

SANDWELL CITIZENS ADVOCACY

England & Wales · Charity number 1019779

Details

Other names SANDWELL ADVOCACY

Status Registered

Legal form Other

Registered 1993-04-07

Register [View on the Charity Commission register](#)

Contact

Address Sandwell Advocacy
28 Wood Street
Tipton
DY4 9BQ

Phone 01215208070

Email sandwelladvocacy@btconnect.com

Website www.sandwelladvocacy.org

Activities

Objects: TO RELIEVE THE NEED OR DISABILITY OF PERSONS WITHIN THE BOROUGH OF SANDWELL SUFFERING ANY IMPAIRMENT OF THEIR MENTAL OR PHYSICAL FACILITIES.

Activities: To relieve the needs or disability of persons within the borough of Sandwell who suffer an impairment of their mental or physical faculties or who are vulnerable or at risk

Classification

- **How:** Provides Human Resources, Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, Disability
- **Who:** Children/young People, Elderly/old People, People With Disabilities, The General Public/mankind

Geography

- **Area of benefit:** BOROUGH OF SANDWELL
- Sandwell

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£230,097	£207,734	-	-
2024-03-31	£223,639	£209,891	-	-
2023-03-31	£226,636	£205,823	-	-
2022-03-31	£230,445	£229,464	-	-
2021-03-31	£239,183	£212,800	-	-

Trustees

Name	Role	Appointed
Gurdeep Hanspaul	Chair	2020-11-26
Cherry Simms		2025-05-22
Daljit Kumar		2026-04-23
Geraldine Brown		2013-12-03
PATRICIA GOLDING		

Accounts

SANDWELL CITIZEN ADVOCACY
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

SANDWELL CITIZEN ADVOCACY

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Gurdeep Hanspaul (Chair) Lesley Donnelly Pat Golding Geraldine Brown Carmen Tulloch
Charity number	1019779
Principal address	28 Wood Street Tipton West Midlands DY4 9BQ
Independent examiner	Neal and Co Business Services Limited Shakespeare Buildings 26 Cradley Road Cradley Heath West Midlands B64 6AG
Bankers	Unity Trust Bank Plc Nine Brindleyplace 60 Broad Street Birmingham B1 2HB

SANDWELL CITIZEN ADVOCACY

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SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2025

The Trustees present their annual report and financial statements for the year ended 31 March 2025.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

Objectives and activities

Structure, Governance and Management

The charity whose operational name is "Sandwell Advocacy" is governed by a constitution originally adopted by the members on 26th March 1993 but subsequently amended and adopted at the AGM on 26th June 1996, and further amended at the AGM on 17th November 2011.

The Trustees who served during the year were:

Lesley Donnelly	(Resigned Chair 06/02/2025)
Patricia Golding	
Geraldine Brown	
Gurdeep Hanspaul	(Appointed Chair 06/02/2025)
Carmen Tulloch	
Leah Haynes	(Resigned 11/04/2024)
Yvonne Murray	(Resigned 06/02/2025)

The Management Committee is elected annually by the membership and comprises of:

1. at least four members
2. up to three people co-opted by the management committee
3. representatives of active advocates and partners up to a maximum of nine

The committee meets as and when required but not less than once every three months and a quorum of one third of the committee, including an officer is required. Each management committee member whether elected or co-opted has one vote.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

Objectives and Activities

The objectives of the charity are to promote and safeguard the rights and wishes of marginalised and vulnerable individuals within our community. To support people to ensure that they are able to explore avenues open to them, to plan and discuss options and make informed decisions. Ultimately, we aim to empower the people of Sandwell to have more say and control over what happens in their lives, which we feel promotes a more inclusive society.

The aims adopted by the Charity to achieve these objects are as follows:

- a) To assist such people to obtain their full rights as a citizen.
- b) To provide long term personal support.
- c) To provide advocacy support on a one to one basis whether they reside in their own homes, in institutional care, or with relatives.

These aims and objectives will be achieved through provision of both paid and volunteer advocates. Both will receive relevant and appropriate training and support to ensure that they are able to perform their roles effectively.

We refer to those we support as 'advocacy partners' as we feel that our relationship is an equal partnership. The term 'client' or 'service user' are those used by providers of services and often have negative connotations for those who have accessed them.

An advocate will:

- Support the partner in expressing their views, concerns and opinions.
- Speak on behalf of the partner, raising any issues where required, but only as the partner wishes. It is desirable that people regain their own power to speak for themselves where possible. Advocates will support people when they speak for themselves.
- Develop a one to one relationship with a person for as long as the person wishes it to continue.
- Allow the partner to make his or her own decisions and choices whenever possible, even if the process of engagement is slow and uncertain. An advocate ensures that their partner retains maximum control.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

Achievements and Performance.

The period from April 2024 to March 2025 was another busy and impactful year for Sandwell Advocacy. Our Board of Trustees have supported our staff, and volunteers to continue to deliver essential independent advocacy support to those most in need within our community. We are proud to note that during this time, we entered our 31st year of providing independent advocacy across Sandwell, a milestone that reflects our ongoing commitment and dedication. Throughout these three decades, we have remained unwavering in our core belief: ensuring that people's voices are heard and their rights are protected.

Our Board of Trustees plays a pivotal role in overseeing governance and shaping our strategic direction. Throughout this period, we maintained a proactive approach to advancing our objectives and strategies. During the year, we saw a significant change in leadership as Lesley Donnelly, our Chair since 2013, stepped down after an outstanding 16 years of service, having first joined the Board in 2009. Lesley's dedication and commitment to our organisation and its values have been truly remarkable. I was delighted to step into Lesley's shoes and accept the position of chair going forward, I will continue to champion our vision and drive forward vital advocacy projects to meet the needs of those who rely on us most. We also, with regret, accepted the resignations of both Leah Hayes and Yvonne Murray during this period. We extend our sincere thanks for their valuable contributions, which are very much appreciated. We continued to promote opportunities for potential new members to join the Board and began developing a more structured approach to Trustee recruitment, training, and induction.

As always, the management team works closely with Dave Bradshaw, our Chief Executive Officer, who oversees the day-to-day management of our staff and services. Dave brings both vision and a wealth of experience to the organisation, leading a dedicated and focused team committed to delivering excellence. He keeps the Board fully informed on activities and collaborates with us to shape and implement our strategic objectives. At the same time, Dave maintains a hands-on, team-focused approach, ensuring strong support for our operational activities.

Our Advocacy Project for Young Carers continued to thrive throughout this period, providing vital support to children, young people, and their families. We are extremely grateful to Sandwell Children's Trust for funding this much-needed project for a further 12 months.

Helen Charles (Senior Independent Advocate) and Sharon Wilson (Independent Advocate) remained dedicated to delivering one-to-one, person-centred advocacy support. In addition to this individual support, we organised group activities and continued to work closely with our User-Engagement Group to ensure young carers' voices were heard. A highlight of the year was a popular summer outing to Inflata-Nation, where children, young people, and their parents/carers enjoyed a fun-filled day together.

We also remain committed to investing in our staff and their ongoing professional development, an essential part of maintaining a highly skilled team capable of delivering quality advocacy services. It was particularly rewarding to see Helen Charles achieve her qualification in Independent Advocacy in Child Protection and Family Courts during this period. Helen also led safeguarding training sessions for our team this year, ensuring everyone was up to date with best practices.

Our Advocacy Feedback Support Service continued to receive grant funding from Sandwell Metropolitan Borough Council. This vital service, delivered by Carol Turley (Advocacy Support Officer), operates across Nursing, Residential, and Extra Care settings, as well as Day Centre Units. It ensures that residents in these environments have a voice, enabling them to share their experiences and express their views on the care they receive and the changes they would like to see.

A notable development during this period was the recruitment of new volunteers to support the project. After completing a structured programme of training and shadowing, these volunteers gained the skills and confidence to work independently, while continuing to receive guidance and support from Carol.

The Sandwell Advocacy Voice and Empowerment (SAVE) Project continued to make a significant impact throughout this period, thanks to the generous support of various Trusts, grant-making foundations, and charities. This vital project provides advocacy, enabling, and support services for children and young people experiencing poor mental health and/or behavioural challenges. Its aim is to empower them, ensuring their rights are upheld and their voices and wishes are heard. Our dedicated independent advocates, Helen Charles and Sharon Wilson, delivered person-centred support through this project, helping young people navigate difficult circumstances with confidence and dignity.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

This period marked the final year of our Voices and Choices project, a three-year initiative funded by the Albert Gubay Foundation. Helen Charles, our Senior Independent Advocate, has taken the lead on this project, which continued to be busy with referrals from a variety of sources, including Adults Social Care, Social Prescribers, the Community Offer, and relatives or family members.

The project provides vital support for older people with long-term health conditions, helping to:

- Ensure that older people who wish to remain living independently in their own homes receive the appropriate support to do so.
- Ensure that older people, along with their families, carers, or friends, have access to relevant information and guidance when considering a move into care provider accommodation, enabling them to make informed decisions about their care options.

Louise Jones continued her role as Volunteer Co-ordinator for our Sandwell Together telephone befriending service throughout this period. We were proud to mark our 400th referral since the service was established in 2020. Sandwell Together continues to grow, providing volunteer befrienders who offer emotional support and a listening ear to lonely and isolated residents across Sandwell.

Louise's primary responsibilities as Volunteer Co-ordinator include:

- Developing a volunteer recruitment strategy
- Managing volunteer enquiries and the application process
- Promoting the service to a broad range of stakeholders
- Reviewing volunteer policies and the handbook
- Training volunteer befrienders
- Managing referrals and matching volunteers with service users
- Providing ongoing support and supervision for volunteers

Our volunteer recruitment efforts were particularly successful this period, resulting in a significant increase in the number of volunteers. This has allowed us to expand the service and provide greater support to lonely and isolated residents.

In October 2024, we introduced a Volunteer Peer Support Group to further enhance the support offered to Sandwell Together volunteers. This initiative has been highly successful in fostering team cohesion, sharing information and good practice, supporting ongoing development, and providing a forum to discuss any challenges faced by volunteers.

As is customary, we celebrated National Volunteers Week in June this year to recognise and celebrate the invaluable contributions of all our volunteers. This year, we hosted an afternoon tea at Langley Lodge, which was well attended and enjoyed by everyone.

Our Birmingham Bereavement and Wellbeing Service, funded by Birmingham City Council, continued throughout the year, providing vital support to carers experiencing loss and bereavement. This service is delivered in partnership with a range of local health, social care, and wellbeing providers as part of the Communities in Sync consortium. Helen Charles leads the project in her role as Senior Bereavement Officer. As expected, the service experienced high demand, with a significant number of referrals received, reflecting the essential support it provides to the community.

Our Parents Advocacy, Guidance and Empowerment (PAGE) Project, funded by the National Lottery, supports parents with a learning disability and/or autism who are subject to, or at risk of, interventions from Children's Services. The Project offers a range of support, including independent advocacy and independent living skills training. We work closely with Ideal for All, another partner organisation within the Communities in Sync (CIS) consortium, to deliver this service.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

PAGE focuses on developing trusting, user-led relationships, ensuring that parents with a learning disability understand proceedings, explore their options, and remain at the centre of all decision-making processes. Kirsty Kemp continued to deliver the project in her role as Independent Advocate for most of this period. In March 2025, Kirsty moved on to pastures new, and Helen Charles stepped in on an interim basis to ensure a seamless handover and continuity of support for parents.

Our management and operational team are ably supported by Sharon Jenkins, our Business Support Officer. Sharon has been with the organisation since 2021 and is often the first point of contact for callers and visitors to Sandwell Advocacy, handling each interaction with confidence and expertise. She has become a versatile and invaluable member of the team, bringing a wealth of skills and experience to the role.

The operational activities of Sandwell Advocacy are supported by the extensive work of our management team, staff, volunteers, and beneficiaries in developing clearly defined aims and objectives. To ensure effectiveness, we conduct thorough consultations with all stakeholders, the results of which are incorporated into our Business Plan. This plan outlines our key priorities over a three-year period and serves as a roadmap for achieving our vision for the future.

We recognise the importance of involving as many stakeholders as possible in shaping our strategic direction. Regular Development Away Days provide an opportunity for trustees, staff, volunteers, and users to share their views and feedback, which informs our strategic and business development model. Our most recent Development Away Day took place at Sandwell Valley Visitor Centre on 15th October 2024 and was facilitated by Steph Vidal-Hall of Making Meetings Matter, a qualified Thinking Environment coach and facilitator. The primary focus of the day was to explore what makes the organisation sustainable and to consider how this informs our goals for the next three years.

We recognise the importance of building an effective digital and social media presence in today's digital world and have considered the investment required to ensure our output is current and impactful. To achieve this, we worked with Brand Creative Media, who also manage our website, to develop a coherent communications strategy that is well-planned and properly resourced. In July 2024, we made the decision to outsource our digital marketing strategy to Brand Creative Media. This partnership allows us to hold monthly planning meetings to coordinate and optimise our digital marketing programme and campaigns.

During this period, we undertook a significant piece of work to fully review and evaluate our commitment to equality, inclusion, and diversity. A dedicated working group was established to analyse our policies, approaches, and practices. As a result of this work, we agreed and/or implemented the following actions:

- Inclusion of dates commemorating and celebrating LGBTQ+, gender awareness, and trans awareness in our social media calendar.
- Updating volunteer equal opportunities monitoring to include gender and sexuality options on all documentation, with anonymised central records maintained.
- Amending the Volunteer Handbook to include guidance on pronoun usage and updating training materials accordingly.
- Publishing an inclusion statement on our website.
- Organisation-wide discussion on the use of pronouns in email signatures, with agreement that individuals may decide for themselves.
- Continued use of quality marks across the organisation to ensure all criteria are met.

Steve Leighton continued to manage our finances throughout the year, overseeing payroll, budget monitoring, and day-to-day financial operations. He prepares and presents detailed management accounts and cash flow projections at our Board meetings, providing the Board with the financial insight needed to make informed decisions and ensure the ongoing financial stability of the organisation.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

Of course, we cannot overstate the incredible contribution of our dedicated volunteers. Our organisation could not operate as effectively without their commitment and generosity. By freely giving their time, skills, and expertise, they play an essential role in delivering our services and supporting our mission. We greatly value their efforts and recognise the meaningful impact they have on the lives of the people we support and the wider community.

We gratefully acknowledge the financial contribution received from a variety of sources throughout 2024/2025, without which our valuable work could not be delivered or sustained. Funding, grants and donations were most gratefully received from the following:

- Sandwell Children's Trust
- Sandwell Metropolitan Borough Council
- Birmingham City Council
- National Lottery Community Fund
- Tipton Civic Society
- The Albert Gubay Charitable Foundation
- Baron Davenports Charity
- The Roger and Douglas Turner Trust
- Heart of England Community Foundation (Birmingham and Black Country Community Fund)
- The Eveson Trust
- The Tipton and Coseley Building Society Charitable Foundation

Finally, we extend our sincere thanks to Neal and Co Business Services Limited for their guidance, support, and professional advice throughout the year, including the preparation of our annual accounts. Their expertise and assistance have been invaluable in ensuring accurate financial reporting and maintaining the integrity of our financial management.

We remain committed to making independent advocacy available and accessible to those in our community who experience social exclusion or marginalisation. At the heart of advocacy lies a deep commitment to amplifying the voices of people who have been overlooked, silenced, or treated unfairly. This principle continues to guide everything we do at Sandwell Advocacy, and we will steadfastly uphold it in the years ahead. We remain committed to raising awareness of its importance and embedding it into our core principles and values. We sincerely thank everyone who has contributed in any capacity to support our essential work and warmly encourage more volunteers to become part of the organisation.

The trustees' report was approved by the Board of Trustees.



Gurdeep Hanspaul (Chair)

Trustee

Dated: 25 September 2025

SANDWELL CITIZEN ADVOCACY

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF SANDWELL CITIZEN ADVOCACY

I report on the financial statements of the charity for the year ended 31 March 2025, which are set out on pages 8 to 14.

Respective responsibilities of Trustees and examiner

The charity's Trustees are responsible for the preparation of the financial statements. The charity's Trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- (iii) 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 financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

Independent examiner's statement

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
 - (i) to keep accounting records in accordance with section 130 of the 2011 Act; and
 - (ii) to prepare financial statements which accord with the accounting records and comply with the accounting requirements of the 2011 Act;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

Nigel Kirkham FCCA



Chartered Certified Accountant
Shakespeare Buildings
26 Cradley Road
Cradley Heath
West Midlands
B64 6AG

Dated: 25 September 2025

SANDWELL CITIZEN ADVOCACY

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH 2025

	Notes	Unrestricted funds 2025 £	Restricted funds 2025 £	Total 2025 £	Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £
<u>Income from:</u>							
Donations and legacies	2	85,595	144,502	230,097	35,963	187,676	223,639
<u>Expenditure on:</u>							
Charitable activities	3	61,915	145,819	207,734	15,097	194,793	209,890
Net income/(expenditure) for the year/							
Net movement in funds		23,680	(1,317)	22,363	20,866	(7,117)	13,749
Fund balances at 1 April 2024		150,430	1,317	151,747	129,564	8,434	137,998
Fund balances at 31 March 2025		174,110	-	174,110	150,430	1,317	151,747

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

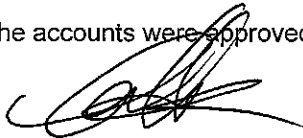
SANDWELL CITIZEN ADVOCACY

BALANCE SHEET

AS AT 31 MARCH 2025

	Notes	2025 £	£	2024 £	£
Current assets					
Debtors	6	2,603		27,270	
Cash at bank and in hand		333,057		277,955	
		<u>335,660</u>		<u>305,225</u>	
Creditors: amounts falling due within one year	7	(161,550)		(153,478)	
Net current assets			<u>174,110</u>		<u>151,747</u>
Income funds					
Restricted funds	9		-		1,317
Unrestricted funds			174,110		150,430
			<u>174,110</u>		<u>151,747</u>

The accounts were approved by the Trustees on 25 September 2025



Gurdeep Hanspaul
Chair

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2025

1 Accounting policies

1.1 Accounting convention

The accounts have been prepared in accordance with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The financial statements have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a true and fair view. This departure has involved following the Statement of Recommended Practice for charities applying FRS 102 rather than the version of the Statement of Recommended Practice which is referred to in the Regulations but which has since been withdrawn.

The financial statements are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention, [modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value]. The principal accounting policies adopted are set out below.

1.2 Going concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

1.4 Incoming resources

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

1 Accounting policies

(Continued)

1.5 Resources expended

Resources expended on charitable activities include all costs incurred in the pursuit of the charitable objects of the charity. Expenditure is recognised when a liability is incurred.

Governance costs include the cost of the independent examination together with the cost of the AGM and the trustees insurance.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Fixtures, fittings & equipment	25% Straight Line
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The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

1.7 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

1.8 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

1.9 Retirement benefits

The pension costs charged in the accounts represent the contributions payable by the charity during the year in accordance with FRS 17: Retirement Benefits.

1.10 Taxation

The charity has been registered for VAT since 1st December 2011. Income and expenditure is shown net of VAT where applicable. Expenditure is shown inclusive of VAT where it is irrecoverable.

The organisation, being a registered charity with minimal trading income, is exempt from tax under Section 505 of Income and Corporation Taxes Act 1988. No provision for taxation is made in these accounts.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

2 Donations and legacies

	Unrestricted funds	Restricted funds	Total	Unrestricted funds	Restricted funds	Total
	2025 £	2025 £	2025 £	2024 £	2024 £	2024 £
Donations and gifts	5,322	-	5,322	10,297	-	10,297
Grants receivable for core activities	80,273	144,502	224,775	25,666	187,676	213,342
	<u>85,595</u>	<u>144,502</u>	<u>230,097</u>	<u>35,963</u>	<u>187,676</u>	<u>223,639</u>

3 Charitable activities

	2025 £	2024 £
Staff costs	165,382	168,968
Provision of advocacy, support and information	40,739	39,328
	<u>206,121</u>	<u>208,296</u>
Share of governance costs	1,613	1,594
	<u>207,734</u>	<u>209,890</u>

4 Trustees

The charity has not at any time entered into any material transactions, contracts or other arrangements with its trustees, employees or any other persons, business, or charities connected with them.

Trustee indemnity insurance has been taken out by the charity at an annual premium of £713 (2024- £694).

5 Employees

The average monthly number employees during the year was 9

2025 Number	2024 Number
<u>7</u>	<u>9</u>

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

5 Employees		(Continued)	
Employment costs		2025 £	2024 £
Wages and salaries		156,634	161,263
Other pension costs		8,748	7,705
		<u>165,382</u>	<u>168,968</u>
There were no employees whose annual remuneration was more than £60,000.			
6 Debtors		2025 £	2024 £
Amounts falling due within one year:			
Trade debtors		499	25,805
Prepayments and accrued income		2,104	1,465
		<u>2,603</u>	<u>27,270</u>
7 Creditors: amounts falling due within one year		2025 £	2024 £
	Notes		
Other taxation and social security		8,489	4,636
Deferred income	8	148,265	144,960
Trade creditors		973	58
Other creditors		848	774
Accruals and deferred income		2,975	3,050
		<u>161,550</u>	<u>153,478</u>

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

8 Deferred income

	2025 £	2024 £
Other deferred income	148,265	144,960
Creative Communities	868	868
SAVE	26,997	30,103
Time for Me	8,453	8,453
BBWS	3,000	1,600
Awards for All - SAVE		19,955
Sandwell Together Befriending	8,857	14,864
Tipton Town Grant	547	547
PAGE	74,528	53,455
Albert Gubway	15,015	15,115
Housing Advocacy Support Service	10,000	-
	148,265	144,960

9 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Balance at 1 April 2024 £	Movement in funds		Balance at 31 March 2025 £
		Incoming Resources £	Expenditure £	
Young Carers	-	88,281	(88,281)	-
Advocacy Feedback Support Service	-	13,892	(13,892)	-
Albert Gubay	1,316	30,322	(31,638)	-
Sandwell Together Befriending Service	-	12,007	(12,007)	-
				-
	1,316	144,502	(145,818)	-

Accounts

SANDWELL CITIZEN ADVOCACY
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2024

SANDWELL CITIZEN ADVOCACY

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Lesley Donnelly (Chair) Pat Golding Geraldine Brown Gurdeep Hanspaul Carmen Tulloch Leah Haynes Yvonne Murray	(Appointed 19 June 2023)
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Charity number	1019779
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Principal address	28 Wood Street Tipton West Midlands DY4 9BQ
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Independent examiner	Neal and Co Business Services Limited Shakespeare Buildings 26 Cradley Road Cradley Heath West Midlands B64 6AG
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Bankers	Unity Trust Bank Plc Nine Brindleyplace 60 Broad Street Birmingham B1 2HB
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SANDWELL CITIZEN ADVOCACY

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SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2024

The Trustees present their report and accounts for the year ended 31 March 2024.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

Objectives and activities

Structure, Governance and Management

The charity whose operational name is "Sandwell Advocacy" is governed by a constitution originally adopted by the members on 26th March 1993 but subsequently amended and adopted at the AGM on 26th June 1996, and further amended at the AGM on 17th November 2011.

The Trustees who served during the year were:

Lesley Donnelly	(Chair)
Patricia Golding	
Geraldine Brown	
Gurdeep Hanspaul	
Carmen Tulloch	
Leah Haynes	
Yvonne Murray	(Appointed 19/06/2023)

The Management Committee is elected annually by the membership and comprises of:

1. at least four members
2. up to three people co-opted by the management committee
3. representatives of active advocates and partners up to a maximum of nine

The committee meets as and when required but not less than once every three months and a quorum of one third of the committee, including an officer is required. Each management committee member whether elected or co-opted has one vote.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

Objectives and Activities

The objectives of the charity are to promote and safeguard the rights and wishes of marginalised and vulnerable individuals within our community. To support people to ensure that they are able to explore avenues open to them, to plan and discuss options and make informed decisions. Ultimately, we aim to empower the people of Sandwell to have more say and control over what happens in their lives, which we feel promotes a more inclusive society.

The aims adopted by the Charity to achieve these objects are as follows:

- a) To assist such people to obtain their full rights as a citizen.
- b) To provide long term personal support.
- c) To provide advocacy support on a one to one basis whether they reside in their own homes, in institutional care, or with relatives.

These aims and objectives will be achieved through provision of both paid and volunteer advocates. Both will receive relevant and appropriate training and support to ensure that they are able to perform their roles effectively.

We refer to those we support as 'advocacy partners' as we feel that our relationship is an equal partnership. The term 'client' or 'service user' are those used by providers of services and often have negative connotations for those who have accessed them.

An advocate will:

- Support the partner in expressing their views, concerns and opinions.
- Speak on behalf of the partner, raising any issues where required, but only as the partner wishes. It is desirable that people regain their own power to speak for themselves where possible. Advocates will support people when they speak for themselves.
- Develop a one to one relationship with a person for as long as the person wishes it to continue.
- Allow the partner to make his or her own decisions and choices whenever possible, even if the process of engagement is slow and uncertain. An advocate ensures that their partner retains maximum control.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

Achievements and Performance.

The period between April 2023 and March 2024 was another busy year for Sandwell Advocacy. The Board of Trustees, staff and volunteers continued to provide valuable independent advocacy support for those in most need in our community. This year was particularly significant for Sandwell Advocacy because we celebrated our 30th Anniversary. We are naturally very proud that we have been providing advocacy throughout Sandwell for so long. This is testimony to our resilience and expertise and demonstrates that we continue to ensure that people's voices are heard and their rights are safeguarded.

We continued our efforts to recruit new members of Management Trustees and this year I was delighted to welcome Yvonne Murray to the Board. Yvonne brings with her a wealth of experience working in the charity sector and will be a valuable asset. Our Board of Trustees are pivotal in managing our governance structures as well as playing a key role in guiding our strategic developments. We continued to take a pro-active approach in terms of furthering our objectives and strategies going forward into this period, our Business Plan was completed and agreed at the beginning of 2023 and subsequently set out our plans and vision for the next three years.

The management Board links directly with Dave Bradshaw, our Chief Executive Officer, who is responsible for managing our staff and services on a day to day basis. Dave brings vision and a wealth of experience to the organisation and maintains a dedicated staff team who are committed and focussed.

We held a 30th anniversary event in November of this year, this was combined with our Annual General Meeting. The event was well attended and included the screening of a film we made where members of the team spoke about what was important to them about advocacy. We also organised an 'advocacy quiz' which made the occasion fun and enjoyable. And who can forget the lovely vegan cakes that were made especially for the occasion complete with Sandwell Advocacy edible logos!

Our Advocacy Project for Young Carers continued throughout this period. We are grateful to Sandwell Children's Trust for funding this much needed project for children, young people and their families for a further 12 months. Helen Charles (Senior Independent Advocate) and Sharon Wilson (Independent Advocate) continued their work on this project providing one to one person-centred advocacy support. In addition to the one-to-one support provided we also organised some group activities as we continued to engage and consult with our User-Engagement Group. A hugely popular well-being and activities workshop was arranged during the summer and we were delighted to partner with 'Believe to Achieve' to deliver this. A further event was held over the Christmas period at the Dorothy Parkes Centre where children and young people, along with parents and carers, came together to take part in a gift making workshop, we combined this with another of our consultation exercises. We thank the staff and volunteers who were involved with these initiatives.

Our Adult Advocacy Support Service was renamed the Advocacy Feedback Support Service during this period which was now grant funded by Sandwell Metropolitan Borough Council. Carol Turley (Advocacy Support Officer) delivered this service in Nursing, Residential, Extra Care settings and those who attend Day Centre Units. This service enables residents in these settings to have a voice, share their experiences and give opinions as to what they would like to see happen in their care settings. We acknowledge the support of a small team of trained volunteers who have assisted us on the delivery of this service. Some additional feedback procedures were adopted during this period whereby family members of residents were invited to complete a questionnaire, this appears to be working well with an increase in responses.

The Sandwell Advocacy Voice and Empowerment (SAVE) Project continued throughout this period. Whilst we saw an end to funding from BBC Children in Need we remained committed to the continuation of this project which has subsequently been funded by a number of grant making Trusts. The SAVE Project provides vital advocacy, enabling and support service for children and young people who are experiencing poor mental health and/or behavioural issues, it empowers them to ensure that their rights are respected and their views and wishes are heard. Our independent advocates Helen Charles and Sharon Wilson provided person-centred support for children and young people on this project.

This period saw us move into year two of our Voices and Choices project. This is a three-year funded project funded by the Albert Gubay Foundation. Helen Charles, our Senior Independent Advocate has taken the lead on this project.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

This project supports older people with long-term health conditions to:

- Ensure that older people wishing to remain/maintain living This project supports older people with long-term health conditions to:
- Ensure that older people wishing to remain/maintain living independently in their own homes with appropriate support can do so.
- Ensure that older people and their families/carers/friends who are considering options around a move into care provider accommodation have access to relevant information and are supported to make informed decisions about their care options.

Our Sandwell Together telephone befriending service continued to go from strength to strength throughout this period. This service recruits and trains volunteer befrienders to provide emotional support and a listening ear for lonely and isolated residents of Sandwell.

Our Business Support Officer, Sharon Jenkins, took temporary responsibility for managing this service until we welcomed Louise Jones as our Volunteer Co-ordinator in September 2023. Following a successful induction period Louise quickly got to grips with all aspects of managing this project with specific attention on:

- Formulating a volunteer recruitment strategy.
- Dealing with volunteer enquiries and managing the application process.
- Promoting the service to a broad range of stakeholders.
- Reviewing our volunteer policies and handbook.
- Training volunteer befrienders.
- Managing referrals into the service and matching these with available volunteers.
- On-going support and supervision for volunteers.

We were particularly successful with our volunteer recruitment efforts during this period and doubled the size of our volunteer team to 30. This has enabled us to expand the range and delivery of this service and increase the support we provide to lonely and isolated residents of Sandwell.

Our Caring for Carers project, funded by Birmingham City Council, continued throughout this year providing support to carers who were experiencing loss and bereavement in Birmingham. This work is delivered in partnership with a number of local health, social care and well-being providers as part of the Communities in Sync consortium. Jade Vaughan continued to deliver this service in her role as Health and Wellbeing Officer until she left us to pursue a career in mental health nursing as this project came to an end in September 2023. Caring for Carers was subsequently replaced by the Birmingham Bereavement and Wellbeing Service, again funded by Birmingham City Council. The support provided was similar to that of the Caring for Carers project but was extended to include anybody who was experiencing loss and bereavement. Helen Charles took over from Jade to deliver this service as Senior Bereavement Officer. Not surprisingly there was a big demand for this service with a high number of referrals being received.

Our Parents Advocacy, Guidance and Empowerment (PAGE) Project continued into its second year during this period. The PAGE Project is funded by the National Lottery to support parents with a learning disability and/or autism who are subject to, or at risk of interventions from Children's Services, by offering a range of support options including independent advocacy and independent living skills training. We worked closely with Ideal for All, another Communities in Sync (CIS) partner organisation, to deliver this project.

PAGE develops a trusting relationship which is user-led and aims to ensure that parents with a learning disability understand proceedings, that they explore their options and avenues and that they are placed at the heart of the decision-making process. Kirsty Kemp continued to deliver this project in her capacity as Independent Advocate, the work has involved some very complex and demanding cases, where parents face the prospect of having their children removed from their care.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

Work commenced during this period to upgrade our website. We commissioned Brand Creative Media to take on this project and worked towards a much more modern user-friendly website. Work on this was completed towards the end of this period and we were delighted with the final product.

Sharon Jenkins continued to provide administrative support to the staff team throughout our many projects. Sharon also supports our CEO with various meetings and administrative duties. Sharon is often the first point of contact for callers and visitors to Sandwell Advocacy, she handles these with confidence and expertise. Sharon has become a vital part of the team and brings immense skills and experience to the role.

Steve Leighton continued to manage our finances throughout this year, including payroll and budget monitoring. Steve provides management accounts and cash flow projections at our Board meetings.

We continued to offer student social worker placements throughout this year. Placements commence in September for 70 days. This year we welcomed Yumna Hussein to the team who joined us and successfully completed her placement.

Of course, we cannot ignore the fantastic work provided by our dedicated team of volunteers. We would not be able to function in the way that we do without the commitment of our volunteers who freely donate their valuable time, skills and experiences. We recognise and value the contribution of all our volunteers and value the difference they make to so many lives of the people they support.

We gratefully acknowledge the financial contribution received from a variety of sources throughout 2023/2024, without which our valuable work could not be delivered or sustained. Funding, grants and donations were most gratefully received from the following:

- Sandwell Children's Trust
- Sandwell Metropolitan Borough Council
- Birmingham City Council
- National Lottery Community Fund
- Tipton Civic Society
- The Albert Gubay Charitable Foundation
- SCVO Vision 2030 Community Micro-Grant
- 29th May 1961 Charity
- Heart of England Community Foundation
- Postcode Neighbourhood Trust
- The Cole Charitable Trust
- The Tipton and Coseley Building Society Charitable Foundation

I would finally like to express my appreciation and thanks to our accountants Neal and Co Business Services Limited for their support, advice and guidance.

We will continue to ensure that independent advocacy is made available and accessible for those who are socially excluded and marginalised within our community. Central to the core value of advocacy is the passionate desire to stand up for the rights and wishes of those who have been ignored, sidelined or discriminated against – as ever, Sandwell Advocacy remains committed to this value.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

The trustees' report was approved by the Board of Trustees.

A handwritten signature in black ink, appearing to read 'L. Donnelly', written in a cursive style.

Lesley Donnelly (Chair)

Trustee

Dated: 13 September 2024

SANDWELL CITIZEN ADVOCACY

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF SANDWELL CITIZEN ADVOCACY

I report on the accounts of the charity for the year ended 31 March 2024, which are set out on pages 8 to 14.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- (i) examine the accounts under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- (iii) 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 next statement.

Independent examiner's statement

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
 - (i) to keep accounting records in accordance with section 130 of the 2011 Act; and
 - (ii) to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Nigel Kirkham FCCA

Chartered Certified Accountant
Shakespeare Buildings
26 Cradley Road
Cradley Heath
West Midlands
B64 6AG

Dated: 13 September 2024

SANDWELL CITIZEN ADVOCACY

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH 2024

	Notes	Unrestricted funds £	Restricted funds £	Total 2024 £	Total 2023 £
<u>Income from:</u>					
Donations and legacies	2	35,963	187,676	223,639	226,636
<u>Expenditure on:</u>					
Charitable activities	3	15,097	194,794	209,891	205,823
Net income/(expenditure) for the year/ Net movement in funds		20,866	(7,118)	13,748	20,813
Fund balances at 1 April 2023		129,564	8,434	137,998	117,185
Fund balances at 31 March 2024		150,430	1,316	151,746	137,998

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

SANDWELL CITIZEN ADVOCACY

BALANCE SHEET

AS AT 31 MARCH 2024

	Notes	2024 £	£	2023 £	£
Current assets					
Debtors	6	27,270		2,134	
Cash at bank and in hand		277,955		232,438	
		<u>305,225</u>		<u>234,572</u>	
Creditors: amounts falling due within one year	7	(153,479)		(96,574)	
Net current assets			<u>151,746</u>		<u>137,998</u>
Income funds					
Restricted funds	9		1,316		8,434
Unrestricted funds			150,430		129,564
			<u>151,746</u>		<u>137,998</u>

The accounts were approved by the Trustees on 13 September 2024



Lesley Donnelly
Chair

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2024

1 Accounting policies

1.1 Accounting convention

The accounts have been prepared in accordance with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The accounts have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a true and fair view. This departure has involved following the Statement of Recommended Practice for charities applying FRS 102 rather than the version of the Statement of Recommended Practice which is referred to in the Regulations but which has since been withdrawn.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The accounts have been prepared under the historical cost convention, modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value. The principal accounting policies adopted are set out below.

1.2 Going concern

At the time of approving the accounts, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the accounts.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

1.4 Incoming resources

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

1 Accounting policies (Continued)

1.5 Resources expended

Resources expended on charitable activities include all costs incurred in the pursuit of the charitable objects of the charity. Expenditure is recognised when a liability is incurred.

Governance costs include the cost of the independent examination together with the cost of the AGM and the trustees insurance.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Fixtures, fittings & equipment	25% Straight Line
--------------------------------	-------------------

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in net income/(expenditure) for the year.

1.7 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

1.8 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

1.9 Retirement benefits

The pension costs charged in the accounts represent the contributions payable by the charity during the year in accordance with FRS 17: Retirement Benefits.

1.10 Taxation

The charity has been registered for VAT since 1st December 2011. Income and expenditure is shown net of VAT where applicable. Expenditure is shown inclusive of VAT where it is irrecoverable.

The organisation, being a registered charity with minimal trading income, is exempt from tax under Section 505 of Income and Corporation Taxes Act 1988. No provision for taxation is made in these accounts.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

2 Donations and legacies

	Unrestricted funds	Restricted funds	Total 2024	Total 2023
	£	£	£	£
Donations and gifts	10,297	-	10,297	8,647
Grants receivable for core activities	25,666	187,676	213,342	217,989
	<u>35,963</u>	<u>187,676</u>	<u>223,639</u>	<u>226,636</u>
For the year ended 31 March 2023	<u>48,318</u>	<u>178,318</u>		<u>226,636</u>

3 Charitable activities

	2024 £	2023 £
Staff costs	168,968	160,431
Provision of advocacy, support and information	39,329	43,814
	<u>208,297</u>	<u>204,245</u>
Share of governance costs	1,594	1,578
	<u>209,891</u>	<u>205,823</u>

4 Trustees

The charity has not at any time entered into any material transactions, contracts or other arrangements with its trustees, employees or any other persons, business, or charities connected with them.

Trustee indemnity insurance has been taken out by the charity at an annual premium of £694 (2023- £678).

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

5 Employees

Number of employees

The average monthly number employees during the year was 9

	2024 Number	2023 Number
	9	9
Employment costs	2024 £	2023 £
Wages and salaries	161,263	153,086
Other pension costs	7,705	7,345
	168,968	160,431

6 Debtors

Amounts falling due within one year:

	2024 £	2023 £
Trade debtors	25,805	429
Prepayments and accrued income	1,465	1,705
	27,270	2,134

7 Creditors: amounts falling due within one year

	Notes	2024 £	2023 £
Other taxation and social security		4,636	9,762
Deferred income	8	144,961	82,504
Trade creditors		58	633
Other creditors		774	808
Accruals and deferred income		3,050	2,867
		153,479	96,574

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

8 Deferred income

	2024 £	2023 £
Other deferred income	144,961	82,504
Creative Communities	868	868
SAVE	30,103	-
Time for Me	8,453	8,975
BBWS	1,600	-
Awards for All - SAVE	19,955	-
Sandwell Together Befriending	14,864	16,071
C4CCC	-	1,666
Tipton Town Grant	548	867
PAGE	53,455	32,922
Albert Gubway	15,115	13,684
Evenson Trust	-	7,451
	144,961	82,504

9 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Balance at 1 April 2023 £	Movement in funds		Balance at 31 March 2024 £
		Incoming Resources £	Expenditure £	
Young Carers	-	79,326	(79,326)	-
Advocacy Feedback Support Service	-	13,892	(13,892)	-
Albert Gubay	6,715	26,069	(31,468)	1,316
SAVE (Children in Need)	-	4,398	(4,398)	-
Caring for Carers	-	-	-	-
Time for Me	-	522	(522)	-
STBS	-	11,207	(11,207)	-
Tipton Town Grant	-	319	(319)	-
BBWS	-	13,118	(13,118)	-
PAGE	1,719	31,375	(33,094)	-
SMBC	-	-	-	-
Eveson Trust	-	7,451	(7,451)	-
	8,434	187,677	(194,795)	1,316

Accounts

SANDWELL CITIZEN ADVOCACY
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023

SANDWELL CITIZEN ADVOCACY

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Lesley Donnelly (Chair) Pat Golding Geraldine Brown Gurdeep Hanspaul Carmen Tulloch Leah Haynes
Charity number	1019779
Principal address	28 Wood Street Tipton West Midlands DY4 9BQ
Independent examiner	Neal and Co Business Services Limited Shakespeare Buildings 26 Cradley Road Cradley Heath West Midlands B64 6AG
Bankers	Unity Trust Bank Plc Nine Brindleyplace 60 Broad Street Birmingham B1 2HB

SANDWELL CITIZEN ADVOCACY

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SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2023

The Trustees present their report and accounts for the year ended 31 March 2023.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

Objectives and activities

Structure, Governance and Management

The charity whose operational name is "Sandwell Advocacy" is governed by a constitution originally adopted by the members on 26th March 1993 but subsequently amended and adopted at the AGM on 26th June 1996, and further amended at the AGM on 17th November 2011.

The Trustees who served during the year were:

Lesley Donnelly (Chair)
Patricia Golding
Geraldine Brown
Gurdeep Hanspaul
Carmen Tulloch
Leah Haynes

The Management Committee is elected annually by the membership and comprises of:

1. at least four members
2. up to three people co-opted by the management committee
3. representatives of active advocates and partners up to a maximum of nine

The committee meets as and when required but not less than once every three months and a quorum of one third of the committee, including an officer is required. Each management committee member whether elected or co-opted has one vote.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Objectives and Activities

The objectives of the charity are to promote and safeguard the rights and wishes of marginalised and vulnerable individuals within our community. To support people to ensure that they are able to explore avenues open to them, to plan and discuss options and make informed decisions. Ultimately, we aim to empower the people of Sandwell to have more say and control over what happens in their lives, which we feel promotes a more inclusive society.

The aims adopted by the Charity to achieve these objects are as follows:

- a) To assist such people to obtain their full rights as a citizen.
- b) To provide long term personal support.
- c) To provide advocacy support on a one to one basis whether they reside in their own homes, in institutional care, or with relatives.

These aims and objectives will be achieved through provision of both paid and volunteer advocates. Both will receive relevant and appropriate training and support to ensure that they are able to perform their roles effectively.

We refer to those we support as 'advocacy partners' as we feel that our relationship is an equal partnership. The term 'client' or 'service user' are those used by providers of services and often have negative connotations for those who have accessed them.

An advocate will:

- Support the partner in expressing their views, concerns and opinions.
- Speak on behalf of the partner, raising any issues where required, but only as the partner wishes. It is desirable that people regain their own power to speak for themselves where possible. Advocates will support people when they speak for themselves.
- Develop a one to one relationship with a person for as long as the person wishes it to continue.
- Allow the partner to make his or her own decisions and choices whenever possible, even if the process of engagement is slow and uncertain. An advocate ensures that their partner retains maximum control.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Achievements and Performance

The period between April 2022 and March 2023 saw us getting back to 'business as usual' as the restrictions associated with the COVID-19 pandemic declined. During this period, we began to look forward with renewed optimism and enthusiasm as we resumed more traditional face to face operations. We did, however, incorporate some of the more innovative ways of engaging with those we support that we had implemented during the pandemic.

The Board of Trustees continued to undertake a significant amount of work strategically on our governance arrangements and business planning. Efforts were also made towards promoting opportunities aimed at encouraging more people to join the Board. However, this was a fairly static period where there were no additions to the board, but at the same time there were no resignations. As ever, we remained pro-active in terms of our objectives and strategies going forward into this period, and we began work on developing our Business Plan for 2023 – 2025. The Business Plan was completed and agreed at the beginning of 2023 and subsequently set out our plans and vision for the next three years.

The operational activities of Sandwell Advocacy are underpinned by the extensive work undertaken by our management team, staff, volunteers and beneficiaries to develop clearly set out aims and objectives. To create our vision for the future, we understand that it is important to involve as many of those with a stake in what we do as part of our engagement and consultation process. We have held regular Away Days to gather the views and feedback of trustees, staff, volunteers and users to inform our strategic and business development model, another of which was held in October 2020. The day was facilitated by an independent consultant, Pamela Hill, from Pamela J Hill Consulting.

Amongst other areas covered during the day we looked at:

- Strengths, Learning Opportunities (Weaknesses), Opportunities and Threats (SWOT Analysis).
- Considering Values - Values in the Workplace.
- Connecting Values to Work.
- Strategic Planning.

Following on from that, we also looked at areas felt to be important as part of the strategic planning process. We agreed five key strategic categories of high importance as follows:

1. Governance
2. People
3. Operations
4. Information and Communication Technology (ICT)
5. Finance

The day was well attended and the findings and feedback from our Away Day formed an integral part of our Business Plan.

Sandwell Advocacy's Annual General Meeting was held in December 2022. We took the opportunity to invite Joe Monaghan from the Coalition of Citizen Advocacy Schemes, to talk about the importance of informal community based advocacy. We also formally launched our Parents, Advocacy Guidance and Empowerment (PAGE) project with presentations from project staff and colleagues from Communities in Sync.

Our Advocacy Project for Young Carers continued throughout this period. We are grateful to Sandwell Children's Trust for funding this much needed project for children, young people and their families for a further 12 months. Helen Charles (Senior Independent Advocate) and Sharon Wilson (Independent Advocate) continued their work on this project providing one to one person-centred advocacy support. We continued to focus on a targeted campaign, of actively promoting the service and developing closer links with a number of local schools throughout this period. This proved hugely successful, and as a result we were able to increase the number of outreach advocacy surgeries and attend a number of school events.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

The Advocacy Project for young carers has a strong user engagement and peer support focus, and as such this group of young people participated in a number of initiatives throughout this period including:

- Working with the artist group 'Laundry' to interpret the huge archive of the Jubilee Arts Digital Library Project and taking part in workshops to produce their own protest art banners. The work produced would later be part of an exhibition later on in 2023.
- Emotional wellbeing workshops delivered throughout the summer of 2022.

Towards the end of this period, Sandwell Children's Trust put this contract out to tender. Naturally, we submitted our tender and were delighted to learn that we were awarded the contract to run throughout the 2023-2024 financial year.

Our Adult Advocacy Support Service gradually returned to more typical operational activities, with the relaxation of COVID restrictions, within nursing and residential care homes, although many of the infection control measures remained in place. Carol Turley (Advocacy Support Officer) delivered this independent service in Nursing, Residential, Extra Care settings and those who attend a Day Centre Units. We have provided this service since 2013 to enable people to have a voice, share their experiences and give opinions as to what they would like to see happen in their care settings. We acknowledge the support of a small team of trained volunteers who have assisted us on the delivery of this service.

We are grateful to Sandwell Metropolitan Borough Council (SMBC) for continuing this service, and were happy to learn that it would be extended for a further 12 months at the beginning of this period. We had further discussions with commissioners at SMBC regarding continuation of this service towards the end of this year. It was subsequently decided that this service would continue as a grant funded service rather than a contracted service and, following successfully applying for the grant we were informed that we would continue delivery throughout 2023-2024. This service would then become known by its revised title of the Advocacy Feedback Support Service.

We were really pleased to receive news from BBC Children in Need that our Sandwell Advocacy Voice and Empowerment (SAVE) Project would be awarded a 12 month funding extension. The SAVE Project provides an vital advocacy, enabling and support service for children and young people who are experiencing poor mental health and/or behavioural issues. It empowers them to ensure that their rights are respected and their views and wishes are heard at all times. Our independent advocates, Helen Charles, Sharon Wilson and Anika Khalid provided person-centred support for children and young people on this project. Along with the one to one support provided, we also organised a number of workshops and group activities aimed at improving the emotional wellbeing of those accessing the service; it also provided a crucial means of peer support. Anika Khalid continued to work on this project until she left to pursue a career in social work in August 2022.

Despite having received funding support to deliver this vital service from BBC Children in Need for the previous four years, we were bitterly disappointed to learn that they would not continue to support this work beyond March 2023. Despite this the Board of Trustees agreed unanimously that there was huge continued need for this service from young people in Sandwell, and that it would therefore continue beyond that date. We resolved that make a concerted effort to secure funding from other sources to ensure this work continues.

We were equally disappointed that we were unable to secure continuation funding for our Voices and Choices Project following conclusion of funding from the Lloyds Bank Foundation over the previous three years. Sadly, our Voices and Choices Project Officer, Linsey Robinson, left us to move on to pastures new in April 2022. Nevertheless we regrouped and doubled our efforts to secure the necessary income to continue this work and were delighted to be awarded funding to do so from the Albert Gubay Foundation for a period of three years commencing September 2022. Helen Charles, our Senior Independent Advocate, stepped in to take the lead on this project with the support of Anika Khalid.

This project supports older people with long-term health conditions to:

- Ensure that older people wishing to remain/maintain living independently in their own homes with appropriate support are able to do so.
- Ensure that older people and their families/carers/friends who are considering options around a move into care provider accommodation have access to relevant information and are supported to make informed decisions about their care options.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Our Sandwell Together telephone befriending service continued to go from strength to strength throughout this period. This service recruits and trains volunteer befrienders to provide emotional support and a listening ear for lonely and isolated residents of Sandwell. Whilst this service had been established at the outset of the COVID-19 pandemic, we made the decision to continue providing this service in spite of the relaxation of lockdown measures. We felt that loneliness and isolation would remain and residents more generally were still in need of a listening ear and someone to talk to.

Juanita Williams continued in her role as Volunteer Development Officer with Sandwell Together until her retirement in July 2022. We thank Juanita for her dedication and hard work on this and other projects during her time with Sandwell Advocacy and wish her well in her retirement. Our Business Support Officer, Sharon Jenkins, took temporary responsibility for managing this service for the remainder of this period.

Our Caring for Carers project continued throughout this year, providing support to carers who were experiencing loss and bereavement in Birmingham. This work is delivered in partnership with a number of local health, social care and well-being providers as part of the Communities in Sync consortium. In addition to the one to one support provided by this service, 'Compassionate Communities' group work was also introduced. This provides training to enable individuals to become Compassionate Communities Connectors, to improve social connectedness and improve the wellbeing of people in their communities. Helen Charles and Juanita Williams delivered this project throughout this year, and we were really happy to welcome Jade Vaughan to the team in December 2022 following Juanita's retirement. We were pleased to receive notification that the funding for this project from Birmingham City Council had been extended until November 2023.

A major development in our history came to fruition during this year, with the introduction of our Parents Advocacy, Guidance and Empowerment (PAGE) Project. We wanted to establish the PAGE Project to support parents with a learning disability and/or autism who are subject to, or at risk of interventions from Children's Services, by offering a range of support options including independent advocacy and independent living skills training. We worked extensively with partners in the Communities in Sync (CIS) consortium, to develop the service specification for this project and under the auspices of CIS. We agreed to work with another CIS partner organisation, Ideal for All (IFA are a local user-led charity providing a range of support services for disabled and disadvantaged people), to source and secure the necessary funding to establish this project.

We were absolutely thrilled to discover that our three year funding bid to the National Lottery had been approved and subsequently the PAGE Project commenced in September 2022. Sandwell Advocacy would provide an Independent Advocate to develop a trusted relationship which is user-led, and will aim to ensure that parents with a learning disability understand proceedings, that they explore their options and avenues and that they are placed at the heart of the decision-making process. IFA would provide the Independent Living Skills Officer, to provide community based living skills support through a range of practical and hands on one to one and group sessions, with an emphasis on early help and prevention. We welcomed Kirsty Kemp who joined us as Independent Advocate on this project in September 2022.

Thanks to funding from The Eveson Trust we were also able to introduce a pilot advocacy service for young adult carers aged 18-25 during this year. We subsequently named this our Flourish Project. The Flourish Project will enable us to test the demand and effectiveness of providing a small scale advocacy service for young adult carers who are in transition from children's to adult services. We hope to use the data, feedback and lessons from this pilot to scale up to a larger scale project over time.

Sharon Jenkins continued to provide much needed administrative support to the staff team throughout our many projects during this year. Sharon has made the role her own and can always be relied upon to support our CEO and staff team with various meetings and administrative duties. As previously mentioned, Sharon also ably stepped up to take on the management of our Sandwell Together befriending service for the majority of this year.

Steve Leighton continued to manage our finances throughout this year, including payroll and budget monitoring. Steve provides management accounts and cash flow projections at meetings of our Trustees.

We continued to offer student social worker placements throughout this year. Placements commence in September and continue for 70 days. This year we welcomed Pauline Hector to the team who joined us and successfully completed her placement.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

Any Trustees' Report would not be complete without sending a message of appreciation to our wonderful dedicated team of volunteers. Our volunteers devote their time freely to support vulnerable and marginalised individuals within our community and ensure that residents have a voice when planning and/or delivering services. Our team of volunteers are an inspiration to the Board and staff team here at Sandwell Advocacy, and it is heartening to see that they make a meaningful difference by giving so many people a voice.

Last but not least I would like to extend a special thank you from all of the Board to our CEO, Dave Bradshaw, who is responsible for the day to day operations of Sandwell Advocacy, as well as working closely with the Board to develop our strategic vision for the future. Special congratulations to Dave for completing 20 years' service with Sandwell Advocacy in July of this year.

We gratefully acknowledge the financial contribution received from a variety of sources throughout 2021/2022, without which our valuable work could not be delivered or sustained. Funding, grants and donations were most gratefully received from the following:

- Sandwell Children's Trust
- Sandwell Metropolitan Borough Council
- BBC Children in Need
- Birmingham City Council
- The Asda Green Token Scheme
- National Lottery Community Fund
- Tipton Civic Society
- The Albert Gubay Charitable Foundation
- Alfred Haines Charitable Trust
- Arnold Clark Fund
- SCVO Positive Mental Health Micro-Grant
- Edward Cadbury Trust
- National Lottery Awards for All
- The Eveson Trust
- Tesco Community Grant
- The Tipton and Coseley Building Society Charitable Foundation
- Edgar E Lawley Foundation
- Charles Hayward Foundation

I would finally like to express my appreciation and thanks to our accountants Neal and Co Business Services Limited for their support, advice and guidance.

As always, Sandwell Advocacy is dedicated and committed to continuing our work, to build on our strengths and to support people to develop their confidence, feel more empowered and find a voice.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

The trustees' report was approved by the Board of Trustees.

A handwritten signature in black ink, appearing to read 'L. Donnelly', written in a cursive style.

Lesley Donnelly (Chair)

Trustee

Dated: 7 September 2023

SANDWELL CITIZEN ADVOCACY

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF SANDWELL CITIZEN ADVOCACY

I report on the accounts of the charity for the year ended 31 March 2023, which are set out on pages 9 to 16.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- (i) examine the accounts under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- (iii) 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 next statement.

Independent examiner's qualified statement

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
 - (i) to keep accounting records in accordance with section 130 of the 2011 Act; and
 - (ii) to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Nigel Kirkham FCCA

Chartered Certified Accountant
Shakespeare Buildings
26 Cradley Road
Cradley Heath
West Midlands
B64 6AG

Dated: 7 September 2023

SANDWELL CITIZEN ADVOCACY

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2023

	Notes	Unrestricted funds £	Restricted funds £	Total 2023 £	Total 2022 £
<u>Income from:</u>					
Donations and legacies	2	48,318	178,318	226,636	230,445
<u>Expenditure on:</u>					
Charitable activities	3	35,939	169,884	205,823	229,464
Net income for the year/ Net movement in funds		12,379	8,434	20,813	981
Fund balances at 1 April 2022		117,185	-	117,185	116,204
Fund balances at 31 March 2023		129,564	8,434	137,998	117,185

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

SANDWELL CITIZEN ADVOCACY

BALANCE SHEET

AS AT 31 MARCH 2023

	Notes	2023 £	£	2022 £	£
Current assets					
Debtors	6	2,134		1,236	
Cash at bank and in hand		232,438		150,128	
		<u>234,572</u>		<u>151,364</u>	
Creditors: amounts falling due within one year	7	(96,574)		(34,179)	
Net current assets			<u>137,998</u>		<u>117,185</u>
Income funds					
Restricted funds	9		8,434		-
Unrestricted funds			<u>129,564</u>		<u>117,185</u>
			<u>137,998</u>		<u>117,185</u>

The accounts were approved by the Trustees on 7 September 2023



Lesley Donnelly
Chair

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies

1.1 Accounting convention

The accounts have been prepared in accordance with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The accounts have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a true and fair view. This departure has involved following the Statement of Recommended Practice for charities applying FRS 102 rather than the version of the Statement of Recommended Practice which is referred to in the Regulations but which has since been withdrawn.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The accounts have been prepared under the historical cost convention, modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value. The principal accounting policies adopted are set out below.

1.2 Going concern

At the time of approving the accounts, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the accounts.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

1.4 Incoming resources

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies (Continued)

1.5 Resources expended

Resources expended on charitable activities include all costs incurred in the pursuit of the charitable objects of the charity. Expenditure is recognised when a liability is incurred.

Governance costs include the cost of the independent examination together with the cost of the AGM and the trustees insurance.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Fixtures, fittings & equipment	25% Straight Line
--------------------------------	-------------------

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in net income/(expenditure) for the year.

1.7 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

1.8 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

1.9 Retirement benefits

The pension costs charged in the accounts represent the contributions payable by the charity during the year in accordance with FRS 17: Retirement Benefits.

1.10 Taxation

The charity is has been registered for VAT since 1st December 2011. Income and expenditure is shown net of VAT where applicable. Expenditure is shown inclusive of VAT where it is irrecoverable.

The organisation, being a registered charity with minimal trading income, is exempt from tax under Section 505 of Income and Corporation Taxes Act 1988. No provision for taxation is made in these accounts.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

2 Donations and legacies

	Unrestricted funds	Restricted funds	Total 2023	Total 2022
	£	£	£	£
Donations and gifts	8,647	-	8,647	8,883
Grants receivable for core activities	39,671	178,318	217,989	221,562
	<u>48,318</u>	<u>178,318</u>	<u>226,636</u>	<u>230,445</u>
For the year ended 31 March 2022	<u>33,182</u>	<u>197,263</u>		<u>230,445</u>

3 Charitable activities

	2023 £	2022 £
Staff costs	160,431	175,989
Provision of advocacy, support and information	<u>43,814</u>	<u>52,005</u>
	204,245	227,994
Share of governance costs	<u>1,578</u>	<u>1,470</u>
	<u>205,823</u>	<u>229,464</u>

4 Trustees

The charity has not at any time entered into any material transactions, contracts or other arrangements with its trustees, employees or any other persons, business, or charities connected with them.

Trustee indemnity insurance has been taken out by the charity at an annual premium of £828 (2022- £580).

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

5 Employees

Number of employees

The average monthly number employees during the year was 6

2023 Number	2022 Number
9	6

Employment costs

	2023 £	2022 £
Wages and salaries	153,086	168,201
Other pension costs	7,345	7,788
	160,431	175,989

6 Debtors

	2023 £	2022 £
Amounts falling due within one year:		
Trade debtors	429	1,236
Prepayments and accrued income	1,705	-
	2,134	1,236

7 Creditors: amounts falling due within one year

	Notes	2023 £	2022 £
Other taxation and social security		9,762	4,549
Deferred income	8	82,504	25,970
Trade creditors		633	1,157
Other creditors		808	823
Accruals and deferred income		2,867	1,680
		96,574	34,179

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

8 Deferred income

	2023 £	2022 £
Other deferred income	82,504	25,970
Creative Communities	868	868
SAVE (BBC CIN)	-	2,477
Caring for Carers	-	287
Time for Me	8,975	9,243
Sandwell Together Befriending	16,071	7,120
C4CCC	1,666	3,237
Tipton Town Grant	867	2,738
PAGE	32,922	-
Albert Gubway	13,684	-
Evenson Trust	7,451	-
	82,504	25,970

9 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Balance at 1 April 2022 £	Movement in funds		Balance at 31 March 2023 £
		Incoming Resources £	Expenditure £	
Young Carers	-	88,281	(88,281)	-
Adults Advocacy Support Service	-	12,658	(12,658)	-
Voices and Choices	-	13,316	(6,601)	6,715
SAVE (Children in Need)	-	33,807	(33,807)	-
Caring for Carers	-	287	(287)	-
Time for Me	-	269	(269)	-
STBS	-	6,989	(6,989)	-
Tipton Town Grant	-	1,871	(1,871)	-
Volunteers week	-	500	(500)	-
PAGE	-	19,491	(17,772)	1,719
SMBC	-	300	(300)	-
Eveson Trust	-	549	(549)	-
	-	178,318	(169,884)	(8,434)

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

10 Analysis of net assets between funds

	Unrestricted £	Restricted £	Total £
Fund balances at 31 March 2023 are represented by:			
Current assets/(liabilities)	129,564	8,434	137,998
	<u>129,564</u>	<u>8,434</u>	<u>137,998</u>

Accounts

Charity Registration No. 1019779

**SANDWELL CITIZEN ADVOCACY
ANNUAL REPORT AND UNAUDITED
FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2022**

SANDWELL CITIZEN ADVOCACY

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Lesley Donnelly (Chair) Pat Golding Geraldine Brown Gurdeep Hanspaul Carmen Tulloch Leah Haynes (Appointed 31 March 2022)
Charlty number	1019779
Principal address	28 Wood Street Tipton West Midlands DY4 9BQ
Independent examlner	Neal and Co Business Services Limited Shakespeare Buildings 26 Cradley Road Cradley Heath West Midlands B64 6AG
Bankers	Unity Trust Bank Plc Nine Brindleyplace 60 Broad Street Birmingham B1 2HB

SANDWELL CITIZEN ADVOCACY

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SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2022

The Trustees present their report and accounts for the year ended 31 March 2022.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

Objectives and activities

Structure, Governance and Management

The charity whose operational name is "Sandwell Advocacy" is governed by a constitution originally adopted by the members on 26th March 1993 but subsequently amended and adopted at the AGM on 26th June 1996, and further amended at the AGM on 17th November 2011.

The Trustees who served during the year were:

Lesley Donnelly	(Chair)
Patricia Golding	
Geraldine Brown	
Andrew Lester	(Resigned 22/04/2021)
Jodie McCaughan	(Resigned 10/02/2022)
Gurdeep Hanspaul	
Carmen Tulloch	
Masud Siddique	(Appointed 21/10/2021, Resigned 13/02/2022)
Leah Haynes	(Appointed 31/03/2022)

The Management Committee is elected annually by the membership and comprises of:

1. at least four members
2. up to three people co-opted by the management committee
3. representatives of active advocates and partners up to a maximum of nine

The committee meets as and when required but not less than once every three months and a quorum of one third of the committee, including an officer is required. Each management committee member whether elected or co-opted has one vote.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

Objectives and Activities

The objectives of the charity are to promote and safeguard the rights and wishes of marginalised and vulnerable individuals within our community. To support people to ensure that they are able to explore avenues open to them, to plan and discuss options and make informed decisions. Ultimately, we aim to empower the people of Sandwell to have more say and control over what happens in their lives, which we feel promotes a more inclusive society.

The aims adopted by the Charity to achieve these objects are as follows:

- a) To assist such people to obtain their full rights as a citizen.
- b) To provide long term personal support.
- c) To provide advocacy support on a one to one basis whether they reside in their own homes, in institutional care, or with relatives.

These aims and objectives will be achieved through provision of both paid and volunteer advocates. Both will receive relevant and appropriate training and support to ensure that they are able to perform their roles effectively.

We refer to those we support as 'advocacy partners' as we feel that our relationship is an equal partnership. The term 'client' or 'service user' are those used by providers of services and often have negative connotations for those who have accessed them.

An advocate will:

- Support the partner in expressing their views, concerns and opinions.
- Speak on behalf of the partner, raising any issues where required, but only as the partner wishes. It is desirable that people regain their own power to speak for themselves where possible. Advocates will support people when they speak for themselves.
- Develop a one to one relationship with a person for as long as the person wishes it to continue.
- Allow the partner to make his or her own decisions and choices whenever possible, even if the process of engagement is slow and uncertain. An advocate ensures that their partner retains maximum control.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

Achievements and Performance

The period between April 2021 and March 2022 saw us gradually emerging from the COVID-19 pandemic as we looked to return to some semblance of normality. As with most organisations in the voluntary sector, Sandwell Advocacy had faced an extremely challenging time. But, as ever, the team responded to whatever came their way with great resilience, creativity and dedication. It is a true indication of how resourceful and innovative a team of people can be when faced with their greatest challenges, as ever, the team at Sandwell Advocacy were not to be found wanting.

As things began to recover from COVID lockdowns we implemented a structured reset and recovery plan to make sure we were well prepared for a return to what was referred to as the 'new normal'. Whilst we were keen to get back to more traditional face to face operations we incorporated some of the more innovative ways of engaging with those we support that we had implemented during lockdown. Our return back to office-based working was carefully managed and risk assessed to maintain effective Infection control measures and to keep staff and those we work with safe.

The board of trustees continued to undertake a significant amount of work strategically on our governance arrangements and business planning. We agreed and put in place a Business Plan for 2020-2023 with clearly set vision, objectives and strategies for taking the organisation forward. As part of this work we were keen to build on the work we had completed on our trustee recruitment strategy and the development of a Trustee Welcome Pack. As a result of this we felt that we were in a better position to highlight the kind of skills and experience we required as well as being better able to promote opportunities to prospective trustees. We were therefore delighted to welcome Leah Haynes to the Board as part of our on-going recruitment strategy. Sadly we bid farewell to two long-standing Board members in Andy Lester and Jodie McCaughan during this time, both departed with our best wishes.

As part of our commitment to ensuring that our trustees are well prepared for their role we conducted a full review of our trustee induction procedures. These were significantly improved during this time to reflect a more comprehensive and structured process. We also introduced on-line 'Safeguarding for Trustees' training that all members of the board are now expected to complete to ensure that they are meeting their duties and responsibilities.

Our Advocacy Project for Young Carers continued throughout this period. We are grateful to Sandwell Children's Trust for funding this much needed project for children, young people and their families for a further 12 months. Helen Charles, Juanita Williams and Sharon Wilson continued their work on this project providing one to one person-centred advocacy support. We continued to enhance the one to one model of support through a number of engagement events and activities with groups of children and young people including:

- Virtual Talk Therapy Workshops.
- Balloon crafting workshops.
- Engaged with Healthwatch Sandwell as part of their Carers Consultation.
- Healthy Eating and Cooking sessions in partnership with Ideal for All.

The team focussed on a targeted campaign of actively promoting the service and developing closer links with a number of local schools throughout this period. This proved hugely successful and as a result we were able to set up outreach advocacy surgeries and attend a number of parent's evenings. This enabled more young people to access the support we offer, particularly harder to reach young people such as hidden young carers and those from South Asian and Eastern European communities. In addition to this we also consulted with all of the children and young people that had accessed our service via a Survey Monkey questionnaire. We had a fantastic response and the information we gleaned from them informed future planning and activities for this project.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

Our Adult Advocacy Support Service was arguably worst impacted by the COVID-19 pandemic but continued against very difficult odds utilising a range of virtual methods. Carol Turley delivered this project to support individuals in nursing/residential care, Extra Care Scheme's and Day Centre settings using creative and flexible approaches within government COVID-19 guidelines. Gradually physical visits to care providers were able to resume as restrictions eased, which made way for face to face interventions where residents were given a vital opportunity to share their experiences and have a voice.

Our Sandwell Advocacy Voice and Empowerment (SAVE) Project funded by BBC Children in Need continued into its final year of the current funding cycle. The SAVE Project provides an advocacy, enabling and support service for children and young people who are experiencing poor mental health and/or behavioural issues that empowers them to ensure that their rights are respected and their views and wishes are heard at all times. Helen Charles and Nazia Yousaf provided independent advocacy support on SAVE. Continuation funding was sought from Children in Need towards the end of this period and we were delighted when a further twelve month extension had been confirmed. We bid farewell to Nazia Yousaf during this period and Sharon Wilson replaced her as Independent Advocate.

Our Voices and Choices Project funded by the Lloyds Bank Foundation entered its final year of the current funding cycle during this period. Linsey Robinson provided advocacy support for older people with their care and accommodation issues. This project supports older people with long-term health conditions to:

- Ensure that older people wishing to remain/maintain living independently in their own homes with appropriate support are able to do so.
- Ensure that older people and their families/carers/friends who are considering options around a move into care provider accommodation have access to relevant information and are supported to make informed decisions about their care options.

It was extremely disappointing that, despite great efforts to secure continuation funding for this much needed project, we were not successful in securing the funding required. It was therefore with great sadness that we had to say farewell to Linsey Robinson as she moved on to pastures new.

We built on the magnificent success of our Sandwell Together telephone befriending service throughout this period. This service had been established at the outset of the COVID-19 pandemic and whilst the direct impact of the pandemic diminished as we emerged from lockdown, volunteer befrienders continued to provide emotional support for people who remained isolated and lonely. In spite of the relaxation of lockdown measures loneliness and isolation would remain and residents more generally were still in need of a listening ear and someone to talk to. Juanita Williams continued in her role as Volunteer Development Officer and implemented a more structured approach to involving volunteers in the service including: volunteer recruitment, volunteer training and on-going volunteer support. We continued to receive a steady stream of referrals and subsequently matched these with available volunteers. We estimate that our volunteer befrienders made in excess of 3000 hours of calls during this period which is a staggering commitment. We commissioned an independent evaluation of this service which took place over July and August of this year and published towards the end of 2021. The evaluation highlighted the many positive aspects of the service, not only for those who received the calls, but also for the volunteers themselves who reported on the significant benefits that they got from their role.

Our Caring for Carers project continued throughout this period supporting carers through loss and bereavement in Birmingham. This work is delivered in partnership with a number of local health, social care and well-being providers as part of the Communities in Sync consortium. In addition to the one to one support provided by this service, 'Compassionate Communities' group work was also introduced. This provides training to enable individuals to become Compassionate Communities Connectors to improve social connectedness and improve the wellbeing of people in their communities.

In February of 2021 we welcomed Sharon Jenkins as our new Business Support Officer. Sharon continued to provide valuable administrative support to the staff team throughout our many projects. Sharon has become a vital part of the team and brings immense skills and experience to the role.

Steve Leighton continued to manage our finances throughout this period, including payroll and budget monitoring. Steve continued to provide management accounts and cash flow projections at meetings of our trustees.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

We continued to offer student social worker placements throughout this period. Placements commence in September and continue for 70 days. This year we welcomed Anika Khalid to the team who joined us on placement. Anika subsequently remained with us following her placement to provide paid sessional work. We were also able to offer a work experience placement as part of the government's Kickstart Scheme. This scheme provided a paid work experience placement for 25 hours per week for a total of six months to provide work experience and improve the employability of young unemployed individuals. We were pleased to welcome Halimah Shazady to the team as part of this scheme, Halimah went on to secure full time employment following on from her placement with us.

A special mention goes out to the team of volunteers who devote their time and commitment to supporting our work. Volunteers have always been a cornerstone of Sandwell Advocacy without which we truly could not function as an organisation. We really do recognise and appreciate the time, skills and experience that our volunteers bring to Sandwell Advocacy. I would like to formally acknowledge the work of all our volunteers for making a meaningful difference to people's lives.

We gratefully acknowledge the financial contribution received from a variety of sources throughout 2021/2022, without which our valuable work could not be delivered or sustained. Funding, grants and donations were most gratefully received from the following:

- Sandwell Children's Trust
- Sandwell Metropolitan Borough Council
- BBC Children in Need
- Birmingham City Council
- Lloyds Bank Foundation
- SMBC Community Partnership Innovation Fund
- SCVO Vision 2030 Community Grant
- National Lottery Community Fund
- Alfred Haines Charitable Trust
- Tipton Town Team
- The Asda Foundation
- Tipton Civic Society
- The Tipton and Coseley Building Society Charitable Foundation
- Baron Davenport's Charity

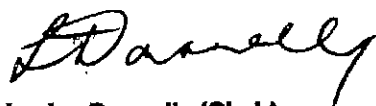
The financial year has seen an increase in operational levels and improvements to our financial status compared to the previous year. This is testament to the dedication and hard work of our staff team and volunteers, ably managed by Dave Bradshaw our Chief Executive Officer, along with the continued commitment of our management team. We will continue to develop and improve the services we offer going forward to meet the needs of those in most need.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

The trustees' report was approved by the Board of Trustees.



Lesley Donnelly (Chair)

Trustee

Dated: 3 November 2022

SANDWELL CITIZEN ADVOCACY

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF SANDWELL CITIZEN ADVOCACY

I report on the accounts of the charity for the year ended 31 March 2022, which are set out on pages 8 to 15.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- (i) examine the accounts under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- (iii) 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 next statement.

Independent examiner's statement

Your attention is drawn to the fact that the charity has prepared accounts in accordance with 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) in preference to the Accounting and Reporting by Charities: Statement of Recommended Practice issued on 1 April 2005 which is referred to in the extant regulations but has now been withdrawn.

I understand that this has been done in order for the accounts to provide a true and fair view in accordance with Generally Accepted Accounting Practice effective for reporting periods beginning on or after 1 January 2015.

In connection with my examination, no other matter except that referred to in the previous paragraph has come to my attention:

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
 - (i) to keep accounting records in accordance with section 130 of the 2011 Act; and
 - (ii) to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Nigel Kirkham FCCA



Chartered Certified Accountant
Shakespeare Buildings
26 Cradley Road
Cradley Heath
West Midlands
B64 6AG

Dated: 3 November 2022

SANDWELL CITIZEN ADVOCACY

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH 2022

	Notes	Unrestricted funds £	Restricted funds £	Total 2022 £	Total 2021 £
<u>Income and endowments from:</u>					
Donations and legacies	2	33,182	197,263	230,445	235,183
Other income	3	-	-	-	4,000
Total Income		33,182	197,263	230,445	239,183
<u>Expenditure on:</u>					
Charitable activities	4	24,661	204,803	229,464	212,800
Net incoming/(outgoing) resources before transfers		8,521	(7,540)	981	26,383
Gross transfers between funds		(4,628)	4,628	-	-
Net Income/(expenditure) for the year/ Net movement in funds		3,893	(2,912)	981	26,383
Fund balances at 1 April 2021		113,292	2,912	116,204	89,821
Fund balances at 31 March 2022		117,185	-	117,185	116,204

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

SANDWELL CITIZEN ADVOCACY

BALANCE SHEET

AS AT 31 MARCH 2022

	Notes	2022 £	£	2021 £	£
Current assets					
Debtors	7	1,236		10,024	
Cash at bank and in hand		150,128		174,376	
		<u>151,364</u>		<u>184,400</u>	
Creditors: amounts falling due within one year	8	<u>(34,179)</u>		<u>(68,196)</u>	
Net current assets			<u>117,185</u>		<u>116,204</u>
Income funds					
Restricted funds	10	-		2,912	
Unrestricted funds			<u>117,185</u>	<u>113,292</u>	
			<u>117,185</u>	<u>116,204</u>	

The accounts were approved by the Trustees on 3 November 2022


Lesley Donnelly
Chair

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2022

1 Accounting policies

1.1 Accounting convention

The accounts have been prepared in accordance with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The accounts have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a true and fair view. This departure has involved following the Statement of Recommended Practice for charities applying FRS 102 rather than the version of the Statement of Recommended Practice which is referred to in the Regulations but which has since been withdrawn.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The accounts have been prepared under the historical cost convention, modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value. The principal accounting policies adopted are set out below.

1.2 Going concern

At the time of approving the accounts, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the accounts.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

1.4 Incoming resources

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

1 Accounting policies

(Continued)

1.5 Resources expended

Resources expended on charitable activities include all costs incurred in the pursuit of the charitable objects of the charity. Expenditure is recognised when a liability is incurred.

Governance costs include the cost of the independent examination together with the cost of the AGM and the trustees insurance.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Fixtures, fittings & equipment	25% Straight Line
--------------------------------	-------------------

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in net income/(expenditure) for the year.

1.7 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

1.8 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

1.9 Retirement benefits

The pension costs charged in the accounts represent the contributions payable by the charity during the year in accordance with FRS 17: Retirement Benefits.

1.10 Taxation

The charity has been registered for VAT since 1st December 2011. Income and expenditure is shown net of VAT where applicable. Expenditure is shown inclusive of VAT where it is irrecoverable.

The organisation, being a registered charity with minimal trading income, is exempt from tax under Section 505 of Income and Corporation Taxes Act 1988. No provision for taxation is made in these accounts.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

2 Donations and legacies

	Unrestricted funds	Restricted funds	Total 2022	Total 2021
	£	£	£	£
Donations and gifts	8,883	-	8,883	5,816
Grants receivable for core activities	24,299	197,263	221,562	229,367
	<u>33,182</u>	<u>197,263</u>	<u>230,445</u>	<u>235,183</u>
For the year ended 31 March 2021	<u>13,866</u>	<u>221,317</u>		<u>235,183</u>

3 Other income

	2022	2021
	£	£
Other income	-	4,000

4 Charitable activities

	2022	2021
	£	£
Staff costs	175,989	148,570
Provision of advocacy, support and information	52,005	62,780
	<u>227,994</u>	<u>211,350</u>
Share of governance costs	1,470	1,450
	<u>229,464</u>	<u>212,800</u>

5 Trustees

The charity has not at any time entered into any material transactions, contracts or other arrangements with its trustees, employees or any other persons, business, or charities connected with them.

Trustee indemnity insurance has been taken out by the charity at an annual premium of £580 (2021- £550).

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

6 Employees

Number of employees

The average monthly number employees during the year was 6

2022 Number	2021 Number
6	6

Employment costs

	2022 £	2021 £
Wages and salaries	168,201	142,045
Other pension costs	7,788	6,525
	<u>175,989</u>	<u>148,570</u>

7 Debtors

	2022 £	2021 £
Amounts falling due within one year:		
Trade debtors	<u>1,236</u>	<u>10,024</u>

8 Creditors: amounts falling due within one year

	Notes	2022 £	2021 £
Other taxation and social security		4,549	4,066
Deferred income	9	25,970	61,448
Trade creditors		1,157	334
Other creditors		823	728
Accruals and deferred income		1,680	1,620
		<u>34,179</u>	<u>68,196</u>

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

9 Deferred Income

	2022 £	2021 £
Other deferred income	25,970	61,448
Creative Communities	868	2,068
Lloyds Bank Foundation	-	21,253
Within Living Memory	-	98
SAVE (BBC CIN)	2,477	-
Caring for Carers	287	-
Time for Me	9,243	9,415
SAVE	-	1,376
React Fund	-	1,274
Community Initiatives	-	4,197
Doing Things Differently	-	1,415
Vision 2030	-	4,738
COVID-19 Booster Programme	-	614
Our Commonwealth	-	15,000
Sandwell Together Befriending	7,120	-
C4CCC	3,237	-
Tipton Town Grant	2,738	-
	25,970	61,448

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

10 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Balance at 1 April 2021	Movement in funds		Balance at 31 March 2022
	£	Incoming Resources	Expenditure	£
Young Carers	2,912	88,281	(91,193)	-
Adults Advocacy Support Service		12,658	(12,658)	-
Voices and Choices		21,253	(21,253)	-
SAVE (Children in Need)		29,729	(29,729)	-
C4CCC		8,763	(8,763)	-
Caring for Carers		16,289	(16,289)	-
Time for Me		172	(172)	-
React Fund		1,274	(1,274)	-
Community Initiative Fund		4,197	(4,197)	-
Doing things differently		1,415	(1,415)	-
Vision 2030		4,738	(4,738)	-
COVID-19 Booster		614	(614)	-
STBS		7,880	(7,880)	-
	<u>2,912</u>	<u>197,263</u>	<u>200,175</u>	<u>-</u>

Accounts

SANDWELL CITIZEN ADVOCACY
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2021

SANDWELL CITIZEN ADVOCACY

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees

Lesley Donnelly (Chair)

Pat Golding

Geraldine Brown

Andrew Lester

Jodie McCaughan

G Hanspaul

(Appointed 26 November
2020)

C Tulloch

(Appointed 28 January
2021)

Charity number

1019779

Principal address

28 Wood Street

Tipton

West Midlands

DY4 9BQ

Independent examiner

Neal and Co Business Services Limited

Shakespeare Buildings

26 Cradley Road

Cradley Heath

West Midlands

B64 6AG

Bankers

Unity Trust Bank Plc

Nine Brindleyplace

60 Broad Street

Birmingham

B1 2HB

SANDWELL CITIZEN ADVOCACY

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Balance sheet	10
Notes to the accounts	11 - 16

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT

FOR THE YEAR ENDED 31 MARCH 2021

The Trustees present their report and accounts for the year ended 31 March 2021.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

Objectives and activities

Structure, Governance and Management

The charity whose operational name is "Sandwell Advocacy" is governed by a constitution originally adopted by the members on 26th March 1993 but subsequently amended and adopted at the AGM on 26th June 1996, and further amended at the AGM on 17th November 2011.

The Trustees who served during the year were:

Lesley Donnelly	(Chair)
Ann Thomas	(Resigned 26/11/2020)
Patricia Golding	
Geraldine Brown	
Andrew Lester	
Jodie McCaughan	
Gurdeep Hanspaul	(Appointed 26/11/2020)
Carmen Tulloch	(Appointed 28/01/2021)

The Management Committee is elected annually by the membership and comprises of:

1. at least four members
2. up to three people co-opted by the management committee
3. representatives of active advocates and partners up to a maximum of nine

The committee meets as and when required but not less than once every three months and a quorum of one third of the committee, including an officer is required. Each management committee member whether elected or co-opted has one vote.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

Objectives and Activities

The objectives of the charity are to promote and safeguard the rights and wishes of marginalised and vulnerable individuals within our community. To support people to ensure that they are able to explore avenues open to them, to plan and discuss options and make informed decisions. Ultimately, we aim to empower the people of Sandwell to have more say and control over what happens in their lives, which we feel promotes a more inclusive society.

The aims adopted by the Charity to achieve these objects are as follows:

- a) To assist such people to obtain their full rights as a citizen.
- b) To provide long term personal support.
- c) To provide advocacy support on a one to one basis whether they reside in their own homes, in institutional care, or with relatives.

These aims and objectives will be achieved through provision of both paid and volunteer advocates. Both will receive relevant and appropriate training and support to ensure that they are able to perform their roles effectively.

We refer to those we support as 'advocacy partners' as we feel that our relationship is an equal partnership. The term 'client' or 'service user' are those used by providers of services and often have negative connotations for those who have accessed them.

An advocate will:

- Support the partner in expressing their views, concerns and opinions.
- Speak on behalf of the partner, raising any issues where required, but only as the partner wishes. It is desirable that people regain their own power to speak for themselves where possible. Advocates will support people when they speak for themselves.
- Develop a one to one relationship with a person for as long as the person wishes it to continue.
- Allow the partner to make his or her own decisions and choices whenever possible, even if the process of engagement is slow and uncertain. An advocate ensures that their partner retains maximum control.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

Achievements and Performance

No report covering the period April 2020 to March 2021 could begin without mention of the catastrophic global COVID-19 pandemic which has significantly impacted on our local, national and international environments. Inevitably the pandemic would present major implications for Sandwell Advocacy as we tried to adapt and develop the delivery of our services in line with the challenges we faced. As detailed in this report, the staff team adapted remarkably to these challenges and also stepped up to the mark with the development of some new initiatives. The resilience, dedication and imagination of the team throughout this period has been remarkable and they should be commended for their commitment and tireless contribution.

It is a credit to the team that Sandwell Advocacy have continued working throughout the pandemic, all be it in different ways. We had to build in contingencies to the way in which we operated to take account of government and public health guidelines, therefore our face to face meetings had to be put on hold temporarily. However all of our staff remained operational and were already able to adopt remote working practices with remote access to our operational systems. Where we were unable to conduct face to face visits we continued to provide support via telephone calls, emails, text and post to those we support and their families. We also adopted a range of digital communication options such as: Skype, Zoom, Microsoft Teams, Facebook Messenger and video chat etc.

We expanded some of our operational activities to meet the needs of those we supported during this time, for example we delivered art and craft resources from our own supplies to families most in need whilst children were in isolation. We also continued to provide foodbank vouchers, and where necessary collect foodbank parcels for delivery to those in most need. Perhaps most significantly we also established Sandwell Together, a telephone befriending service aimed at maintaining contact with those who were shielding and/or in isolation who were lonely and isolated.

As we approached the latter part of this reporting period COVID-19 restrictions started to be lifted after a number of paralysing national lockdowns. We set about planning for reset and recovery and made sure we were well prepared for a return to what was referred to as the 'new normal'. Whilst we were keen to get back to more traditional face to face operations we incorporated some of the more innovative ways of engaging with those we support. For example we were fortunate to have received funding to enable us to provide a number of data enabled tablets that continue to provide support virtually where appropriate. This initiative has had the added advantage of addressing the digital exclusion some of our users face when they would not otherwise have had an internet connection or access to the technology. Our return back to office-based working was carefully managed and risk assessed to maintain effective infection control measures and to keep staff and those we work with safe.

Our Advocacy Project for Young Carers continued throughout this period. We are grateful to Sandwell Children's Trust for funding this much needed project for children, young people and their families. Helen Charles, Juanita Williams and Sharon Wilson continued their work on this project providing both one to one person-centred advocacy support, a range of activities and co-ordinated the work of our User-Engagement Group. It was pleasing to note that our User-Engagement Group worked with Healthwatch Sandwell on a consultation about 'Caring During COVID-19 Carers Experiences in Sandwell'. We continue to receive positive feedback from stakeholders and beneficiaries regarding the support we provide for young carers. We also have many case studies that outline the difference this work makes to the lives of those we support.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

We were pleased to receive news at the beginning of this period that our Adult Advocacy Support Service contract with SMBC would continue for a further two years from April 2020. Because this project supports individuals in nursing/residential care, Extra Care Scheme's and Day Centre settings, our activities were significantly curtailed with the onset of the pandemic. This was a really difficult time for many residents and users of these settings as they were either locked down or shut down all together. Carol Turley continued to be employed on this project, however for a number of months she was re-deployed onto our Sandwell Together telephone befriending service where she took the lead on co-ordinating activities. Carol continued to develop alternative ways of operating under COVID conditions in preparation for the re-opening of these settings, again telephone and virtual contacts were put in place. We were particularly keen to resume our activities in whatever guise given the importance of residents in care homes having a voice, particularly given the climate where there had been limited or no visits from friends or family. Operations on this project recommenced in January 2021 using a range of remote working procedures.

Our Sandwell Advocacy Voice and Empowerment (SAVE) Project funded by BBC Children in Need continued into its second year during this period. The SAVE Project provides an advocacy, enabling and support service for children and young people who are experiencing poor mental health and/or behavioural issues that empowers them to ensure that their rights are respected and their views and wishes are heard at all times. Helen Charles and Juanita Williams provided independent advocacy support on SAVE. In March 2021 we were delighted to welcome Nazia Yousaf who joined the team as an independent advocate on SAVE, replacing Juanita Williams who was subsequently re-deployed onto our Sandwell Together project.

Linsey Robinson continued to work as Project Officer on our Voices and Choices Project funded by the Lloyds Bank Foundation. This project entered its second year and provides vital support for older people with their care and accommodation issues. Linsey also had to adapt to new ways of working under the pandemic but continued to provide support for older people with long-term health conditions to:

- Ensure that older people wishing to remain/maintain living independently in their own homes with appropriate support are able to do so.
- Ensure that older people and their families/carers/friends who are considering options around a move into care provider accommodation have access to relevant information and are supported to make informed decisions about their care options.
- Provide longer-term support delivered by a team of trained volunteers to address loneliness and isolation and ensure that vulnerable older people are safeguarded from harm and abuse.

As mentioned earlier one of the key areas we committed a lot of time and energy from the onset of the pandemic was with the introduction of our Sandwell Together befriending service. This service was created as a partnership with Sandwell Advocacy, Sandwell Council of Voluntary Organisations and Sandwell Metropolitan Borough Council in response to the national COVID19 lockdown in March 2020. Volunteers were recruited and trained to offer a telephone befriending service for people who had been shielding and/or self-isolating, many of whom had limited or no access to friends and family. Volunteers provide emotional support and address issues people face as a result of becoming socially isolated such as loneliness, anxiety, depression, fear etc. by allowing people to talk about their feelings thereby reducing the impact of isolation and loneliness. It soon became apparent whilst delivering this service that demand from people seeking support would not diminish with the easing of lockdown measures. Indeed loneliness and isolation would remain and residents more generally would benefit from having a listening ear and someone to talk to. We were really pleased therefore to secure funding from various sources to allow this service to continue and develop. We subsequently employed Juanita Williams as our Volunteer Development Officer in November 2020 to take over the reins from Carol Turley. Juanita has settled to the task well and is now responsible for all aspects of this project including:

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

- Recruiting volunteers
- Volunteer training
- Policies and procedures
- Dealing with referrals
- Matching volunteers to those referred
- On-going volunteer support and facilitating our volunteer Peer Support Group

Our close links as members of Communities in Sync (CIS) continued throughout this period. CIS is a consortium of local health, social care and well-being providers working together in partnership to improve the lives of people in the local community. Our work with consortia partners continued to deliver Caring for Carers, funded by Birmingham City Council, which supports carers through loss and bereavement. Other partner providers delivering this project are: Ideal for All, Crossroads Care, Sandwell African Caribbean Mental Health Foundation and West Bromwich African Caribbean Resource Centre. Helen Charles and Juanita Williams worked alongside consortium colleagues as Health and Wellbeing Officers. The service goes from strength to strength using whatever is available to help those in need. Other strands of the service offered are a Healing Garden for those green fingered people and Living Memory for people wishing to share their stories using photographs and their own words to describe their lives together.

We were hopeful that our close partnership with Murray Hall Community Trust would continue to deliver a joint project funded by SCVO's EPIC Grant Programme entitled '*Dying to Know – Compassionate Communities Project*'. Our vision is that this would facilitate community forums to enable conversations about death, dying and loss and deliver workshops to train people from other organisations to become Compassionate Community Champions. We also wanted to train volunteers to become Compassionate Community Champions to facilitate group conversations and attend events in their local areas. It was disappointing that our plans had to be put on hold as a result of the pandemic at a time when arguably it was most needed. Plans were starting to be put in place towards the end of this reporting period to continue with this initiative.

Like many organisations in the voluntary sector we certainly noticed an increase in demand for our services throughout the pandemic. In the new year of 2021 we realised that the current staff team were struggling to balance the increased demand on our operational activities with their administrative duties. In response to this the board made the decision to recruit a Business Support Officer to provide much needed support to the team. We were delighted to appoint Sharon Jenkins to the role, Sharon has settled in very quickly and brings immense skills and experience to the team.

The board of trustees, in conjunction with our CEO Dave Bradshaw, have undertaken a significant amount of work strategically on our governance arrangements and business planning. A small working group was formed to finalise our Business Plan for 2020 – 2023. The Business Plan clearly sets out our strategic priorities and implementation plan for the next three years. The priorities include continuation/expansion of our operational service offer and recruiting new trustees to the board. As part of our effort to recruit new management trustees a small working group was also established to develop a Trustee Welcome Pack. We wanted to ensure that there was a more structured and coherent approach when inducting new trustees. This hard work has paid off when we welcomed Gurdeep Hanspaul to the board in November 2020 and Carmen Tulloch joined us in January 2021. Towards the end of this period we were fortunate to receive further support from the Lloyds Bank Foundation *Enhance Programme* to bring in Reach Volunteering who have also commenced work to support us to add to our team of trustees.

Steve Leighton continued to manage our finances throughout this period, including payroll and budget monitoring. Steve continued to provide management accounts and cash flow projections at meetings of our trustees.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

Any report on the year cannot ignore the fantastic work of all of our volunteers. The pandemic has created many challenges for us all but it has been inspirational to see so many new volunteers come forward during this time to support people in a time of great need. Our volunteers get involved for many different reasons, but all do so because they want to make a meaningful difference to people's lives. We would not be able to function in the way that we do without the commitment of our volunteers who donate their valuable time, skills and experiences. Our board of trustees also give their time freely as volunteers to ensure that Sandwell Advocacy is steered in the right direction and once again it has been a pleasure to work alongside them as a team.

We gratefully acknowledge the financial contribution received from a variety of sources throughout 2020/2021, without which our valuable work could not be delivered or sustained. Funding, grants and donations were most gratefully received from the following:

- Sandwell Children's Trust
- Sandwell Metropolitan Borough Council
- BBC Children in Need
- Birmingham City Council
- Lloyds Bank Foundation
- SCVO Vision 2030 Community Grant
- Children In Need COVID-19 Booster Programme
- Lloyds Bank Foundation COVID React Fund
- SCVO Vision 2030 COVID-19 Response Fund
- National Lottery Community Fund
- Heart of England Community Foundation
- Gavin Bevan sponsored Yorkshire Three Peaks Challenge
- West Midlands Police Community Initiative Fund
- Alfred Haines Charitable Trust
- The Asda Foundation
- Tipton Civic Society
- The Tipton and Coseley Building Society Charitable Foundation
- Baron Davenport's Charity

These have indeed been very challenging times, however it is testament to our staff and volunteers that we have continued to operate throughout this crisis. Their resourcefulness and innovative practices have enabled us to provide much needed support through very difficult times. We look forward to better times ahead when it is hoped that we can deliver our services using a combination of traditional face to face approaches and those we have developed under COVID restrictions.

SANDWELL CITIZEN ADVOCACY

TRUSTEES' REPORT (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

The trustees' report was approved by the Board of Trustees.

A handwritten signature in black ink, appearing to read 'L. Donnelly', written in a cursive style.

Lesley Donnelly (Chair)

Trustee

Dated: 6 October 2021

SANDWELL CITIZEN ADVOCACY

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF SANDWELL CITIZEN ADVOCACY

I report on the accounts of the charity for the year ended 31 March 2021, which are set out on pages 9 to 16.

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 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- (i) examine the accounts under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- (iii) 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 next statement.

Independent examiner's statement

Your attention is drawn to the fact that the charity has prepared accounts in accordance with 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) in preference to the Accounting and Reporting by Charities: Statement of Recommended Practice issued on 1 April 2005 which is referred to in the extant regulations but has now been withdrawn.

I understand that this has been done in order for the accounts to provide a true and fair view in accordance with Generally Accepted Accounting Practice effective for reporting periods beginning on or after 1 January 2015.

In connection with my examination, no other matter except that referred to in the previous paragraph has come to my attention:

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
 - (i) to keep accounting records in accordance with section 130 of the 2011 Act; and
 - (ii) to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Nigel Kirkham FCCA

Chartered Certified Accountant
Shakespeare Buildings
26 Cradley Road
Cradley Heath
West Midlands
B64 6AG

Dated: 6 October 2021

SANDWELL CITIZEN ADVOCACY

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH 2021

	Notes	Unrestricted funds £	Restricted funds £	Total 2021 £	Total 2020 £
<u>Income and endowments from:</u>					
Donations and legacies	2	13,866	221,317	235,183	271,318
Other income	3	4,000	-	4,000	5,991
Total income		17,866	221,317	239,183	277,309
<u>Expenditure on:</u>					
Charitable activities	4	223	212,577	212,800	271,888
Net incoming resources before transfers		17,643	8,740	26,383	5,421
Gross transfers between funds		6,371	(6,371)	-	-
Net Income for the year/ Net movement in funds		24,014	2,369	26,383	5,421
Fund balances at 1 April 2020		89,278	543	89,821	84,400
Fund balances at 31 March 2021		113,292	2,912	116,204	89,821

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

SANDWELL CITIZEN ADVOCACY

BALANCE SHEET

AS AT 31 MARCH 2021

	Notes	2021 £	£	2020 £	£
Current assets					
Debtors	7	10,024		-	
Cash at bank and in hand		174,376		154,875	
		<u>184,400</u>		<u>154,875</u>	
Creditors: amounts falling due within one year	8	(68,196)		(65,054)	
Net current assets			<u>116,204</u>		<u>89,821</u>
Income funds					
Restricted funds	10		2,912		542
Unrestricted funds			<u>113,292</u>		<u>89,279</u>
			<u>116,204</u>		<u>89,821</u>

The accounts were approved by the Trustees on 6 October 2021



Lesley Donnelly
Chair

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2021

1 Accounting policies

1.1 Accounting convention

The accounts have been prepared in accordance with the charity's governing document, the Charities Act 2011 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The accounts have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a true and fair view. This departure has involved following the Statement of Recommended Practice for charities applying FRS 102 rather than the version of the Statement of Recommended Practice which is referred to in the Regulations but which has since been withdrawn.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The accounts have been prepared under the historical cost convention, modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value. The principal accounting policies adopted are set out below.

1.2 Going concern

At the time of approving the accounts, the Trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the accounts.

1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the accounts.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

1.4 Incoming resources

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

1 Accounting policies

(Continued)

1.5 Resources expended

Resources expended on charitable activities include all costs incurred in the pursuit of the charitable objects of the charity. Expenditure is recognised when a liability is incurred.

Governance costs include the cost of the independent examination together with the cost of the AGM and the trustees insurance.

1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Fixtures, fittings & equipment	25% Straight Line
--------------------------------	-------------------

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in net income/(expenditure) for the year.

1.7 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

1.8 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

1.9 Retirement benefits

The pension costs charged in the accounts represent the contributions payable by the charity during the year in accordance with FRS 17: Retirement Benefits.

1.10 Taxation

The charity has been registered for VAT since 1st December 2011. Income and expenditure is shown net of VAT where applicable. Expenditure is shown inclusive of VAT where it is irrecoverable.

The organisation, being a registered charity with minimal trading income, is exempt from tax under Section 505 of Income and Corporation Taxes Act 1988. No provision for taxation is made in these accounts.

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

2 Donations and legacies

	Unrestricted funds	Restricted funds	Total 2021	Total 2020
	£	£	£	£
Donations and gifts	5,816	-	5,816	5,158
Grants receivable for core activities	8,050	221,317	229,367	266,160
	<u>13,866</u>	<u>221,317</u>	<u>235,183</u>	<u>271,318</u>
For the year ended 31 March 2020	<u>5,158</u>	<u>266,160</u>		<u>271,318</u>

3 Other income

	2021	2020
	£	£
Other income	<u>4,000</u>	<u>5,991</u>

4 Charitable activities

	2021 £	2020 £
Staff costs	148,570	135,223
Provision of advocacy, support and information	62,780	135,252
	<u>211,350</u>	<u>270,475</u>
Share of governance costs	1,450	1,413
	<u>212,800</u>	<u>271,888</u>

5 Trustees

The charity has not at any time entered into any material transactions, contracts or other arrangements with its trustees, employees or any other persons, business, or charities connected with them.

Trustee indemnity insurance has been taken out by the charity at an annual premium of £550 (2020- £513).

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

6 Employees

Number of employees

The average monthly number employees during the year was 6

2021 Number	2020 Number
6	6

Employment costs

Wages and salaries

Other pension costs

2021 £	2020 £
142,045	129,344
6,525	5,879
148,570	135,223

7 Debtors

Amounts falling due within one year:

Trade debtors

2021 £	2020 £
10,024	-

8 Creditors: amounts falling due within one year

Other taxation and social security

Deferred income

Trade creditors

Other creditors

Accruals and deferred income

Notes	2021 £	2020 £
	4,066	4,232
9	61,448	56,050
	334	2,528
	728	654
	1,620	1,590
	68,196	65,054

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

9 Deferred income

	2021 £	2020 £
Other deferred income	61,448	56,050

Deferred income is included in the financial statements as follows:

	2021 £	2020 £
Creative Communities	2,068	868
Lloyds Bank Foundation	21,253	21,023
People's Postcode Lottery	-	1,365
Within Living Memory	98	1,343
Greggs Foundation	-	346
Awards for All	-	2,571
Community Partnerships (SCVO)	-	519
Asda Foundation	-	750
Arts Council	-	14,059
Cadbury Foundation	-	2,500
Caring for Carers	-	1,041
Time for Me	9,415	9,665
SAVE	1,376	-
React Fund	1,274	-
Community Initiatives	4,197	-
Doing Things Differently	1,415	-
Vision 2030	4,738	-
COVID-19 Booster Programme	614	-
Our Commonwealth	15,000	-
	61,448	56,050

SANDWELL CITIZEN ADVOCACY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2021

10 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Balance at 1 April 2020	Movement in funds			Balance at 31 March 2021
	£	Incoming Resources £	Expenditure £	Transfers £	£
Young Carers	-	88,281	(85,369)	-	2,912
Adults Advocacy Support Service	543	12,658	(13,201)	-	-
Voices and Choices	-	23,381	(23,381)	-	-
SAVE (Children in Need)	-	27,947	(25,424)	(2,523)	-
Within Living Memory	-	7,471	(7,671)	200	-
Arts Council	-	20,009	(19,286)	(723)	-
Caring for Carers	-	20,266	(18,766)	(1,500)	-
Time for Me	-	250	(250)	-	-
React Fund	-	1,426	(1,426)	-	-
Community Initiative Fund	-	802	(802)	-	-
COVID-19 Response	-	9,528	(9,078)	(450)	-
Doing things differently	-	7,585	(6,210)	(1,375)	-
Vision 2030	-	762	(762)	-	-
COVID-19 Booster	-	951	(951)	-	-
	543	221,317	(212,577)	(6,371)	2,912

11 Analysis of net assets between funds

	Unrestricted £	Restricted £	Total £
Fund balances at 31 March 2021 are represented by:			
Current assets/(liabilities)	113,292	2,912	116,204
	113,292	2,912	116,204