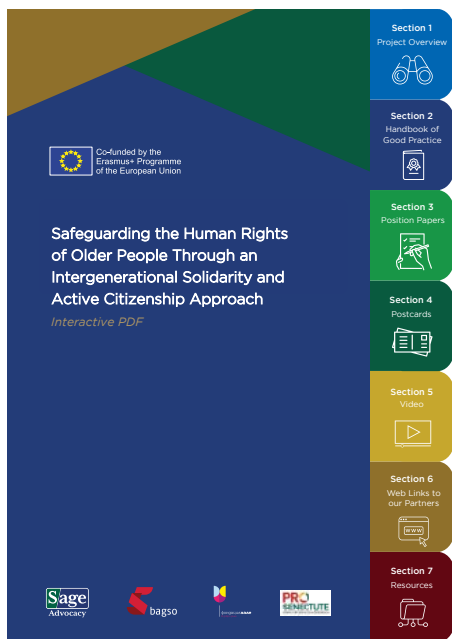
how we might initiate some further trainings and exchanges."

Ms Petkova added: "Together we learned about innovative policies and practices across European countries relating to implementing older persons' human and legal rights. A huge variety of different local and national policies and practices in the partners' countries were presented during the teaching, training and learning events. These have provoked questions and discussions.

"At the same time, new problematic issues and areas of life for older people were raised and discussed, such as the digital inclusion of older people and the limited opportunities to access digital / online trainings; their vulnerability to fake news; and difficult access / lack of services in rural areas."

Bibiana Savin, Sage Advocacy's Assistant CEO Case Management and Support, commended each of the partners for their contribution to the success of the project and said that the experience had been enriching and rewarding, with great scope for further work in partnership towards the betterment of older people's human rights across Europe.

She said: "The connections we have made; the best practice we have witnessed; and the knowledge and learning that has been generated



Clockwise from top left: The Erasmus+ Group pictured in Germany; a series of thematic postcards were produced in all partner languages; the Sage Advocacy Erasmus+ team of Helen Fitzgerald, Bibiana Savin and Mary Warren, pictured in Vienna, Austria; The cover of the project Interactive PDF

through the events, exchanges and outputs of this project have been invaluable and will have a lasting impact on our work. We are looking forward to the publication of our interactive PDF, which will be a valuable repository of the work completed, and which includes the Handbook of Good Practice, which in itself is an excellent achievement by Dr Michael Browne, and a practical resource that we hope might be put into use across Europe.”

In a foreword commending the Handbook, David Byrne SC, the Former Attorney General of Ireland and Former European Commissioner for Health and Consumer Protection, wrote: “The Handbook provides a comprehensive and detailed set of guidance across multiple areas which, based on a human rights perspective, outlines ways in which society should and can

treat its older members. It sets out a range of measures that can be taken by older people themselves, by communities, by public services and by Governments to give effect to a human rights approach.”

He added: “The concept of intergenerational solidarity in protecting the human and legal rights of older persons is a recurring and important theme in the Handbook. Safeguarding the human rights of older people is an intergenerational matter in terms of supporting people who require services, ensuring they retain connectedness with their communities and, very importantly, that adequate resources are available to provide high quality care for the relatively small proportion of older people in any country who need long-term care at any given time.”

SAFEGUARDING THE HUMAN RIGHTS OF OLDER PEOPLE

THROUGH AN

INTERGENERATIONAL SOLIDARITY AND ACTIVE CITIZENSHIP APPROACH

Hanover/Online
NOVEMBER
2021

PROJECT MEETING
This planning meeting included a discussion of key issues facing older people in the partner countries and how these can be addressed. Issues included: impact of Covid-19; perception of older people; care & support; nursing homes; financial issues; loneliness; and adult guardianship systems

Dublin
NOVEMBER
2022

CREATE KNOWLEDGE – STRENGTHEN PEOPLE IN OLD AGE
The event included launch of a position paper entitled: Intergenerational Solidarity: Selected Considerations. It declared that stronger intergenerational solidarity is vital to addressing ageism and needs to be harnessed to create acceptance across society of a shared responsibility for care provision in older age.

Sofia
JUNE
2023

HOW SELF-DETERMINATION AND AUTONOMY OF VULNERABLE OLDER PEOPLE CAN BE BETTER PROTECTED & ACTIVE CITIZENSHIP ENCOURAGED
Themes for discussion and learning include Human Rights in Old Age: Ensuring Self-Determination and Social Participation; and a guided visit of the exhibition #GermanyDigital will follow a session on Strengthening Social Cohesion Digitally

Dublin
SEPTEMBER
2023

THE 13TH GERMAN SENIOR CITIZENS' DAY

Virtual 3-day event with lectures, discussion panels & workshops streamed from Hanover. Erasmus+ partners from Austria, Bulgaria & Ireland presented experiences from their countries and contributed to the discussion on the theme "Protect the Human Rights of Older People, but how?"

JULY
2022
Bonn

HUMAN RIGHTS & OLDER AGE – WHERE RHETORIC MEETS REALITY

The first teaching, training and learning event sought to ground rhetoric around human rights issues with the experiences & perspectives of older people, professionals, and state bodies; and to examine the role of independent advocacy in protecting the rights of older people.

APRIL
2023
Vienna

THE IMPORTANCE OF PRACTICAL SOLUTIONS TO ADDRESS AND ENSURE THE RIGHTS OF OLDER PEOPLE ARE PROTECTED WITH THE SUPPORT OF INTERGENERATIONAL NETWORKS

Presentations and discussions during the three-day event spoke directly to the theme.

SEPTEMBER
2023
Bonn

FINAL PROJECT MEETING

Final meeting of all the project partners, including reflective workshop.



Each Learning & Training event will be evaluated by an independent evaluator.

PROPOSED OUTCOMES



To develop, through learning and exchange of practice, how an active citizenship and intergenerational response to protecting the human rights of older persons in the participating countries can be achieved.



Engage learners in looking at ways of protecting the rights of older people, both as individuals and as a population group.



Raise awareness about older people's legal and human rights among both older persons and in civil society generally.



Highlight areas where older persons' rights may be infringed; and identify good practice where these exist.



Sage Advocacy received funding through the KA2 – Cooperation for innovation and the exchange of good practices stream of Erasmus+ – administered by Léargas. The project has focused on safeguarding older persons' legal and human rights through active citizenship and an intergenerational approach. It involves a partnership between Sage Advocacy (Ireland), Pro Senectute (Austria), Tulip Foundation (Bulgaria) and BAGSO (Germany).

PROJECT OUTPUTS

Webpages produced in each partner country

Interactive PDF Handbook for good practice

Synthesis report

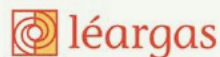
Postcards developed in all partner languages to highlight four key issues affecting the human rights of older people

Intergenerational Statement

Position Papers:
● Intergenerational Solidarity: Selected Considerations
● Loneliness & Isolation



www.sageadvocacy.ie/resources/erasmusplus



Sage Advocacy

Renewal of Governance



Renewal of governance

THE BOARD and committees of Sage Advocacy underwent a process of renewal in 2023, with six new board appointees; the term ending of the Independent Complaints Review Panel; and the consolidation of committees with two retained rather than four.

Ailis Quinlan, Bridget Clarke, Gerry O'Dwyer, John O'Driscoll, Leisha Daly and Vincent Sheridan have brought new expertise to the Board; and support with onboarding has included an Away Day in September 2023, which featured intensive learning sessions as well as facilitated discussions directed towards preparation of the upcoming Statement of Strategy 2024 - 2029. The event was also an opportunity to formally welcome Mark Mellett as Chair and to thank outgoing Chair, Patricia Rickard-Clarke, (who happily remains on the Board as Deputy Chair), for her huge contribution to Sage Advocacy and indeed to driving forward the now enacted Assisted Decision Making (Capacity) legislation. A Board presentation and thanks were also extended in 2023 to retiring member, Hon. Mary Laffoy.

The outgoing members of the ICRP, Pat Whelan (Chair), Kieran Coughlan and Caroline Lynch, provided an important watching brief on

complaints made about the service provided by Sage, finding only one complaint to be admissible. They reviewed this case and reported in considerable detail. A briefing has taken place for the new panellists, who have also participated in a 'shadow meeting' with outgoing members.

In September 2023, the Board agreed Terms of Reference for the new Planning, Policy & Performance Committee and the new Compliance, Risk & Audit Committee. These two consolidated committees now sit in place of the former four - Finance Committee; Risk and Audit Committee; Policy & Practice Committee; and Performance Oversight & Sustainability Committee.

Board membership

	Board Member	Appointment	Resignation/ Retirement	Board Meeting Attendance
Chair / Deputy Chair	Mark Mellett	01/09/2022		6 of 6
Chair / Deputy Chair	Patricia Rickard-Clarke	01/09/2017		6 of 6
Company Secretary	Brid de Buitléar	06/02/2020		5 of 6
	Ailis Quinlan	20/04/2023		3 of 5
	Bill Lloyd	01/09/2022		2 of 6
	Bridget Clarke	20/04/2023		1 of 5**
	Doreen Shivnen	22/07/2021		6 of 6
	Gerry O'Dwyer	20/04/2023		1 of 5
	Helen Burke	06/02/2020		6 of 6
	John O'Driscoll	20/04/2023		5 of 5
	Leisha Daly	20/04/2023		3 of 5
	Tim Dalton	06/02/2020		6 of 6
Chair CRA	Vincent Sheridan	20/04/2023		5 of 5
	Eoin Kennelly	04/12/2017	20/02/2024	2 of 6**
Chair PPP	Greg Price	23/09/2021	20/02/2024	4 of 6
	The Hon. Mary Laffoy	01/09/2017	16/02/2023	0 of 0

*MM was appointed to Chair and PRC was appointed to Deputy Chair on 15th June 2023

** Excused due to personal circumstances

Committee membership

Performance, Oversight & Sustainability Committee		Policy & Practice Committee		Finance Committee		Risk & Audit Committee	
Membership	Appointment	Membership	Appointment	Membership	Appointment	Membership	Appointment
Greg Price	23/05/2022	Patricia Rickard-Clarke	15/03/2018	Claire Kelly	11/12/2017	Brid De Buitléar	16/11/2020
Mark Mellett	23/05/2022	The Hon Mary Laffoy	15/03/2018	Eoin Kennelly	11/12/2017	Claire Kelly	12/02/2019
Patricia Rickard-Clarke	23/05/2022	Amanda Phelan	15/03/2018	Bill Lloyd	30/11/2020	Patricia Rickard-Clarke	12/02/2019
Tim Dalton	23/05/2022	Mary Rose Day	26/11/2019	Vincent Sheridan	22/05/2023	The Hon Mary Laffoy	12/02/2019
		Ann Leahy	04/02/2020			Eoin Kennelly	12/02/2019
		Michael Browne	15/03/2018			Bill Lloyd	05/12/2022
		Tim Dalton	26/01/2021			Colm Nolan	12/02/2019
		Ciara Dowd	13/06/2023			Ita Mangan	12/02/2019
		Ailis Quinlan	13/06/2023				
		Simonetta Ryan	13/06/2023				
		Hilary Coveney	13/06/2023				

Planning, Policy & Performance Committee		Compliance, Risk & Audit Committee	
Membership	Appointment	Membership	Appointment
Greg Price	10/10/2023	Vincent Sheridan	13/11/2023
Mark Mellett	10/10/2023	Mark Mellett	13/11/2023
Bill Lloyd	10/10/2023	Brid De Buitléar	13/11/2023
Bridget Clarke	10/10/2023	Eoin Kennelly	13/11/2023
John O'Driscoll	10/10/2023	Tim Dalton	13/11/2023
Leisha Daly	10/10/2023	The Hon Mary Laffoy	13/11/2023
Mark Mellett	10/10/2023	Colm Nolan	13/11/2023
		Ita Mangan	13/11/2023

Independent Complaints Review Panel	
Membership	Appointment
Pat Whelan	16/03/2017
Caroline Lynch	16/03/2017
Kieran Coughlan	16/03/2017
Martina Larkin	25/10/2023
Marie Tighe	25/10/2023



Staff Who Served With Sage Advocacy in 2023

Ann Griffin
Ann Roddy
Anne O'Shea Clarke
Bibiana Savin
Breda Stanley Pickford
Caroline Hanley
Catherine O'Donoghue
Ciara Gallagher
Clare O'Callaghan
Derek Meates
Elaine Howley
Emer Meighan
Fergal Graham
Geraldine Jolley

Helen Fitzgerald
Jamie Sherlock
Jennifer Connolly
John Kerrigan
Karolyn Ward
Lara Gallagher
Lisa O'Connor
Lorraine Dolan
Marisa Sousa
Martina Durkan
Mary Condell
Mary Warren
Maureen Finlay
Mervyn Taylor

Michael Cahillane
Michael Daly
Michelle Rooney
Patricia O'Dwyer
Patrick Taylor
Paula Dempsey
Regina McCormack
Sheila Hunt
Sorcha McCauley
Stephanie Monahan
Thérèse McKenna
Trish Martyn

Volunteers Who Served With Sage Advocacy in 2023

Kay Costello
Aileen Heaphy
Margaret Moriarty
Mary Davoren
Bernie Dowling
Philip Gargan
Liam Hughes

Brid Leahy / Ni Laochdha
Ann Marron
Mary Russell
Irina Spangenberg
David Clarke
Tom Clarke
Helen Gorman

Jim Milton
Bernadette O'Regan
Pat Fullam
Carmel Gartland
Tom Walsh
Nini Murray
Mary Nolan

Sage Advocacy

Financial Statements 2023

DRAFT FINANCIAL STATEMENTS 21 March 2024

Company Registration Number: 610824

Charity Number: CHY 22308

Charities Regulatory Authority Number: 20162221

Sage Advocacy Company Limited by Guarantee
Annual Report and Audited Financial Statements
for the financial year ended 31 December 2023

Whelan Dowling & Associates
Chartered Accountants and Statutory Audit Firm
Block 1, Unit 1 & 4,
Northwood Court
Santry
Dublin 9

Sage Advocacy Company Limited by Guarantee

CONTENTS

	Page
Reference and Administrative Information	3
Directors' Annual Report	4 - 5
Directors' Responsibilities Statement	6
Independent Auditor's Report	7 - 9
Statement of Financial Activities	10
Balance Sheet	11
Statement of Cash Flows	12
Notes to the Financial Statements	13 - 22

Sage Advocacy Company Limited by Guarantee
REFERENCE AND ADMINISTRATIVE INFORMATION

Directors	John O'Driscoll (Appointed 24 April 2023) Gerard O'Dwyer (Appointed 20 April 2023) Bridget Clarke (Appointed 20 April 2023) Ailis Quinlan (Appointed 20 April 2023) Leisha Daly (Appointed 24 April 2023) William Anthony Lloyd Greg Price Helen Burke Doreen Shivnen Mary Laffoy (Resigned 16 February 2023) Vincent Sheridan (Appointed 24 April 2023) Eoin Kennelly Patricia Rickard-Clarke Timothy Dalton Brid Treasa De Buitléar
Chairperson	Mark Mellett
Company Secretary	Brid Treasa De Buitléar
Charity Number	CHY 22308
Charities Regulatory Authority Number	20162221
Company Registration Number	610824
Registered Office and Principal Address	24-26 Ormond Quay Upper Dublin 7
Auditors	Whelan Dowling & Associates Chartered Accountants and Statutory Audit Firm Block 1, Unit 1 & 4, Northwood Court Santry Dublin 9
Principal Bankers	Allied Irish Bank Capel Street Dublin 7
Solicitors	Hayes Solicitors Lavery House Earlsfort Terrace Dublin 2

Sage Advocacy Company Limited by Guarantee

DIRECTORS' ANNUAL REPORT

for the financial year ended 31 December 2023

The directors present their Directors' Annual Report, combining the Directors' Report and Trustees' Report, and the audited financial statements for the financial year ended 31 December 2023.

The financial statements are prepared in accordance with the Companies Act 2014, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their financial statements in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

The Directors' Report contains the information required to be provided in the Directors' Annual Report under the Statement of Recommended Practice (SORP) guidelines. The directors of the charity are also charity trustees for the purpose of charity law and under the charity's constitution are known as members of the board of trustees.

In this report the directors of Sage Advocacy Company Limited by Guarantee present a summary of its purpose, governance, activities, achievements and finances for the financial year 2023.

The charity is a registered charity and hence the report and results are presented in a form which complies with the requirements of the Companies Act 2014 and, although not obliged to comply with the Statement of Recommended Practice applicable in the UK and Republic of Ireland FRS 102, the organisation has implemented its recommendations where relevant in these financial statements.

The charity is limited by guarantee not having a share capital.

Financial Review

The results for the financial year are set out on page 10 and additional notes are provided showing income and expenditure in greater detail.

Financial Results

At the end of the financial year the charity had gross assets of €1,134,130 (2022 - €984,624) and gross liabilities of €131,646 (2022 - €160,126). The net assets of the charity have increased by €177,986.

Directors and Secretary

The directors who served throughout the financial year, except as noted, were as follows:

John O'Driscoll (Appointed 24 April 2023)
Gerard O'Dwyer (Appointed 20 April 2023)
Bridget Clarke (Appointed 20 April 2023)
Ailish Quinlan (Appointed 20 April 2023)
Leisha Daly (Appointed 24 April 2023)
William Anthony Lloyd
Greg Price
Helen Burke
Doreen Shivnen
Mary Laffoy (Resigned 16 February 2023)
Vincent Sheridan (Appointed 24 April 2023)
Eoin Kennelly
Patricia Rickard-Clarke
Timothy Dalton
Brid Treasa De Buitléar

In accordance with the Constitution, the directors retire by rotation and, being eligible, offer themselves for re-election.

The secretary who served throughout the financial year was Bríd Treasa De Buitléar.

Compliance with Sector-Wide Legislation and Standards

The charity engages pro-actively with legislation, standards and codes which are developed for the sector. Sage Advocacy Company Limited by Guarantee subscribes to and is compliant with the following:

- The Companies Act 2014
- The Charities SORP (FRS 102)

The Auditors

The auditors, Whelan Dowling & Associates, (Chartered Accountants) have indicated their willingness to continue in office in accordance with the provisions of section 383(2) of the Companies Act 2014.

Sage Advocacy Company Limited by Guarantee DIRECTORS' ANNUAL REPORT

for the financial year ended 31 December 2023


Statement on Relevant Audit Information

In accordance with section 330 of the Companies Act 2014, so far as each of the persons who are directors at the time this report is approved are aware, there is no relevant audit information of which the statutory auditors are unaware. The directors have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and they have established that the statutory auditors are aware of that information.

Accounting Records

To ensure that adequate accounting records are kept in accordance with Sections 281 to 285 of the Companies Act 2014, the directors have employed appropriately qualified accounting personnel and have maintained appropriate computerised accounting systems. The accounting records are located at the company's office at 24-26 Ormond Quay Upper, Dublin 7.

Approved by the Board of Directors on 30th April 2024 and signed on its behalf by:



Mark Mellett
Chairperson



Vincent Sheridan
Director

Sage Advocacy Company Limited by Guarantee DIRECTORS' RESPONSIBILITIES STATEMENT

for the financial year ended 31 December 2023

The directors are responsible for preparing the Directors' Annual Report and Financial Statements in accordance with the Companies Act 2014 and applicable regulations.

Irish company law requires the directors to prepare financial statements for each financial year. Under the law the directors have elected to prepare the financial statements in accordance with the Companies Act 2014 and FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" issued by the Financial Reporting Council. Under company law, the directors must not approve the financial statements unless they are satisfied that they give a true and fair view of the assets, liabilities and financial position of the charity as at the financial year end date and of the net income or expenditure of the charity for the financial year and otherwise comply with the Companies Act 2014.

In preparing these financial statements, the directors are required to:

- select suitable accounting policies and apply them consistently;
- make judgements and accounting estimates that are reasonable and prudent;
- state whether the financial statements have been prepared in accordance with applicable accounting standards, identify those standards, and note the effect and the reasons for any material departure from those standards; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The directors confirm that they have complied with the above requirements in preparing the financial statements.

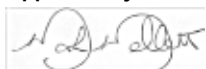
The directors are responsible for ensuring that the charity keeps or causes to be kept adequate accounting records which correctly explain and record the transactions of the charity, enable at any time the assets, liabilities, financial position and net income or expenditure of the charity to be determined with reasonable accuracy, enable them to ensure that the financial statements and the Directors' Annual Report comply with Companies Act 2014 and enable the financial statements to be audited. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the directors are aware:

- there is no relevant audit information (information needed by the charity's auditor in connection with preparing the auditor's report) of which the charity's auditor is unaware, and
- the directors have taken all the steps that they ought to have taken as directors in order to make themselves aware of any relevant audit information and to establish that the charity's auditor is aware of that information.

The directors are responsible for the maintenance and integrity of the corporate and financial information included on the charity's website. Legislation in the Republic of Ireland governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Approved by the Board of Directors on 30th April 2024 and signed on its behalf by:



Mark Mellett
Chairperson



Vincent Sheridan
Director

INDEPENDENT AUDITOR'S REPORT

to the Members of Sage Advocacy Company Limited by Guarantee

Report on the audit of the financial statements

Opinion

We have audited the charity financial statements of Sage Advocacy Company Limited by Guarantee ('the Charity') for the financial year ended 31 December 2023 which comprise the Statement of Financial Activities (incorporating an Income and Expenditure Account), the Balance Sheet, the Statement of Cash Flows and the notes to the financial statements, including the summary of significant accounting policies set out in note 2. The financial reporting framework that has been applied in their preparation is Irish law and FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with FRS 102.

In our opinion the financial statements:

- give a true and fair view of the assets, liabilities and financial position of the Charity as at 31 December 2023 and of its surplus for the financial year then ended;
- have been properly prepared in accordance with FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland"; and
- have been properly prepared in accordance with the requirements of the Companies Act 2014.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (Ireland) (ISAs (Ireland)) and applicable law. Our responsibilities under those standards are further described below in the Auditor's responsibilities for the audit of the financial statements section of our report.

We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of financial statements in Ireland, including the Ethical Standard for Auditors (Ireland) issued by the Irish Auditing and Accounting Supervisory Authority (IAASA), 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 directors' 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 charity's ability to continue as a going concern for a period of at least twelve months from the date when the financial statements are authorised for issue.

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

Other Information

The directors 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.

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 course of 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 2014

Based solely on the work undertaken in the course of the audit, we report that:

- in our opinion, the information given in the Directors' Annual Report is consistent with the financial statements;
- in our opinion, the Directors' Annual Report has been prepared in accordance with the Companies Act 2014; and
- the accounting records of the charity were sufficient to permit the financial statements to be readily and properly audited and the financial statements are in agreement with the accounting records.

We have obtained all the information and explanations which, to the best of our knowledge and belief, are necessary for the purposes of our audit.

INDEPENDENT AUDITOR'S REPORT

to the Members of Sage Advocacy Company Limited by Guarantee

Matters on which we are required to report by exception

Based on the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified any material misstatements in the Directors' Annual Report. The Companies Act 2014 requires us to report to you if, in our opinion, the disclosures of directors' remuneration and transactions required by sections 305 to 312 of the Act are not complied with by the charity. We have nothing to report in this regard.

Respective responsibilities

Responsibilities of directors for the financial statements

As explained more fully in the Directors' Responsibilities Statement set out on page 6, the directors are responsible for the preparation of the financial statements in accordance with the applicable financial reporting framework that give a true and fair view, and for such internal control as they 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 directors are responsible for assessing the charity'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 they either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

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 Auditor's 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 (Ireland) 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.

Further information regarding the scope of our responsibilities as auditor

As part of an audit in accordance with ISAs (Ireland), we exercise professional judgement and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the charity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by directors.
- Conclude on the appropriateness of the directors' use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the charity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our Auditor's Report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our Auditor's Report. However, future events or conditions may cause the charity to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

INDEPENDENT AUDITOR'S REPORT

to the Members of Sage Advocacy Company Limited by Guarantee

The purpose of our audit work and to whom we owe our responsibilities

Our report is made solely to the charity's members, as a body, in accordance with Section 391 of the Companies Act 2014. 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.

Sean Whelan
for and on behalf of
WHELAN DOWLING & ASSOCIATES
Chartered Accountants and Statutory Audit Firm
Block 1, Unit 1 & 4,
Northwood Court
Santry
Dublin 9

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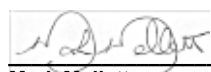
Sage Advocacy Company Limited by Guarantee
STATEMENT OF FINANCIAL ACTIVITIES
(Incorporating an Income and Expenditure Account)

for the financial year ended 31 December 2023

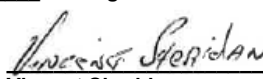
	Notes	Unrestricted Funds 2023 €	Restricted Funds 2023 €	Total Funds 2023 €	Unrestricted Funds 2022 €	Restricted Funds 2022 €	Total Funds 2022 €
Income							
Donations and legacies	4.1	35,141	65,020	100,161	1,900	78,613	80,513
Charitable activities							
- Grants from governments and other co-funders	4.2	-	2,256,338	2,256,338	-	1,778,056	1,778,056
Total income		35,141	2,321,358	2,356,499	1,900	1,856,669	1,858,569
Expenditure							
Charitable activities	5.1	6,734	2,171,779	2,178,513	1,900	1,871,229	1,873,129
Net income/(expenditure)		28,407	149,579	177,986	-	(14,560)	(14,560)
Transfers between funds		-	-	-	(664,395)	664,395	-
Net movement in funds for the financial year		28,407	149,579	177,986	(664,395)	649,835	(14,560)
Reconciliation of funds:							
Total funds beginning of the year	17	161,583	662,915	824,498	825,978	13,080	839,058
Total funds at the end of the year		189,990	812,494	1,002,484	161,583	662,915	824,498

The Statement of Financial Activities includes all gains and losses recognised in the financial year. All income and expenditure relate to continuing activities.

Approved by the Board of Directors on 30th April 2024 and signed on its behalf by:



Mark Mellett
Chairperson



Vincent Sheridan
Director

Sage Advocacy Company Limited by Guarantee
BALANCE SHEET

as at 31 December 2023

	Notes	2023 €	2022 €
Fixed Assets			
Tangible assets	10	<u>53,987</u>	<u>18,130</u>
Current Assets			
Debtors	11	32,192	10,038
Cash at bank and in hand	12	<u>1,047,951</u>	<u>956,456</u>
		<u>1,080,143</u>	<u>966,494</u>
Creditors: Amounts falling due within one year	13	<u>(131,646)</u>	<u>(160,126)</u>
Net Current Assets		<u>948,497</u>	<u>806,368</u>
Total Assets less Current Liabilities		<u>1,002,484</u>	<u>824,498</u>
Funds			
Restricted trust funds		812,494	662,915
General fund (unrestricted)		<u>189,990</u>	<u>161,583</u>
Total funds	17	<u>1,002,484</u>	<u>824,498</u>

Approved by the Board of Directors on 30th April 2024 and signed on its behalf by:



Mark Mellett
Chairperson



Vincent Sheridan
Director

Sage Advocacy Company Limited by Guarantee
STATEMENT OF CASH FLOWS

for the financial year ended 31 December 2023

	Notes	2023 €	2022 €
Cash flows from operating activities			
Net movement in funds		177,986	(14,560)
Adjustments for:			
Depreciation		8,354	6,530
Gains and losses on disposal of fixed assets		110	-
		<u>186,450</u>	<u>(8,030)</u>
Movements in working capital:			
Movement in debtors		(22,154)	(360)
Movement in creditors		(28,480)	(49,510)
		<u>135,816</u>	<u>(57,900)</u>
Cash flows from investing activities			
Payments to acquire tangible assets		(44,321)	(9,390)
		<u>91,495</u>	<u>(67,290)</u>
Net increase/(decrease) in cash and cash equivalents		91,495	(67,290)
Cash and cash equivalents at the beginning of the year		956,456	1,023,746
Cash and cash equivalents at the end of the year	12	1,047,951	956,456

Sage Advocacy Company Limited by Guarantee

NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

1. GENERAL INFORMATION

Sage Advocacy Company Limited by Guarantee is a company limited by guarantee incorporated in Ireland. The registered office of the charity is 24-26 Ormond Quay Upper, Dublin 7 which is also the principal place of business of the charity. The financial statements have been presented in Euro (€) which is also the functional currency of the charity.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The following accounting policies have been applied consistently in dealing with items which are considered material in relation to The Charity's financial statements.

Basis of preparation

The financial statements have been prepared on the going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements have been prepared in accordance with the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland FRS 102".

The Charity has applied the Charities SORP on a voluntary basis as its application is not a requirement of the current regulations for charities registered in the Republic of Ireland. As permitted by the Companies Act 2014, the charity has varied the standard formats in that act for the Statement of Financial Activities and the Balance Sheet. Departures from the standard formats, as outlined in the Companies Act 2014, are to comply with the requirements of the Charities SORP and are in compliance with section 4.7, 10.6 and 15.2 of that SORP.

Statement of compliance

The financial statements of the charity for the financial year ended 31 December 2023 have been prepared on the going concern basis and in accordance with the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland FRS 102".

Fund accounting

The following are the categories of funds maintained:

Restricted funds

Restricted funds represent income received which can only be used for particular purposes, as specified by the donors. Such purposes are within the overall objectives of the charity.

Unrestricted funds

Unrestricted funds consist of General and Designated funds.

- General funds represent amounts which are expendable at the discretion of the board, in furtherance of the objectives of the charity.

- Designated funds comprise unrestricted funds that the board has, at its discretion, set aside for particular purposes. These designations have an administrative purpose only, and do not legally restrict the board's discretion to apply the fund.

Income

Income is recognised by inclusion in the Statement of Financial Activities only when the charity is legally entitled to the income, performance conditions attached to the item(s) of income have been met, the amounts involved can be measured with sufficient reliability and it is probable that the income will be received by the charity.

Income from charitable activities

Income from charitable activities include income earned from the supply of services under contractual arrangements and from performance related grants which have conditions that specify the provision of particular services to be provided by the charity. Income from government and other co-funders is recognised when the charity is legally entitled to the income because it is fulfilling the conditions contained in the related funding agreements. Where a grant is received in advance, its recognition is deferred and included in creditors. Where entitlement occurs before income is received, it is accrued in debtors.

Grants from governments and other co-funders typically include one of the following types of conditions:

- Performance based conditions: whereby the charity is contractually entitled to funding only to the extent that the core objectives of the grant agreement are achieved. Where the charity is meeting the core objectives of a

Sage Advocacy Company Limited by Guarantee NOTES TO THE FINANCIAL STATEMENTS

continued

for the financial year ended 31 December 2023

grant agreement, it recognises the related expenditure, to the extent that it is reimbursable by the donor, as income.

-Time based conditions: whereby the charity is contractually entitled to funding on the condition that it is utilised in a particular period. In these cases the charity recognises the income to the extent it is utilised within the period specified in the agreement.

In the absence of such conditions, assuming that receipt is probable and the amount can be reliably measured, grant income is recognised once the charity is notified of entitlement.

Grants received towards capital expenditure are credited to the Statement of Financial Activities when received or receivable, whichever is earlier.

Expenditure

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any Value Added Tax which cannot be fully recovered and is reported as part of the expenditure to which it relates.

Charitable expenditure comprises those costs incurred by the company in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them.

Support costs are incurred on those functions that assist the work of the company but do not directly undertake charitable activities. Salaries and associated costs which can be attributed to specific projects are charged accordingly. Support costs also include governance costs.

Governance costs include those costs associated with meeting the constitutional and statutory requirements of the company and include the audit fees and costs linked to the strategic management of the company.

All costs are allocated between the expenditure categories in the note to the financial statements on a basis designed to reflect the use of resources. Costs relating to a particular activity are allocated directly, others are apportioned on an appropriate basis e.g. floor areas, per capita or estimated usage.

Tangible fixed assets and depreciation

Tangible fixed assets are stated at cost or at valuation, less accumulated depreciation. The charge to depreciation is calculated to write off the original cost or valuation of tangible fixed assets, less their estimated residual value, over their expected useful lives as follows:

Fixtures, fittings and equipment	-	20% Straight line
Computer Equipment	-	25% Straight line

Debtors

Debtors are recognised at the settlement amount due after any discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due. Income recognised by the charity from government agencies and other co-funders, but not yet received at financial year end, is included in debtors.

Cash at bank and in hand

Cash consists of cash on hand, demand deposits and cash held on behalf of clients. Cash held on behalf of clients is to provide a temporary banking facility to clients who meet specific eligibility criteria and are unable to open and/or manage a bank account themselves during a finite period of time.

Taxation

No current or deferred taxation arises as the charity has been granted charitable exemption. Irrecoverable valued added tax is expensed as incurred.

Pensions

The charity operates a defined contribution pension scheme for employees. The assets of the scheme are held separately from those of the charity. Annual contributions payable to the charity's pension scheme are charged to the income and expenditure account in the period to which they relate

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

continued

for the financial year ended 31 December 2023

Financial Instruments

A financial asset or a financial liability is recognised only when the company becomes a party to the contractual provisions of the instrument.

Basic financial instruments are initially recognised at the transaction price, unless the arrangement constitutes a financing transaction, where it is recognised at the present value of the future payments discounted at a market rate of interest for a similar debt instrument. Financial assets include cash at bank and in hand and debtors (excluding prepayments).

Financial liabilities are initially recognised at the transaction value and subsequently measured at amortised cost. Financial liabilities include creditors (excluding PAYE and social welfare, pension liability and deferred income).

3. SIGNIFICANT ACCOUNTING JUDGEMENTS AND KEY SOURCES OF ESTIMATION UNCERTAINTY

Going concern.

The company holds surplus funds in the amount of €1,002,484 as at 31 December 2023.

Sage Advocacy has continued its relationship with its key funder, the Health Service Executive and relationship management and funding arrangements were arranged through the Office of National Director Operational Performance and Integration. This centralised relationship is important in order to sustain a more long-term and considered relationship between the HSE and Sage Advocacy.

Sage Advocacy secured a grant agreement through the Department of Education in November 2023. The objective of the funding is to allow Sage Advocacy extend its services to Survivors of Institutional abuse.

In line with our financial controls, management completes a cash flow forecast on cash position where cash is monitored against the approved cash reserve requirement. The directors also continue to monitor costs. Sage Advocacy is of the view that, notwithstanding the challenges, that the company will be able to continue in operation for the foreseeable future and that it is and will continue to be a going concern.

Based on committed grant income over the next 12 months and cash at bank, the directors are satisfied that the company has adequate resources to continue for at least 12 months from the date of approval of these financial statements and it is appropriate to adopt the going concern basis in the preparation of the financial statements.

Determining lease commitment - Company as a lessee. The company holds a lease for its business premises at 24-26 Ormond Quay Upper, Dublin 7. The company has determined that the risks and benefits of ownership related to the leased property are retained by the lessor. Accordingly, the lease is accounted for as an operating lease.

Estimating useful lives of tangible assets. The company reviews annually the estimated useful lives of tangible assets based on the asset's expected utilisation, market demands and future technological development. It is possible that the factors mentioned may change in the future, which could cause a change in estimated useful lives.

4. INCOME

4.1 DONATIONS AND LEGACIES

	Unrestricted Funds	Restricted Funds	2023	2022
	€	€	€	€
Other donations	35,141	-	35,141	21,900
Irish Human Rights & Equality Commission	-	-	-	9,672
Erasmus	-	65,020	65,020	48,941
	<u>35,141</u>	<u>65,020</u>	<u>100,161</u>	<u>80,513</u>

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

continued

4.2	CHARITABLE ACTIVITIES		Unrestricted Funds	Restricted Funds	2023	2022
			€	€	€	€
	Grants from governments and other co-funders:					
	Health Service Executive		-	1,981,092	1,981,092	1,778,056
	Department of Education		-	275,246	275,246	-
				<u>2,256,338</u>	<u>2,256,338</u>	<u>1,778,056</u>
5.	EXPENDITURE					
5.1	CHARITABLE ACTIVITIES	Direct Costs	Other Costs	Support Costs	2023	2022
		€	€	€	€	€
	Advocacy	1,150,961	-	275,378	1,426,339	1,285,589
	Legal	29,038	-	2,735	31,773	33,289
	Research	135,933	-	2,006	137,939	113,657
	Operations / Administration	161,162	-	13,402	174,564	78,919
	Public Awareness	96,026	-	13,406	109,432	32,305
	Information & Support	256,789	-	41,677	298,466	329,370
		<u>1,829,909</u>	<u>-</u>	<u>348,604</u>	<u>2,178,513</u>	<u>1,873,129</u>
5.2	SUPPORT COSTS			Charitable Activities	2023	2022
				€	€	€
	Volunteer Expenses			1,769	1,769	609
	Staff Expenses			182,421	182,421	112,189
	Support			164,414	164,414	127,078
				<u>348,604</u>	<u>348,604</u>	<u>239,876</u>
6.	ANALYSIS OF STAFF & VOLUNTEER EXPENSES					
		Information & Support	Advocacy	Public Awareness	2023	2022
		€	€	€	€	€
	Staff Expenses	18,242	155,058	9,121	182,421	112,189
	Volunteer Expenses	973	796	-	1,769	609
		<u>19,215</u>	<u>155,854</u>	<u>9,121</u>	<u>184,190</u>	<u>112,798</u>
7.	NET INCOME				2023	2022
					€	€
	Net Income is stated after charging/(crediting):					
	Depreciation of tangible assets				8,354	6,530
	Deficit/(surplus) on disposal of tangible fixed assets				110	-
	Auditor's remuneration:					
	- audit services				6,150	6,150
					<u>6,150</u>	<u>6,150</u>

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

continued

8. EMPLOYEES AND REMUNERATION

Number of employees

The average number of persons employed (including executive directors) during the financial year was as follows:

	2023	2022
	Number	Number
Administrative	2	1
Advocacy Service	22	20
Information and Support	5	5
Legal/ Research/ Public Awareness	2	2
	<u>31</u>	<u>28</u>

The staff costs comprise:

	2023	2022
	€	€
Wages and salaries	1,426,251	1,286,677
Social security costs	127,376	138,891
Pension costs	29,603	35,501
	<u>1,583,230</u>	<u>1,461,069</u>

9. EMPLOYEE BENEFITS

No directors received any remuneration during the period. No directors' expenses have been incurred during the year.

The key management personnel of the company comprise the CEO, whose total remuneration amounted to €65,000 in 2023 (2022: €93,730). In 2022 the key management personnel included an Executive Director whose total remuneration amounted to €93,730 (this figure includes payments for TOIL (Time off in lieu) and Annual Leave). No other employee earned in excess of €60,000.

The pay of key management personnel is set by approval of the Board.

No directors or any other persons related to the company had any personal interest in any contracts or transactions entered into by the company during the financial period.

All of the amounts stated above were recognised as an expense of the company in the financial year. No amount was capitalised into assets.

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

continued

10. TANGIBLE FIXED ASSETS

	Fixtures, fittings and equipment €	Computer Equipment €	Total €
Cost			
At 1 January 2023	15,327	58,446	73,773
Additions	25,228	19,093	44,321
Disposals	-	(20,375)	(20,375)
At 31 December 2023	<u>40,555</u>	<u>57,164</u>	<u>97,719</u>
Depreciation			
At 1 January 2023	15,327	40,316	55,643
Charge for the financial year	841	7,513	8,354
On disposals	-	(20,265)	(20,265)
At 31 December 2023	<u>16,168</u>	<u>27,564</u>	<u>43,732</u>
Net book value			
At 31 December 2023	<u><u>24,387</u></u>	<u><u>29,600</u></u>	<u><u>53,987</u></u>
At 31 December 2022	<u><u>-</u></u>	<u><u>18,130</u></u>	<u><u>18,130</u></u>
11. DEBTORS		2023	2022
		€	€
Prepayments		<u><u>32,192</u></u>	<u><u>10,038</u></u>
12. CASH AND CASH EQUIVALENTS		2023	2022
		€	€
Cash and bank balances		<u><u>1,047,951</u></u>	898,621
Cash equivalents		-	57,835
		<u><u>1,047,951</u></u>	<u><u>956,456</u></u>
13. CREDITORS		2023	2022
Amounts falling due within one year		€	€
Trade creditors		<u><u>49,547</u></u>	31,660
Taxation and social security costs		<u><u>52,897</u></u>	38,973
Other creditors		-	57,175
Pension accrual		<u><u>5,294</u></u>	6,612
Accruals		<u><u>23,908</u></u>	23,887
Deferred Income		-	1,819
		<u><u>131,646</u></u>	<u><u>160,126</u></u>

Trade, other creditors and accruals are payable at various dates in the next 12 months in accordance with the suppliers' usual terms and conditions.

Tax and social insurance are repayable at various dates over the coming months in accordance with the applicable statutory provisions.

14. PENSION COSTS - DEFINED CONTRIBUTION

The company operates a defined contribution pension scheme. The assets of the scheme are held separately from those of the company in an independently administered fund.

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

continued

15. STATE FUNDING

Agency	HSE
Purpose of the Grant	Funding core services as agreed in SLA.
Term	Annual (01/01/2023 - 31/12/2023)
Total Fund	€1,979,953
Fund deferred or due at financial year end	€ Nil
Received in the financial year	€1,981,092 (Including late payment fee received €1,139)
Capital Grant	No
Restriction on use	Yes - Fund to be expended in line with SLA agreement

Note 2

The charity is compliant with Circular 44/2006 "Tax clearance procedures: grants, subsidies and similar type payments".

Note 3

The charity is compliant with Circular 13/2014 "Management of and Accountability for Grants from Exchequer Funds".

Agency	Department of Education
Purpose of the Grant	Development of Services to Survivors of Institutional Abuse
Term	Period to 31/12/2023
Total Fund	€275,246
Fund deferred or due at financial year end	€Nil
Received in the financial year	€275,246
Capital Grant	€Nil
Restriction on use	Yes - Fund to be expended in line with grant agreement

Note 2

The charity is compliant with Circular 44/2006 "Tax clearance procedures: grants, subsidies and similar type payments".

Note 3

The charity is compliant with Circular 13/2014 "Management of and Accountability for Grants from Exchequer Funds".

16. RESERVES

	2023	2022
	€	€
At the beginning of the year	824,498	839,058
Surplus/(Deficit) for the financial year	177,986	(14,560)
At the end of the year	<u>1,002,484</u>	<u>824,498</u>

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

continued

17. FUNDS		Unrestricted Funds	Restricted Funds	Total Funds
17.1 RECONCILIATION OF MOVEMENT IN FUNDS		€	€	€
	At 1 January 2022	825,978	13,080	839,058
	Movement during the financial year	(664,395)	649,835	(14,560)
	At 31 December 2022	161,583	662,915	824,498
	Movement during the financial year	28,407	149,579	177,986
	At 31 December 2023	189,990	812,494	1,002,484

17.2 ANALYSIS OF MOVEMENTS ON FUNDS	Balance 1 January 2023	Income	Expenditure	Transfers between funds	Balance 31 December 2023
	€	€	€	€	€
Restricted funds					
Restricted	662,915	2,321,358	2,171,779	-	812,494
Unrestricted funds					
Unrestricted General	161,583	35,141	6,734	-	189,990
Total funds	824,498	2,356,499	2,178,513	-	1,002,484

17.3 ANALYSIS OF NET ASSETS BY FUND	Fixed assets - charity use	Current assets	Current liabilities	Total
	€	€	€	€
Restricted trust funds	53,987	890,153	(131,646)	812,494
Unrestricted general funds	-	189,990	-	189,990
	53,987	1,080,143	(131,646)	1,002,484

18. STATUS

The charity is limited by guarantee not having a share capital.

The liability of the members is limited.

Every member of the company undertakes to contribute to the assets of the company in the event of its being wound up while they are members, or within one financial year thereafter, for the payment of the debts and liabilities of the company contracted before they ceased to be members, and the costs, charges and expenses of winding up, and for the adjustment of the rights of the contributors among themselves, such amount as may be required, not exceeding € 1.

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

continued

19. OPERATING LEASE COMMITMENTS

Operating leases charged in arriving at the net income attributable to the company amounted to €24,750. Obligations payable as at 31 December 2023 on operating lease agreements in place at that date, amounted to €49,500 analysed as follows:

	2023 €	2022 €
Within one year	27,000	27,000
After one year but no more than five years	22,500	47,250
	<u>49,500</u>	<u>74,250</u>

20. LEGAL STATUS

The charity is exempt from including the word "Limited" in its name by virtue of Section 1180 of the Companies Act 2014. The charity is limited by guarantee and has no share capital. Under the guarantee each member has undertaken to contribute, in the event of a winding up, an amount not exceeding the sum of €1.00. This guarantee continues for one financial year after individual membership ceases.

21. RELATED PARTY TRANSACTIONS

The related parties of the company are considered to be the directors, their close family members and entities which they control or in which they have a significant interest as well as members of the company.

In 2023, the company received donations as follows:

- €25,000 from a director

Transactions with Key Management Personnel

Other than as set out at Note 9 there were no transactions with key management personnel during the current financial period.

22. POST-BALANCE SHEET EVENTS

There have been no significant events affecting the company since the period end.

23. FINANCIAL INSTRUMENTS

The carrying amount for each category of financial instruments is as follows:

	2023 €	2022 €
Financial assets that are debt instruments measured at amortised cost		
Cash at bank and in hand	1,047,951	898,621
Cash held on behalf of clients	-	57,835
	<u>1,047,951</u>	<u>956,456</u>
Financial liabilities at amortised cost		
Trade creditors & Accruals	73,455	55,547
Deferred Income	-	1,819
Cash held on behalf of clients	-	57,835
	<u>73,455</u>	<u>115,201</u>

Sage Advocacy Company Limited by Guarantee
NOTES TO THE FINANCIAL STATEMENTS

for the financial year ended 31 December 2023

continued

24. CASH HELD ON BEHALF OF A CLIENT

This account was for one client only. The purpose of the account was to provide a temporary banking facility for a Sage Client who met specific eligibility criteria and was unable to open and/or manage a bank account themselves during a finite period of time.

The fund was transferred to the client in 2023. The Company is not holding any funds on behalf of clients or third parties at the year end. The Company closed the Client Agency bank account and there is no plan to operate an agency account in the future.

	2023	2022
	€	€
Cash held on behalf of a client	-	57,835
	<u> </u>	<u> </u>

25. APPROVAL OF FINANCIAL STATEMENTS

The financial statements were approved and authorised for issue by the Board of Directors on

ACCOUNTS STATUS

Sage Advocacy Company Limited by Guarantee Financial Statements 31st December 2023

Task	Staff	Status	Completed	Narration
Books Requested		Not Started		
Books Received		Not Started		
Draft TB		Not Started		
Partner Review		Not Started		
Adjustments		Not Started		
Adjusted Profit Comp		Not Started		
Final Adjustment		Not Started		
Ready for Signing		Not Started		
Accounts Filed		Not Started		
Closedown		Not Started		

Information & Support Service



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Nursing Home

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