



Registered Charity No. 1038129
www.liv.ac.uk/ssp/interchange

Annual Report and Accounts

2008-2009



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CONTENTS

Interchange Factfile	2 - 3
Interchange Acknowledgements and Thanks	4
Interchange – An Overview	5 - 6
Chair’s Report	7
Academic Supervisor Reports	8 - 11
Outcome of the placements	12 - 13
Perspective of a new trustee	13
Achievements of the year	14
The future of interchange	14
Financial support	15
Financial report	16
Annual Accounts and Independent Examiners Report	17 - 21

Interchange

Learning through Service
A member of the International Science Shop Network
[\(\[www.livingknowledge.org\]\(http://www.livingknowledge.org\)\)](http://www.livingknowledge.org)

Interchange

FACTFILE

Principal Office of the Charity:
School of Sociology and Social Policy
University of Liverpool
Bedford Street South
Liverpool
L69 7ZA
Tel: 0151 794 2986
Email: interchange@liverpool.ac.uk

Board of Trustees:

Ms. Louise Hardwick (Chair)

Ms. Gwen Lightfoot (Secretary)

Mr. Philip Hurst (Treasurer)

Ms. Natasha Butler

Dr. Margaret Coffey

Dr. David Hall

Dr. Trish Lunt

Ms. Barbara McNamara

Dr. Dave Whyte

Ms Lindsey Metcalf

Staff:

Interchange Co-ordinator position has until recently been filled on a sessional basis

Independent Examiner:

Ian Leadbetter, Community
Accountant

Sefton CVS

3rd Floor, 3tc

16 Crosby Road North

Waterloo

Bankers:

NatWest

Liverpool University Branch,

5 Oxford Street

L7 7HL

Interchange Acknowledgements and Thanks

The Interchange committee would like to thank: -

- Barbara McNamara who has given administrative support and liaised with VCOs for future placement opportunities. Also her contribution to the academic team at the University of Liverpool through her SPSS sessions and supervision.
- Philip Hurst for his work as treasurer and effort to discover appropriate funding sources in the third sector
- Gwen Lightfoot for her work as Secretary and advice to the Board
- To all the other trustees for their continuing support.

Interchange – An Overview

Aims:

Interchange is an unincorporated association that was registered as a charity with the Charity Commission for England and Wales on 18th May 1994. Our constitution and objects were revised on 26th June 2003 to include student volunteering within the curriculum and now read as follows: -

1. The advancement of education by: -
 - a. bringing together charitable groups in the area of Merseyside and neighbouring Districts and students in Higher Education in the same areas for the purposes of conducting research projects and collating organising and disseminating the results of such research for public benefit
 - b. enabling such students to pursue projects, research and experimental work considered to be for public benefit
 - c. enabling students to undertake volunteering opportunities as part of the curriculum
2. To promote any charitable purposes for the benefit of the community in Merseyside and neighbouring Districts by providing charitable groups operating within the area of benefit with advice, training, volunteering and scientific or technical information and by any other assistance appropriate to the use of scientific or technical information so as to enable such organisations to carry out their Charitable work more effectively and efficiently for the benefit of the Community.

Funding

- In 1995 Interchange received the award of Partnership Trust, for its 'Innovation in teaching and learning in Higher Education' and funding from the Higher Education Research Development Fund (HEDF3), designed to make the academic curriculum more geared to the needs of employers and the economy thereby reflecting New Labour's pledge to meet the needs of business and transfer market values to the welfare sector (Farnsworth, 2006; Lambert, et al. 2007).
- 1997-2001 Interchange was also part of the C-SAP (Centre for Sociology, Anthropology & Politics) funded CoBalt project (Community Based Learning Teamwork). This was conducted in partnership with The University of Liverpool, Liverpool Hope University and The University of Birmingham. The project's aims were to assess whether students developed their careers through their Interchange projects, and whether the host organisations had used the research findings to review their services, or to improve training and recruitment, or to aid policy analysis.
- Interchange was also involved in, and received funding from, the European Science Shops movement. This movement started in the Netherlands and extended to Germany, Denmark, the UK, Austria, and Romania with the idea of developing "a working-relationship between knowledge-producing institutions like universities and citizen groups that need answers to relevant questions" (Lydesdorff & Ward, 2005:353). Many of the Science Shops had little in common, other than a working relationship between the university and local community to address local research questions. Each Science Shop initiative reflected a situated understanding of an aspect of civil society within the context of national, community and institutional constraints (Lydesdorff & Ward, 2005). Interchange benefitted from EU funding schemes for

Science Shops (INTERACTS, 2001-2003) to disseminate best practice of Science Shops, and then Training and Mentoring of Science Shops (TRAMS, 2005-2008) to offer research, training, and support to community organisations.

- Up until 2008 the University of Liverpool also gave a grant to cover a coordinator's salary from the 'Reach Out Growth Fund' (HEIF3), and - when this was no longer available - continued to provide ongoing part time administrative support to Interchange from internal funding sources, thus ensuring it remained operational for students. Currently HEFCE does not provide funding for volunteering in the form of community-based learning as it is perceived as just 'volunteering' and not directly connected to teaching enhancement (Future support for teaching enhancement and widening participation [online on]http://www.hefce.ac.uk/pubs/hefce/2008/08_28/).
- Other than these funding sources Interchange has received one-off grants from community bodies like the John Moores Foundation, Liverpool City Council, and the Eleanor Rathbone Trust.

Achievements for this Financial Year

- The main activity continues to be the facilitation of student projects in applied social research and work projects with the voluntary and community sector on Merseyside, as detailed below.
- The successful work of applied social research projects conducted in the Health Department at Liverpool Hope University continued for the fifth year

Louise Hardwick

Chair's Report

Interchange continues to encourage collaboration with the community for both learning enhancement for the student and public benefit for the community. Although Interchange presently struggles to raise funds as a charity and falls outside mainstream Higher Education (HE) funding it has had a record number of Voluntary Community Organisations (VCOs) seeking a student and the Interchange modules have been heavily oversubscribed. By remaining a charity rather than exclusively mainstream HE provision it has managed to maintain partnerships with a wide range of community organisations and attracts trustees from both the HE institutions, ex-students and representatives of VCOs.

Interchange has faced a number of challenges with the departure of three significant people: Sharon Lockley who had acted as coordinator for 15 years and David and Irene Hall who founded Interchange and embedded it in their pedagogic literature (Hall & Hall, 1996; Hall et al. 2000; Hall & Hall, 2001, http://www.c-sap.bham.ac.uk/resources/project_reports/overviews; Hall & Hall, 2004; Hall et al, 2004).

Also, with the University of Liverpool (who host Interchange), having launched its new Strategic Plan with the appointment of Sir Howard Newby as the Vice Chancellor, it is unclear how Interchange will be perceived and supported with these new developments. There would appear to be reasons for optimism as some of the University's strategies coalesce with Interchange's mission of:

- Driving knowledge exchange and innovation
- Enhancing the student experience

Through this uncertain time Interchange has sustained its charitable value-base and remained steadfast to its core service activity to work collaboratively *with* the community in facilitating 'in-reach' and 'out-reach' knowledge for both students and VCOs for public benefit. This has been regardless of changing policy trends and institutional pressures that might have steered it off track. It is this dual consideration of both the student's learning and benefit to VCOs that continues to make Interchange distinctive.

Louise Hardwick

Academic Supervisor Reports

The University of Liverpool – Supervisor’s Report

In the academic year 2008/09 Louise Hardwick and Dave Whyte taught on both the Applied Social Research module and the ‘Social Policy Project: Work-Based Learning’ module. These community-based learning modules provide an alternative route to doing a conventional desk-top dissertation for social science students in the final year of their degree.

University of Liverpool ‘Applied Social Research’

In the academic year 2008-09, we had another excellent set of student projects with the voluntary, community and faith sector on greater Merseyside. Brief details of these applied research projects from Liverpool University are as follows:

Research & work projects 2008/09

Student	Applied Social Research for a Voluntary Community Organisation
Rebecca Beaumont	Local Solutions is a large social enterprise in the North West, established in 1974. Rebecca undertook an evaluation of the University’s early years Children’s Centre.
Anita Cradock	Local Solutions. Anita explored the longer-term impact of the Welfare Rights provision on the lives of service users.
Amanda Formby	Liverpool Council for Voluntary Service. Amanda investigated the views of a number of welfare agencies in relation to the level of provision for problematic drug users.
Sarah Greenhow	Positive Futures and Disabled Children’s Register in Sefton have a partnership service to encourage children and young people with learning difficulties to take part in sporting and leisure pursuits. Sarah investigated the views of parents of young people with Asperger’s autism in relation to appropriate leisure services.
Kathryn Lavender	Litherland Youth Centre offers a variety of services for young people in Sefton. Kathryn investigated the views of the young people in relation to existing and future provision.

Yvette Lewis	KUC provides information, advice & guidance on jobs, education and training to support local residents to access training, education and job opportunities. Yvette measured the impact of some of the programmes from the perspective of the service users.
Nyree Miller	St. Helens Community Voluntary Service. Nyree investigated the impact of the training provided by St. Helens CVS to local voluntary organisations.
Carla Miller	Merseyside Youth Association offers a range of youth services to children and young people. Carla investigated the views of some of the young people who use these services.
Sherece Rowlands	Sefton CVS with HMP Kennet. Sherece evaluated the benefits of family days for the prisoners.
Sophie West	Wellington Avenue Methodist Centre (WAM) is a community centre. Sophie investigated current service provision for families in the Picton/Earle Rd areas.
Pamela Wilkinson	Wired provides a service to disabled children, adults and their carers. Pamela designed a questionnaire that can be used internally and externally to evaluate the services and measure outcomes for service users.
Sophie Jobling	The Aspire Trust is a charity which provides innovative education and learning partnerships between school communities, and the arts. Sophie investigated the impact of a school closure from the perspective of the members of the replacement school.
Emma Woolley	The Ferries Family Group offer local people the opportunity to meet with others where they can relax and chat together, and also receive support. Emma investigated the impact of these services for service users.
Catherine Simmons	The Merseyside Diabetes Support Group offers information and support to people with diabetes and their families. Catherine contacted service users, community leaders and BME communities to identify gaps in the service.

One further project was established with Liverpool Community Voluntary Service but regretfully this could not be completed because of the student suspending his studies after the first semester. The following placements were for Social Policy Project: work-based learning in 2008/09:

Student	A Work Project for a Voluntary Community Organisation
Dawn Hughes	Enable is an enterprise facilitation initiative in North Liverpool based on the 'Sirolli Concept'. Dawn produced pamphlets showcasing a number of case studies demonstrating the benefits of the service.
Vicki Steele	The Ferries Family Group offer local people the opportunity to meet with others where they can relax and chat together, and also receive support. Vicki developed a self-evaluation sunflower for service users.
Evelyn Tayler	YKids is a children's charity with a Christian ethos which works with children in Bootle. Evelyn collated a volunteer handbook.
Ruth Thomas	The Aspire Trust is a charity which provides innovative education and learning partnerships between school, communities, and the arts. Ruth investigated literature and the practice of community opera.
Emma Thraves	Sefton CVS with HMP Kennet. Emma collated information on useful voluntary community organisations prisoners might use on release.

Louise Hardwick

Liverpool Hope University, School of Health Sciences

While most of the projects were with the School of Sociology and Social Policy at the University of Liverpool, we again had projects with the School of Health Sciences at Liverpool Hope University, where Margaret Coffey is the project supervisor.

Catherine Simmons	Merseyside Diabetes Support Group was established in 1996 in order to support local people with diabetes by providing a range of support services including a helpline, publications and monthly meetings. Its volunteers also provide information to patients at healthcare locations.
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Margaret Coffey

Community-Based Learning Placements (University of Liverpool)

The Careers & Employability Service has continued to work in partnership with the School of Sociology & Social Policy to support the development of placement opportunities in the local community for the Year 2 module. Although the Careers & Employability Service did lose a key member of staff, Sarah Jones, the volunteer co-ordinator in July 2009, a new co-ordinator has now been appointed and she has worked with other colleagues in the Student Development Team to continue to support the Year 2 module.

Trish Lunt

Outcomes from the Placements

Students:

We are delighted to report that Interchange student Sarah Greenhow won the Lundy Memorial Prize.



"It was a chance to work on a project that I am interested in that wouldn't have otherwise been possible. It looks fantastic on your CV and allows you to get the most out of your degree." In the picture: Sarah Greenhow (dissertation prize winner 2009) and Professor Sandra Walklate. University of Liverpool

This followed the tradition of the past three years that has seen Interchange student Barnabus Shearer, winning the prize in 2008 for Rampworx, Chris Parry in 2007 for her research for Wirral Women and Children's Aid, following on from Barbara McNamara's success in 2006 for her research for Helplink, Wirral.

Benefits for community and faith organisations on Merseyside:

Follow-up monitoring and evaluation of the student placements provided extremely positive feedback from organisations, a few quotes from this year's organisations include: -



"The student produced a really useful report that has been shared with our Board of Directors and will be fed into the Local Authority Adult & Community Learning quality system through the Go Learn Partnership"



Training & Development Manger, St. Helens CVS

"Interchange has enabled us to get work done which is important but gets squeezed out due to the crisis we deal with as a charity. Quotes from the research have been used in funding applications. Two excellent pieces of work carried out by two wonderful students".

Agency Representative, Ferries Family Groups Ltd.



“The report will be used as evidence in the future for funding purposes. The student produced a knowledgeable and comprehensive report that we can use to develop our services. As a small, but growing organisation we would never have had the time to complete such an extensive piece of research.”

“The report has informed ongoing research findings (used in a paper given in Ethiopia at an educational research conference)”

Director of the Aspire Trust

Perspective of a new Trustee

Lindsey Metcalf joined the Interchange board of trustees in December 2008. She is based in the School of Sociology & Social Policy at the University of Liverpool, and is undertaking PhD research about the implications of social policy initiatives for trustees and their organisations. The research, entitled *“Governance and Public Services: Trustees’ experiences of the changing role and responsibilities of the third sector”*, uses qualitative methods to explore the experiences of trustees who volunteer in local charities.

Lindsey was previously a senior manager in central government, in a diverse range of roles including operational management, policy development, equality and diversity, organisational development and project management. She also worked on secondment to the voluntary sector as a volunteer manager. She has been a trustee and volunteer in several charities, including those working in the areas of domestic violence, LGBT support, mental health, youth work and mentoring. She said *“Interchange has an excellent reputation among students and local charities for supporting high quality research that benefits local people and groups in Merseyside. I’m very proud to join the Interchange board and hope to contribute to and support the valuable work that Interchange does”*.

Achievements of the year

Community Research Skills Training

The University of Liverpool provided research training to community organisations that had expressed an interest in taking a student but hadn't been selected by a student, through their Community Research Educational Programme.

Website

The Interchange Website is now well embedded into the University's preferred format and can be accessed easily from the School of Sociology and Social Policy web pages, www.liv.ac.uk/ssp/interchange the web site holds information on student projects, and previous annual reports in pdf format. It continues to be updated by the Interchange Co-ordinator.

Conferences

Hardwick, L. 2008 'Developing partnerships for student volunteering' Institute for Learning Enhancement & C-SAP, Wolverhampton

The Future of Interchange

Interchange is committed to exploring the future development of our work in relation to identified trends both within HE and the third sector. To this end Interchange is planning an away day facilitated by Liverpool CVS to explore our strengths and weakness and develop achievable strategies for the short and long term.

Securing Sustainability for Interchange Service:

Interchange currently manages a relatively small budget, which supports our ongoing core service. In the short-term a number of differing administrators have been appointed to secure the ongoing student placement programme. Longer-term solutions to the delivery of the Interchange service are still being discussed with University of Liverpool and by the management committee in terms of external funding.

Evidenced-based knowledge of the contribution of Interchange to local charities:

Margaret Coffey and Louise Hardwick have drawn together a research proposal to discover potential benefits to VCOs of interchange placements. The study will focus on the experience of 20 Merseyside VCOs, who take student researchers through Interchange in 2009/10.

Financial Support

- Eleanor Rathbone Foundation for their grant of £5000 to the University of Liverpool to support a part time coordinator post.
- University of Liverpool, Faculty Dean for funding 11 hrs administrative support to Interchange

'In-Kind' Support

- The University of Liverpool for hosting Interchange in the School of Sociology & Social Policy
- Liverpool Hope University, Margaret Coffey, Department of Health & Sociology (*Student Placements*)
- University of Liverpool, Sarah Jones Community Bridge, Careers & Employability Service based in the Centre for Lifelong Learning (*student and volunteer placements*)

Financial report

This financial year has seen a significant period of change and review within Interchange. As a result of ongoing planning and discussions on the future direction and role of the charity in the context of University changes and the evolving understanding of community research and other support needs of voluntary, community and faith sector organisations, financial activity during this year has been less compared to previous years.

The main financial activity during this period has been associated with the completion of the Community Research Training programme that was delivered through Neighbourhood Learning for Deprived Communities in Wirral. This represented a key pilot project that has tested the ability of Interchange to branch out from our core activity of university student placements to support VCF organisations in their community research needs.

Future financial activity will be largely shaped by outcome of planning discussions by the committee to identify viable project and service delivery options through which Interchange will be able establish a niche to complement statutory university delivery responsibilities as well as the generic role of VCF sector infrastructure organisations. Subject to the nature of these plans, a review of the charity's financial systems may be needed to ensure that the charity's management capacity grows alongside our aspirations.

The final note relating to this financial year is that the end of financial year date has been changed from 31st March to 31st August. This is to bring the charity's annual reporting timescales in line with the academic year, as previous report cut across two academic years and therefore two rounds of student placements. Annual reporting from now on will accurately profile the range of student placements delivered in that academic year.

Philip Hurst (Treasurer)

INDEPENDENT EXAMINER'S REPORT

to the trustees of Interchange

I report on the accounts of the charity for the year ended 31st August 2009 which are set out on pages 19 to 21.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 43(2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

I report on the accounts of the charity for the period ended 31st August 2009 which are set out on pages 19 to 21.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 43(2) of the Charities Act 1993 (the 1993 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 43 of the 1993 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 43(7)(b) of the 1993 Act; and
- to state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
- to keep accounting records in accordance with section 41 of the 1993 Act; and

- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 1993 Act

have not been met; or

(2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Steven Hughes
Community Accountant
Sefton Council for Voluntary Service
3rd Floor, 3tc Building,
16 Crosby Road North, Waterloo
Liverpool, L22 0NY

Interchange
RECEIPTS AND PAYMENTS ACCOUNT
for the period 1st April 2008 to 31st August 2009

	Unrestricted Funds	Restricted Funds	Period to 31 st August 2009	Period to 31 st March 2008
	£	£	£	£
RECEIPTS				
Grants, Donation and Payments	35	-	35	8,228
Bank Interest	115	-	115	158
	-----	-----	-----	-----
Total receipts	150	-	150	8,386
	-----	-----	-----	-----
PAYMENTS				
Salary Costs	-	-	-	4,000
Staff Expenses	-	16	16	710
Venue Hire	-	321	321	885
Research Training Expenses	-	2,791	2,791	800
Research Training Promotion & Administration	-	640	640	-
Sundry	154	-	154	-
	-----	-----	-----	-----
Total payments	154	3,768	3,922	6,395
	-----	-----	-----	-----
Net (payments) / receipts for the period	(4)	(3,768)	(3,772)	1,991
	-----	-----	-----	-----
Cash Funds brought forward at 31st March 2008	5,800	5,500	11,300	9,277
	-----	-----	-----	-----
Cash Funds carried forward at 31st August 2009	£5,796	£1,732	£7,528	£11,300
	=====	=====	=====	=====

Interchange
STATEMENT OF ASSETS AND LIABILITIES

At 31st August 2009

	2009		2008	
	£	£	£	£
Current assets				
Current account	1,339		1,226	
Reserve account	6,189		10,074	
	-----		-----	
Net current assets / (liabilities)	7,528		11,300	
	=====		=====	

These financial statements were approved by the Trustees onand signed on their behalf by:-

..... Chair

..... Treasurer

Interchange
RECEIPTS AND PAYMENTS ACCOUNT
for the year ended 31st August 2009

1. Accounting Policies

Basis of Accounting

The accounts have been prepared under the receipts and payments basis.

Taxation

The Charity has charitable status and is thus exempt from taxation of its income and gains falling within Section 505 of the Taxes Act 1988 or Section 256 of the Taxation of Chargeable Gains Act 1992 to the extent that they are applied to its charitable objectives.

2. Restricted Funds

	Balance as at 31 st December 2008	Incoming Resources	Resources Expended	Balance as at 31 st December 2009
	£	£	£	£
Wirral NLIDC	5,500	-	3,768	1,732
	-----	-----	-----	-----
Total Restricted Funds	£5,500	-	£3,769	£1,732
	=====	=====	=====	=====