WALES MOBILITY DRIVING ASSESSMENT SERVICE

England & Wales · Charity number 1056588

Details

Other names	WALES DISABLED DRIVERS ASSESSMENT CENTRE
Status	Registered
Legal form	Other
Registered	1996-07-04
Register	View on the Charity Commission register

Contact

Address	Rookwood Hospital 18-20 Fairwater Road Cardiff CF5 2YN
Phone	02920555130
Email	sandra@wddac.co.uk
Website	www.wmdas.co.uk

Activities

Objects: A)TO RELIEVE AND ASSIST PEOPLE WITH PHYSICAL AND COGNITIVE IMPAIRMENTS, AS WELL AS THOSE PEOPLE WITH IMPAIRED MOBILITY, OR THOSE WHO MAY BE VULNERABLE TO SUCH CONDITIONS. BY REASON OF AGE OR INFIRMITY IN ANY WAY WHICH SHALL FOR THE TIME BEING BE CHARITABLE IN LAW: ANDB) TO PROMOTE THE IMPROVEMENTS OF STANDARDS OF DRIVING AND THE ADVANCEMENT OF ROAD SAFETY AND TRAVEL.

Activities: To provide a high quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living in all Wales by enabling them to resume or remain independently mobile

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives, Disability
- **Who:** Elderly/old People, People With Disabilities, The General Public/mankind

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Geography

- Throughout Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£664,283	£615,984	£264,573	12
2024-03-31	£665,962	£615,984	£250,763	12
2023-03-31	£594,571	£593,611	£200,785	13
2022-03-31	£487,000	£556,000	-	-
2021-03-31	£463,710	£471,848	-	-

Trustees

Name	Role	Appointed
Dean Alcock		2025-11-24
Jodie Gallagher-Smith Ms		2026-03-04
John Carter		2019-01-28
LINDA HARRINGTON		2019-01-28
Mary Stevenson		2019-01-28
PAUL BREWER		2019-01-28
Tamlyn Palmer		2025-11-24

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WALES MOBILITY DRIVING ASSESSMENT SERVICE

England & Wales - Charity number 1056588

Accounts

Charity registration number: 1056588

Wales Mobility Driving Assessment Service

Annual Report and Financial Statements

for the Year Ended 31 March 2025

Wales Mobility Driving Assessment Service

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Wales Mobility Driving Assessment Service

Trustees' Report

The trustees present the annual report together with the financial statements of the charity for the year ended 31 March 2025.

Structure, Governance and Management

The Wales Mobility & Driving Assessment Service (WMDAS) is located in South Wales at Rookwood, Llandaff, Cardiff and in North Wales at Ty Enfys, Ysbyty Glan Clywd, Bodelwyddan, Denbighshire. Satellite services are operated in Mid Wales based at Montgomery Hospital, Newtown, Government Buildings Carmarthen,and West Wales in South Pembrokeshire Community Hospital. Many people from the borders of England and Wales have traditionally been referred to the North Wales service because of geographical proximity. The North Wales Manager, Gary Jones, supported by Driving Mobility and financed by the Department for Transport (DfT) in England, developed and established a centre in Chester, Chester Driveability (CDA) to undertake assessments for the ever-increasing number of referrals from this area, an outreach centre at the Wirral has also been developed to meet the demand for the service. In Chester and the Wirral, the DfT pays an amount to meet the near actual cost for each assessment in keeping with their policy for all other English centres. DfT also fully funded the setting up costs and other WMDAS resource costs needed to establish the Chester and Wirral services. In 2025 following a meeting with the CEO of Driving Mobility (DM) it was agreed that the Chester service would no longer be operated by the staff from the Welsh service and the Chester service ceased on March 31st 2025.

The WMDAS is a registered Charity No. 1056588 set up under a trust deed. The service is part funded by a Welsh Government Grant under section 64 of the Health Services and Public Health Act 1968. However, as from April 2016, the format of the grant was changed from ongoing ‘core’ funding to 3 year ‘project’ funding that requires a fresh re-submission every three years as well as detailed interim reports on a half yearly basis. This funding is allocated on a yearly basis subject to the terms and conditions set by the Welsh Government (WG), one of which is attaining the targets that have been set year on year. Re-application for the grant is in competition with other charities in Wales. This format of funding makes the future of the charity less secure and will require alternative streams of funding, at best to supplement, and at worst to replace, this source of funding. The grant is for *all* Wales and the Director who is based at the South Wales Centre manages the budget for both Centres.

The South Wales Centre operates under a Service Level Agreement with the University Health Board where accommodation and utilities are provided free of charge in exchange for the services of centre staff in helping with the assessment and rehabilitation of inpatients and providing teaching to staff. The entire in-patient hospital relocated to Llandough Hospital during 2021/22 and new premises for the WMDAS have been refurbished on the NHS retained part of the Rookwood site though in a different building. The North Wales centre, located in the Ty Enfys building, pays an annual rent which includes their utilities. Both centres pay their own Telecom and other costs. Both the DVLA and Motability pay the cost for any referrals they make to either centre. In all other cases, clients are self-referring and pay a set fee towards the cost of the assessment.

The service offers both driver and passenger assessments to provide the client with a long-term mobility solution. The driving assessment is not a driving test. The aim of the assessment is to evaluate the current physical and cognitive ability of the individual to drive a motor vehicle in safety and comfort at the time of the assessment. Clients are interviewed to assess their physical abilities and background information is gathered on daily living needs. This is followed by a cognitive assessment by one of the clinical assessment team followed by an assessment in a vehicle with adaptations where necessary in off-road and on-road situations. A report and relevant leaflets and information are sent to the client within 10 days of the assessment.

Passenger assessments are undertaken for clients who experience difficulties with access to and from a vehicle. The centres have a wide range of equipment that may reduce or eliminate the physical effort involved during transfers.

The centres also provide a free information and advice service and can advise on a range of issues including DVLA, legislation, Motability schemes, driver tuition, vehicle adaptation firms, insurance companies, and much more. A WMDAS website provides access to booking and paying for assessments online.

Objectives

To provide a high-quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living throughout Wales by enabling them to resume or remain independently mobile.

Trustees and organisational structure

The Wales Mobility & Driving Assessment Service has an Executive Committee of 7 members who meet quarterly or sooner if needed and are responsible for the strategic direction and policy of the charity. The Committee is comprised of members from a variety of backgrounds relevant to the work of the charity.

Communication between Centres. The geographical challenges of North and South Wales make road connections long and difficult and this had resulted in a degree of isolation of the centres. However in past years, we have managed to strengthen the links by several means. Due to lockdown, virtual meetings via Zoom and Teams have become the usual way to keep in touch and to hold Trustee, Staff and Management meetings. This method has proved very beneficial and now a regular occurrence. Trustees, who are mostly based in South Wales, have also been able to visit North Wales and we now have two Trustees from North Wales, who have attended meetings via Zoom. Furthermore, the Minutes of the Trustees' meetings are circulated to the North Wales Advisory committee and North and South Wales staff. Centre Managers are present at Trustee meetings together with a different staff member from either south or north Wales centres.

Funding the Service. For over 30 continuous years until the end of 2018/2019, the WMDAS main source of funding for its activities in Wales was via a (recurrent) 3-year Welsh Government grant scheme. When the focus of this 3-year grant scheme was then changed from core funding to project funding, the WMDAS was unsuccessful in its funding bid. However, the Welsh Government did decide to maintain a grant.

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a three-year funding award to WMDAS with an increased funding allocation of £360k for each of the years 2022/23, 2023/2024, 2024/25. This much welcomed and needed 3-year grant award together with the uplift in grant funding now provide WMDAS with greater stability as we move forward in developing and delivering our service provision in Wales. However, the rollover grant funding for 2025-26 with no increase is a real terms decrease in our funding.

The Welsh Government's grant is administered through the South Wales Centre and the Director has the overall responsibility for managing the utilisation of these grant resources throughout the WMDAS and liaising with the Welsh Government on all grant matters. In undertaking this task, the Director also ensures (on an ongoing basis) that the Trustees are kept fully and properly informed of the WMDAS' financial position.

Links with Driving Mobility. Both centres are affiliated to and accredited by Driving Mobility (DM) and work in compliance with DM Governing Documents, as well as the grant requirements stipulated by the Welsh Government and the Charity Commission. The interlinks between the two centres and Driving Mobility (DM) have also become stronger. DM is the umbrella organisation for DfT to manage policy making for the UK centres and has also been proactive in making assessment results across the centres transparent and are continually working with centres towards better standardisation and comparable outcomes.

Increased complexity of rules and regulations: There has been increased demands for complex databases and explicit written policies and procedures for evolving aspects of the law from various departments of WG, the bank and the Charity Commission as well as the existing ones for audit from DM and Dft. These cover Privacy Policies and cyber security and continues to put further time demands on the managers and the Director.

Wales Mobility Driving Assessment Service

Trustees' Report

Risk Management

The Board of Trustees has conducted a review of the major risks to which the charity is exposed and where appropriate, systems and procedures have been established to mitigate the risks the charity faces.

(1). Age of Trustees: Many of the Trustees were long serving and there was a lack of new potential Trustees seeking election over a number of years. We are now fortunate to have elected new Trustees who have different backgrounds and skills to inform our consideration.

(2). Age of South Wales staff: The mean age of the staff in the Driving Assessment Centre in South Wales was at or above retirement age and has been ameliorated. Two staff members retired and following the employment of new staff across the service the staffing is now more representative of the working age population.

Achievements and Performance

1. *Main Service Provision and Activity.*
2. *Awareness Training and Teaching:*

Coronavirus resulted in the centres' closure which is reflected in the table below:

STATISTICS:

The overall numbers of clients assessed between 1 April 2024 and March 31 2025

No of Assessments	South/West Wales	North/Mid Wales	Chester	Total
2017/18	565	310	108	983
2018/19	583	232	152	967
2019/20	615	290	159	1064
2020/21	237	91	44	371
2022/23	538	272	201	1011
2023/24	557	302	262	1121
2024/25	641	315	329	1285
Total	**3736**	**1812**	**1255**	**6803**

Of the 1285 assessments in 2024/25(including Chester/Wirral): **68** were review driving assessments who are assessed to ascertain their ability to remain driving in safety and so preserve their independence for as long as possible.

Referral sources in 2024/25: Self / family:819 DVLA:390 Motability MoMap: 145 NHS/Health Professionals: 111 Social Services:15: Fit to Drive 88

a) Customer Satisfaction Survey

This year's Survey again shows WMDAS is fulfilling the expectations and needs of clients (with 98% of respondents marking satisfied and very satisfied with the service)

To ensure a representative view of service users, irrespective of the outcome of their assessment, a Customer Satisfaction Survey was sent to all clients who had attended between April 2024 to March 2025. However, in cases that had potential to cause distress to the client or client families, a decision was made to withdraw these

individuals from circulation of this survey. This refers to clients who have attended for assessment and who have no insight into their deficits caused by cognitive decline. It also refers to clients who have attended but have passed away. Clients who returned for review are not routinely sent a CSS as some attend at 6 monthly intervals. NW includes outcomes for Mid and North Wales, South Wales includes West Wales outcome.

The full set of data gathered during 2024/25 can be viewed on request. A summary of the data is contained in the Director of Services report. Clients are encouraged to review the service they have received on Google. WMDAS has received 5* ratings and clients comments can be viewed by typing in www.wmdas.co.uk and Google reviews on the right hand side on the screen.

(b) Chester Driveability

Following the successful establishment and development of Chester Driveability by WMDAS over the last few years, Driving Mobility concluded that it would be appropriate for them to absorb the full responsibility for the delivery and further development of Chester Driveability within their own organisation. This was implemented with effect from 1 April 2025 and WMDAS now has no role in the administration or management of Chester Driveability. 3 WMDAS assessment staff transferred to Driving Mobility from 1 April 2025 under the Transfer of Undertakings (Protection of Employment) Regulations arrangements and subsequently (following a Driving Mobility recruitment process), Gary Jones was successful in being appointed by Driving Mobility as the Chester Drivability Centre Manager.

(c) *Adapted – Vehicle Driver Training Service*

The driver training service has been expanded to service clients with mobility problems. **40** clients received this service with over 200 hours of driver training in a range of adapted vehicles during 2024/25. This service has proved extremely popular and has provided a lifeline to those with disabilities as prior to WMDAS developing this service, there were almost no driving schools with the expertise or adapted cars to accommodate those who are unable or unsafe to drive in the conventional manner. This useful service is also a revenue raising activity for WMDAS.

(d) Older Driver Fitness to Drive pilot scheme.

This is a joint WMDAS / Police initiative that aims to assess fitness to drive in older drivers who have been reported for committing a road traffic offence. The Older Driver Fitness to Drive scheme was suspended because of Coronavirus during 2020/21 and remained suspended for some months into 2022 . Referrals resumed in 2022 from Dyfed Powys Police but have not reached the referral rate received prior to the Pandemic closure due to operational changes within the force. Following a recommendation from the Coroner at Swansea Crown Court, South Wales Police expressed a wish to use our service followed by enquiries from Gwent Police. Negotiations have been completed and WMDAS began accepting referrals from South Wales Police from January 2023. After extensive negotiations North Wales Police have joined the scheme and are now referring to the North Wales centre. **88** Police Fit to Drive assessments were completed in 2024-25 over double the amount received and processed in 2023/24.

There were 19 training sessions for staff held during this financial year. This included First Aid/ Manual handling, / Disability Awareness/ Vehicle Adaptations/ Expert Witness/High Tech Training/HR/ Seating & Posture and Wheelchair Accessible training.

(a) *Open Days* – The Cardiff centre held an Open Day in July 2024 at the Maindy cycle track in Cardiff where adapted vehicles were available for those who thought they may never be able to drive. Visitors were given the opportunity to try vehicles and speak to assessment staff. The event was held in conjunction with SHINE the Hydrocephalus charity and was very well attended, therefore another event is planned for 2025 following the success of the 2024 day.

(b) *Clinical staff training*.

(c) *Awareness training for other individuals and organisations.* These take the form of presentations and demonstrations and have been given to memory clinic staff, neuromuscular clinics, Driving Instructors, Dementia Awareness Group, World Stroke Day, National Brain Injury Conference(in the Liberty Stadium).

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Both the North and South Wales centre hosted awareness and presentation sessions for clinical staff and medical advisors including the DVLA, Brain Injury teams, Occupational Therapists, Headway, Community Support workers, Psychologists.

Continuing Professional Development

One member of staff (North & South Wales) completed their final study module of the Driving Mobility Academic Programme Oxford Brookes University of Post Graduate *Certificate of Higher Education – Driving Assessment and Outdoor Mobility, and* graduated from Oxford Brookes University in May 2024. Two further staff members enrolled on the course in September 2024. Staff have also completed the following Continuing Professional Development.

- Bugzi Assessor Training
- Oxford Brookes Affiliate Lecture Training
- DM Education Programme – Assistive Technology
- Introduction of vehicle Adaptations
- Dementia Buis training
- AutoAdapt/Elap Vehicle Product Demonstration
- Supervision, Support & Appraisals
- HR training
- High Tech Training

Vehicle and Office Equipment Renewal.

Prior to the South Wales reaccreditation, office and assessment equipment and vehicles were updated and maintained in accordance with criteria set by Driving Mobility to maintain accreditation status. North Wales regained accreditation in 2022.

The South Wales Centre attained accreditation in December 2023. There is an ongoing vehicle replacement policy with vehicles sourced at half trade prices (to mobility centres only) from Motability.

Telecoms and office equipment were renewed/purchased in both centres as required with a networking system between North and South Wales completed. All staff have wmdas.co.uk email addresses.

Wales Mobility Driving Assessment Service

Trustees' Report

Financial Review

The principal funding source of the Charity in 2024-25 remained the Welsh Government under their 'stand-alone' grant funding arrangements. Salaries and earnings-related costs including the Government Pension Scheme introduced in January 2017 continue to represent the largest element of expenditure, details of which can be found in the Statement of Financial Activities. 2024-25 was the final year of our current financial grant support from the Welsh Government.

At the end of 2024, the Welsh Government informed WMDAS that during 2025 they would be undertaking a review of the current grant scheme arrangements but were not at that time able to provide WMDAS with any clarification about the review's terms of reference, its timescale or how it would be undertaken. As a consequence of this review, the Welsh Government advised WMDAS that our 2025-26 grant would be maintained at the 2024-25 levels. Maintaining our Welsh Government grant at £360,000 into a fourth year does represent a substantial year on year real terms decrease in our funding.

The Welsh Government's review of their current grant funding arrangements does introduce uncertainty in terms of whether WMDAS will continue to be grant funded from 2026-27 and beyond and if so what level of grant funding we will receive. WMDAS will strive to present a compelling case to the Welsh Government which will fully justify our grant funding being continued from 2026-27.

All WMDAS staff are to be congratulated for maintaining the number of assessments being undertaken to over 1,000 for each of the last 3 years including 2024-25. The level of the Charity's assessment fee has been kept under critical review and the Executive Committee took the hard but necessary decision to increase our 2025-26 fee level to £175 including for review driving assessments. This decision was reached to mitigate the real terms decrease in our grant funding and the significant inflationary and other cost pressures we have faced over recent years. Even at this increased fee level, clients will still only meet a proportion of the real cost of an assessment which is estimated to be well over £600. There will continue to be ongoing pressures on both expenditure and income during 2024-25 as WMDAS seeks to rebalance our North Wales centre in response to the consequences arising from Driving Mobility taking over full responsibility for the delivery of assessment services at Chester from April 2025 and to seek to meet the continuing demand for our services in Wales.

As an organisation we have strived to employ the necessary staff resources to meet our assessment demand. As necessary, we have utilised our reserves to fill any funding gaps for employing staff. At 31 March 2005, a slight increase to our cash in bank and in hand was achieved compared to the 31 March 2004 position, but securing greater organisational financial resilience remains one of our key aims. The Director and Trustees will continue to monitor our income and expenditure across the range of our organisation's activities. Proposals for any new activity will need to be considered against our other service delivery priorities and also demonstrate that they are cost effective and affordable.

All the 2024-25 Welsh Government funding was used as agreed and budgeted as detailed in the Business Plan with some adjustments to meet unplanned events.

Reserves policy

It is the policy of the charity to work towards accumulating unrestricted funds not committed or invested in tangible fixed assets representing between three and six months of expenditure.. Further information on our reserves position is outlined in the Financial Review section above.

Trustees' Report

Plans for future periods

As part of the accreditation process WMDAS was asked to produce a Strategic 3 Year Business Plan. A copy of this Plan is available on request.

Included in this Plan were proposals to open new outreach centres in Llanelli and in North-West Wales which were dependent on WMDAS being successful in receiving external grant funding from Motability. Unfortunately our bids for this grant funding were unsuccessful and our plans for these new outreach centres have had to be put in abeyance

Driver Training for those who have been assessed and need practise of driving in a new way using adaptations has been developed and proved extremely popular. There are few driving schools who have vehicles with adaptations therefore the centres use their vehicles and their experienced driving instructors to provide this essential service.

This provides a small additional revenue for WMDAS.

Trustees and officers

The trustees and officers serving during the year and since the year end were as follows:

Trustees:	Dr M Stevenson
	Mr J Carter
	Ms L Harrington
	Mr P Brewer
	Ms J McKinlay
	Mr D Hughes
	Ms S Miller (appointed 18 November 2024)
	Ms T Palmer (appointed 18 November 2024)

Wales Mobility Driving Assessment Service

Trustees' Report

Reference and Administrative Details

Charity Registration Number:	1056588
Principal Office:	Rookwood Hospital Fairwater Road Llandaff Cardiff CF5 2YN
Independent Examiner:	HSJ Accountants Limited Severn House Hazell Drive Newport NP10 8FY
Bankers:	Lloyds Bank 514 Cowbridge Road East Victoria Park Cardiff CF5 1BL

Wales Mobility Driving Assessment Service

Trustees' Report

Statement of Trustees' Responsibilities

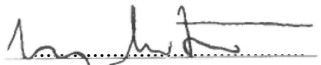
The trustees are responsible for preparing the trustees' report and the financial statements in accordance with the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

The law applicable to charities requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

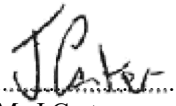
- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed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

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The annual report was approved by the trustees of the charity on 3 June 2025 and signed on its behalf by:



Dr M Stevenson
Chairman and trustee



Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Independent Examiner's Report to the trustees of Wales Mobility Driving Assessment Service

I report to the trustees on my examination of the accounts of Wales Mobility Driving Assessment Service for the year ended 31 March 2025.

Responsibilities and basis of report

As the charity trustees of Wales Mobility Driving Assessment Service you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Wales Mobility Driving Assessment Service's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

Since Wales Mobility Driving Assessment Service's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of FCCA ACA DChA BFP, which is one of the listed bodies.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of Wales Mobility Driving Assessment Service as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

.....
Mr Andrew Hill
FCCA ACA DChA BFP

Severn House
Hazell Drive
Newport
NP10 8FY

3 June 2025

Wales Mobility Driving Assessment Service

Statement of Financial Activities for the Year Ended 31 March 2025

	Note	Unrestricted funds £	Restricted funds £	Total 2025 £
Income and Endowments from:				
Donations and legacies		132	-	132
Charitable activities		146,518	516,361	662,879
Investment income	4	1,272	-	1,272
Total income		147,922	516,361	664,283
Expenditure on:				
Charitable activities		(161,670)	(488,803)	(650,473)
Total expenditure		(161,670)	(488,803)	(650,473)
Net (expenditure)/income		(13,748)	27,558	13,810
Net movement in funds		(13,748)	27,558	13,810
Reconciliation of funds				
Total funds brought forward		235,265	15,498	250,763
Total funds carried forward	14	221,517	43,056	264,573

	Note	Unrestricted funds £	Restricted funds £	Total 2024 £
Income and Endowments from:				
Donations and legacies		9,706	-	9,706
Charitable activities		149,158	506,054	655,212
Investment income	4	1,044	-	1,044
Total income		159,908	506,054	665,962
Expenditure on:				
Charitable activities		(125,428)	(490,556)	(615,984)
Total expenditure		(125,428)	(490,556)	(615,984)
Net income		34,480	15,498	49,978
Net movement in funds		34,480	15,498	49,978
Reconciliation of funds				
Total funds brought forward		200,785	-	200,785
Total funds carried forward	14	235,265	15,498	250,763

All of the charity's activities derive from continuing operations during the above two periods.

The funds breakdown for 2024 is shown in note 14.

Wales Mobility Driving Assessment Service

(Registration number: 1056588)
Balance Sheet as at 31 March 2025

	Note	2025 £	2024 £
Fixed assets			
Tangible assets	11	117,516	107,456
Current assets			
Debtors	12	17,756	19,445
Cash at bank and in hand		164,706	126,526
		182,462	145,971
Creditors: Amounts falling due within one year	13	(35,405)	(2,664)
Net current assets		147,057	143,307
Net assets		264,573	250,763
Funds of the charity:			
Restricted income funds			
Restricted funds		43,056	15,498
Unrestricted income funds			
Unrestricted funds		221,517	235,265
Total funds	14	264,573	250,763

The financial statements on pages 11 to 20 were approved by the trustees, and authorised for issue on 3 June 2025 and signed on their behalf by:

.....
Dr M Stevenson
Chairman and trustee

.....
Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Notes to the Financial Statements for the Year Ended 31 March 2025

1 Accounting policies

Exemption from preparing a cash flow statement
The charity opted to early adopt Bulletin 1 published on 2 February 2016 and have therefore not included a cash flow statement in these financial statements.

Income and endowments

Donations and legacies

Donations are recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Gifts in kind

Donated goods and services are recognised in both income and expenditure at fair value at the date on which the benefit is received.

Investment income

Investment income is recogised on a receivable basis.

Charitable activities

Income from charitable activities includes income recognised as earned (as the related goods or senrices are provided) under contract or where entifiement to grant funding is subject to specific performance conditions. Grant income included in this category provides funding to support programme activities and is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Expenditure
All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category. Where costs cannot be directly attributed to particular headings they have been allocated on a basis consistent with the use of resources, with central staff costs allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use. Other support costs are allocated based on the spread of staff costs.

Charitable activities

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

Support costs
Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources, for example, allocating property costs by floor areas, or per capita, staff costs by the time spent and other costs by their usage.

Governance costs
These include the costs attributable to the charity's compliance with constitutional and statutory requirements, including audit, strategic management and trustees's meetings and reimbursed expenses.

Taxation
The charity is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the charity is potentially exempt from taxation in respect of income or capital gains received within categories covered by Chapter 3 Part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

Tangible fixed assets
Individual fixed assets costing £1,000.00 or more are initially recorded at cost.

Depreciation and amortisation
Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Asset class	Depreciation method and rate
Fixtures & fittings	20% on reducing balance
Motor vehicles	25% on reducing balance
Computer equipment	25% on reducing balance

Cash and cash equivalents
Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

Fund structure
Unrestricted income funds are general funds that are available for use at the trustees's discretion in furtherance of the objectives of the charity.

Restricted income funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Pensions and other post retirement obligations
The charity operates a defined contribution pension scheme which is a pension plan under which fixed contributions are paid into a pension fund and the charity has no legal or constructive obligation to pay further contributions even if the fund does not hold sufficient assets to pay all employees the benefits relating to employee service in the current and prior periods.

Contributions to defined contribution plans are recognised in the Statement of Financial Activities when they are due. If contribution payments exceed the contribution due for service, the excess is recognised as a prepayment.

2 Income from donations and legacies

	Unrestricted General £	Total 2025 £	Total 2024 £
Donations and legacies;			
Donated assets and services	-	-	9,106
Donations from individuals	132	132	600
	132	132	9,706

3 Income from charitable activities

	Unrestricted funds General £	Restricted funds £	Total 2025 £	Total 2024 £
Assessment and advice services	146,518	516,361	662,879	655,212

	Unrestricted funds General £	Restricted funds £	Total 2025 £	Total 2024 £
Assessment fees - Wales	134,175	-	134,175	116,735
Assessment fees - Chester	-	144,594	144,594	136,072
Welsh Government	-	360,000	360,000	360,000
Lessons	12,343	-	12,343	32,423
Development Funds - Chester	-	11,767	11,767	9,982
	146,518	516,361	662,879	655,212

4 Investment income

	Unrestricted funds General £	Total 2025 £	Total 2024 £
Interest receivable and similar income;			
Interest receivable on bank deposits	1,272	1,272	1,044

5 Expenditure on charitable activities

	Note	Unrestricted funds General £	Restricted funds £	Total 2025 £	Total 2024 £
Assessment and advice services		87,457	46,822	134,279	155,003
Staff costs		67,127	441,549	508,676	455,137
Governance costs		7,086	432	7,518	5,844
		161,670	488,803	650,473	615,984

6 Analysis of governance and support costs

Support costs allocated to charitable activities

	Basis of allocation	Information technology £	Staff costs £	Administration costs £	Total 2025 £
Assessment and advice services	A	8,000	109,047	16,500	133,547

	Basis of allocation	Information technology £	Staff costs £	Administration costs £	Total 2024 £
Assessment and advice services	A	5,000	136,500	34,000	175,500

Basis of allocation

Reference	Method of allocation
A	Caluclated at a rate of 25% support time incurred

7 Trustees remuneration and expenses

No trustees, nor any persons connected with them, have received any remuneration from the charity during the year.

No trustees have received any reimbursed expenses or any other benefits from the charity during the year.

8 Staff costs

The aggregate payroll costs were as follows:

	2025 £	2024 £
Staff costs during the year were:		
Wages and salaries	462,137	414,024
Social security costs	38,405	33,937
Pension costs	8,134	7,176
	508,676	455,137

The monthly average number of persons (including senior management / leadership team) employed by the charity during the year expressed as full time equivalents was as follows:

	2025 No	2024 No
Assessment services	12	12

No employee received emoluments of more than £60,000 during the year

9 Independent examiner's remuneration

	2025 £	2024 £
Examination of the financial statements	3,194	2,514

10 Taxation

The charity is a registered charity and is therefore exempt from taxation.

11 Tangible fixed assets

	Furniture and equipment £	Motor vehicles £	Total £
Cost			
At 1 April 2024	20,949	194,461	215,410
Additions	6,366	52,956	59,322
Disposals	-	(37,388)	(37,388)
At 31 March 2025	27,315	210,029	237,344
Depreciation			
At 1 April 2024	8,106	99,848	107,954
Charge for the year	3,302	23,839	27,141
Eliminated on disposals	-	(15,267)	(15,267)
At 31 March 2025	11,408	108,420	119,828
Net book value			
At 31 March 2025	15,907	101,609	117,516
At 31 March 2024	12,843	94,613	107,456

12 Debtors

	2025 £	2024 £
Prepayments	17,756	19,445

13 Creditors: amounts falling due within one year

	2025 £	2024 £
Bank overdrafts	32,545	-
Other taxation and social security	136	-
Accruals	2,724	2,664
	35,405	2,664

14 Funds

	Balance at 1 April 2024 £	Incoming resources £	Resources expended £	Balance at 31 March 2025 £
Unrestricted funds				
General				
General fund	235,265	147,922	(161,670)	221,517
Restricted funds				
Welsh Government: Section 64	-	360,000	(360,000)	-
Chester	15,498	156,361	(128,803)	43,056
	15,498	516,361	(488,803)	43,056
Total funds	250,763	664,283	(650,473)	264,573

	Balance at 1 April 2023 £	Incoming resources £	Resources expended £	Balance at 31 March 2024 £
Unrestricted funds				
General				
General fund	200,785	159,908	(125,428)	235,265
Restricted funds				
Welsh Government: Section 64	-	360,000	(360,000)	-
Chester	-	146,054	(130,556)	15,498
	-	506,054	(490,556)	15,498
Total funds	200,785	665,962	(615,984)	250,763

15 Analysis of net assets between funds

	Unrestricted funds General £	Restricted funds £	Total funds at 31 March 2025 £
Tangible fixed assets	117,516	-	117,516
Current assets	139,406	43,056	182,462
Current liabilities	(35,405)	-	(35,405)
Total net assets	221,517	43,056	264,573

Notes to the Financial Statements for the Year Ended 31 March 2025

	Unrestricted funds General £	Restricted funds £	Total funds at 31 March 2024 £
Tangible fixed assets	107,456	-	107,456
Current assets	130,473	15,498	145,971
Current liabilities	(2,664)	-	(2,664)
Total net assets	235,265	15,498	250,763

WALES MOBILITY DRIVING ASSESSMENT SERVICE

England & Wales - Charity number 1056588

Accounts

Charity registration number: 1056588

Wales Mobility Driving Assessment Service

Annual Report and Financial Statements

for the Year Ended 31 March 2024

Wales Mobility Driving Assessment Service

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Wales Mobility Driving Assessment Service

Trustees' Report

The trustees present the annual report together with the financial statements of the charity for the year ended 31 March 2024.

Structure, Governance and Management

The Wales Mobility & Driving Assessment Service (WMDAS) is located in South Wales at Rookwood, Llandaff, Cardiff and in North Wales at Ty Enfys, Ysbyty Glan Clywd, Bodelwyddan, Denbighshire. Satellite services are operated in Mid Wales based at Montgomery Hospital, Newtown and West Wales in South Pembrokeshire Community Hospital. Many people from the borders of England and Wales have traditionally been referred to the North Wales service because of geographical proximity. The North Wales Manager, Gary Jones, supported by Driving Mobility and financed by the Department for Transport (DfT) in England, developed and established a centre in Chester, Chester Driveability (CDA) to undertake assessments for the ever-increasing number of referrals from this area, an outreach centre at the Wirral has also been developed to meet the demand for the service. In Chester and the Wirral, the DfT pays an amount to meet the near actual cost for each assessment in keeping with their policy for all other English centres. DfT also fully funded the setting up costs and other WMDAS resource costs needed to establish the Chester and Wirral services.

The WMDAS is a registered Charity No. 1056588 set up under a trust deed. The service is part funded by a Welsh Government Grant under section 64 of the Health Services and Public Health Act 1968. However, as from April 2016, the format of the grant was changed from ongoing ‘core’ funding to 3 year ‘project’ funding that requires a fresh re-submission every three years as well as detailed interim reports on a half yearly basis. This funding is allocated on a yearly basis subject to the terms and conditions set by the Welsh Government (WG), one of which is attaining the targets that have been set year on year. Re-application for the grant is in competition with other charities in Wales. This format of funding makes the future of the charity less secure and will require alternative streams of funding, at best to supplement, and at worst to replace, this source of funding. The grant is for *all* Wales and the Director who is based at the South Wales Centre manages the budget for both Centres.

The South Wales Centre operates under a Service Level Agreement with the University Health Board where accommodation and utilities are provided free of charge in exchange for the services of centre staff in helping with the assessment and rehabilitation of inpatients and providing teaching to staff. The entire in-patient hospital relocated to Llandough Hospital during 2021/22 and new premises for the WMDAS have been refurbished on the NHS retained part of the Rookwood site though in a different building. The North Wales centre, located in the Ty Enfys building, pays an annual rent which includes their utilities. Both centres pay their own Telecom and other costs. Both the DVLA and Motability pay the cost for any referrals they make to either centre. In all other cases, clients are self-referring and pay a set fee towards the cost of the assessment.

The service offers both driver and passenger assessments to provide the client with a long-term mobility solution. The driving assessment is not a driving test. The aim of the assessment is to evaluate the current physical and cognitive ability of the individual to drive a motor vehicle in safety and comfort at the time of the assessment. Clients are interviewed to assess their physical abilities and background information is gathered on daily living needs. This is followed by a cognitive assessment by one of the clinical assessment team followed by an assessment in a vehicle with adaptations where necessary in off-road and on-road situations. A report and relevant leaflets and information are sent to the client within 10 days of the assessment.

Passenger assessments are undertaken for clients who experience difficulties with access to and from a vehicle. The centres have a wide range of equipment that may reduce or eliminate the physical effort involved during transfers.

The centres also provide a free information and advice service and can advise on a range of issues including DVLA, legislation, Motability schemes, driver tuition, vehicle adaptation firms, insurance companies, and much more. A WMDAS website provides access to booking and paying for assessments online.

Wales Mobility Driving Assessment Service

Trustees' Report

Objectives

To provide a high-quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living throughout Wales by enabling them to resume or remain independently mobile.

Trustees and organisational structure

The Wales Mobility & Driving Assessment Service has an Executive Committee of 7 members who meet quarterly or sooner if needed and are responsible for the strategic direction and policy of the charity. The Committee is comprised of members from a variety of backgrounds relevant to the work of the charity.

Communication between Centres. The geographical challenges of North and South Wales make road connections long and difficult and this had resulted in a degree of isolation of the centres. However in past years, we have managed to strengthen the links by several means. Due to lockdown, virtual meetings via Zoom and Teams have become the usual way to keep in touch and to hold Trustee, Staff and Management meetings. This method has proved very beneficial and now a regular occurrence. Trustees, who are mostly based in South Wales, have also been able to visit North Wales and we now have two Trustees from North Wales, who have attended meetings via Zoom. Furthermore, the Minutes of the Trustees' meetings are circulated to the North Wales Advisory committee and North and South Wales staff. Centre Managers are present at Trustee meetings together with a different staff member from either south or north Wales centres.

Funding the Service. For over 30 continuous years until the end of 2018/2019, the WMDAS main source of funding for its activities in Wales was via a (recurrent) 3-year Welsh Government grant scheme. When the focus of this 3-year grant scheme was then changed from core funding to project funding, the WMDAS was unsuccessful in its funding bid. However, the Welsh Government did decide to maintain a grant.

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a three-year funding award to WMDAS with an increased funding allocation of £360k for each of the years 2022/23, 2023/2024, 2024/25. This much welcomed and needed 3-year grant award together with the uplift in grant funding now provide WMDAS with greater stability as we move forward in developing and delivering our service provision in Wales.

The Welsh Government's grant is administered through the South Wales Centre and the Director has the overall responsibility for managing the utilisation of these grant resources throughout the WMDAS and liaising with the Welsh Government on all grant matters. In undertaking this task, the Director also ensures (on an ongoing basis) that the Trustees are kept fully and properly informed of the WMDAS' financial position.

Links with Driving Mobility. Both centres are affiliated to and accredited by Driving Mobility (DM) and work in compliance with DM Governing Documents, as well as the grant requirements stipulated by the Welsh Government and the Charity Commission. The interlinks between the two centres and Driving Mobility (DM) have also become stronger. DM is the umbrella organisation for DfT to manage policy making for the UK centres and has also been proactive in making assessment results across the centres transparent and are continually working with centres towards better standardisation and comparable outcomes.

Increased complexity of rules and regulations: There has been increased demands for complex databases and explicit written policies and procedures for evolving aspects of the law from various departments of WG, the bank and the Charity Commission as well as the existing ones for audit from DM and Dft. These cover Privacy Policies and cyber security and continues to put further time demands on the managers and the Director.

Wales Mobility Driving Assessment Service

Trustees' Report

Risk Management

The Board of Trustees has conducted a review of the major risks to which the charity is exposed and where appropriate, systems and procedures have been established to mitigate the risks the charity faces.

(1). Age of Trustees: Many of the Trustees were long serving and there was a lack of new potential Trustees seeking election over a number of years. We are now fortunate to have elected new Trustees who have different backgrounds and skills to inform our consideration. A further two Trustees were voted on the Executive Committee in 2022 who bring additional skills and expertise to the existing Board.

(2). Age of South Wales staff: The mean age of the staff in the Driving Assessment Centre in South Wales was at or above retirement age and has been ameliorated. Two staff members retired and following the employment of new staff across the service the staffing is now more representative of the working age population.

Achievements and Performance

1. *Main Service Provision and Activity.*
2. *Awareness Training and Teaching:*

Coronavirus resulted in the centres' closure which is reflected in the table below:

STATISTICS:

The overall numbers of clients assessed between 1 April 2023 and March 31 2024

No of Assessments	South/West Wales	North/Mid Wales	Chester	Total
2017/18	565	310	108	983
2018/19	583	232	152	967
2019/20	615	290	159	1064
2020/21	237	91	44	371
2022/23	538	272	201	1011
2023/24	557	302	262	1121
Total	**3095**	**1497**	**926**	**5518**

Of the 1121 assessments in 2023/24(including Chester/Wirral): **88** were review driving assessments who are assessed to ascertain their ability to remain driving in safety and so preserve their independence for as long as possible.

Referral sources in 2023/24: Self / family:459 DVLA:312 Motability MoMap: 181 NHS/Health Professionals: 122 Social Services:27: Fit to Drive 41

a) Customer Satisfaction Survey

This year's Survey again shows WMDAS is fulfilling the expectations and needs of clients (with 98% of respondents marking satisfied and very satisfied with the service)

To ensure a representative view of service users, irrespective of the outcome of their assessment, a Customer Satisfaction Survey was sent to all clients who had attended between April 2023 to March 2024. However, in cases that had potential to cause distress to the client or client families, a decision was made to withdraw these

individuals from circulation of this survey. This refers to clients who have attended for assessment and who have no insight into their deficits caused by cognitive decline. It also refers to clients who have attended but have passed away. Clients who returned for review are not routinely sent a CSS as some attend at 6 monthly intervals. NW includes outcomes for Mid and North Wales, South Wales includes West Wales outcome.

The full set of data gathered during 2023/24 can be viewed on request. A summary of the data is contained in the Director of Services report.

(b) Chester Driveability

Gary Jones has successfully developed a thriving new driving assessment centre in Chester which has gone from strength to strength to meet an expanding demand from this part of England that hitherto has been directed to the North Wales centre. During 2022, Gary prepared a Chester Driveability Business Plan for the 3 years 2022/23 to 2024/25 which set out how the service provided at Chester could be further developed and expanded to meet client demand. This Plan was agreed by WMDAS, Driving Mobility and the Department for Transport and its implementation is now proceeding with an outreach service at the Wirral developed and operational in 2023. From April 2025 the contract between WMDAS and DM to run the service in Chester ceases and therefore discussions will need to be discussed with DM who currently "own" the Chester centre to decide future arrangements.

(c) *Adapted – Vehicle Driver Training Service*

The driver training service has been expanded to service clients with mobility problems. **159** clients received this service with **807** hours of driver training in a range of adapted vehicles during 2023/24. This service has proved extremely popular and has provided a lifeline to those with disabilities as prior to WMDAS developing this service, there were almost no driving schools with the expertise or adapted cars to accommodate those who are unable or unsafe to drive in the conventional manner. This useful service is also a revenue raising activity for WMDAS.

(d) Older Driver Fitness to Drive pilot scheme.

This is a joint WMDAS / Police initiative that aims to assess fitness to drive in older drivers who have been reported for committing a road traffic offence. The Older Driver Fitness to Drive scheme was suspended because of Coronavirus during 2020/21 and remained suspended for some months in to the 2021/22 period. Referrals resumed in 2022 from Dyfed Powys Police but have not reached the referral rate received prior to the Pandemic closure due to operational changes within the force. Following a recommendation from the Coroner at Swansea Crown Court, South Wales Police expressed a wish to use our service followed by enquiries from Gwent Police. Negotiations have been completed and WMDAS began accepting referrals from South Wales Police from January 2023. After extensive negotiations North Wales Police have joined the scheme and are now referring to the North Wales centre. **22** Police Fit to Drive assessments were completed in 2023-24.

There were 12 training sessions for staff held during this financial year. This included First Aid/ Manual handling, / Disability Awareness/ Vehicle Adaptations/ Expert Witness/High Tech Training/HR/ Seating & Posture and Wheelchair Accessible training.

(a) *Open Days* – These have not been resumed but the Cardiff centre held an official opening day of their new premises in July 2023 at which numerous guests were invited. An Open Day is planned for July 2024 at the Maindy cycle track in Cardiff where adapted vehicles will be available for those who thought they may never be able to drive. Visitors will be given the opportunity to try vehicles and speak to assessment staff. The event will be held in conjunction with SHINE the Hydrocephalus charity.

(b) *Clinical staff training*.

(c) *Awareness training for other individuals and organisations.* These take the form of presentations and demonstrations and have been given to memory clinic staff, neuromuscular clinics, Driving Instructors, Dementia Awareness Group, World Stroke Day, National Brain Injury Conference(in the Liberty Stadium) and the National Dwarfism Conference at the Seneydd.

.

Both the North and South Wales centre hosted awareness and presentation sessions for clinical staff and medical advisors including the DVLA, Brain Injury teams, Occupational Therapists, Headway, Community Support workers, Psychologists.

Continuing Professional Development

Three members of staff (North & South Wales) completed their final modules of study Driving Mobility Academic Programme Oxford Brookes University towards the award of *Certificate of Higher Education – Driving Assessment and Outdoor Mobility.* Each student graduated from Oxford Brookes University in May 2023. Staff have also completed the following Continuing Professional Development.

- Bugzi Assessor Training
- Oxford Brookes Affiliate Lecture Training
- DM Education Programme – Assistive Technology
- Hubs Information Provider Training
- Electric Vehicle On-Line Training
- AutoAdapt/Elap Vehicle Product Demonstration
- Supervision, Support & Appraisals
- HR
- High Tech Training
- Expert Witness

Vehicle and Office Equipment Renewal.

Prior to the South Wales reaccreditation, office and assessment equipment and vehicles were updated and maintained in accordance with criteria set by Driving Mobility to maintain accreditation status. North Wales regained accreditation in 2022.

The South Wales Centre attained accreditation in December 2023. There is an ongoing vehicle replacement policy with vehicles sourced at half trade prices (to mobility centres only) from Motability.

Telecoms and office equipment were renewed/purchased in both centres as required with a planned networking system between North and South Wales in progress. New emails are planned with staff at both centres having the same wmdas email addresses.

Financial Review

The principal funding source of the Charity in 2023-24 remained the Welsh Government under their ‘stand-alone’ grant funding arrangements. Salaries and earnings-related costs including the Government Pension Scheme introduced in January 2017 continue to represent the largest element of expenditure, details of which can be found in the Statement of Financial Activities. 2024-25 is the final year of our current financial grant support from the Welsh Government. During 2024, the Director and Trustees will be discussing with Welsh Government our grant funding arrangements for 2025-26 and beyond.

The pressures on our financial stability and future resilience as a consequence of the Welsh Government's grant funding regime arrangements have increased year by year and have acted as a constraint on meeting client demand for our services. The free assessment through the NHS referral pathway remains closed and all clients continue to pay for their assessments apart from those who are in-patients and are assessed and as part of their care package.

Clients are given the option of referral through Motability or DVLA if they feel unable to afford the cost of the assessment.

The level of the Charity's assessment fee has been kept under critical review and was increased in 2023 to £130. At this fee level, clients still only meet a proportion of the real cost of an assessment which is estimated to be well over £500. There will be ongoing pressures on both expenditure and income over future years as the demand for our services continues to grow.

As an organisation we have strived to employ the necessary staff resources to meet our assessment demand. As necessary, we have utilised our reserves to fill any funding gaps for employing staff. This, together with the impacts of Covid, had led to our end year reserves reducing over previous years. During 2023-24 a modest increase to our reserves was achieved, but to secure greater organisational financial resilience remains one of our key aims. To this end the Director and Trustees will continue to seek to grow our reserves but we will need stability and certainty on our annual costs and not the inflationary and other cost pressures that we encountered during previous years. In addition, we must also achieve our agreed assessment targets to realise our in-year income projections. During 2023-24, we unfortunately did not meet our assessment target for Chester and had to repay monies to DM. Our hope is that improving cost stability and income certainty over the coming years will ensure that our reserves position will continue to improve. The Director and Trustees will monitor our income and expenditure across the range of our organisation's activities. Proposals for any new activity will need to be considered against our other service delivery priorities and also demonstrate that they are cost effective and affordable.

All the 2023-24 Welsh Government funding was used as agreed and budgeted as detailed in the Business Plan with some adjustments to meet unplanned events.

The opening balance in the current account on April 1st,2023 was £66,081 and the closing balance on March 31st 2024 was £17,142

Reserves policy

It is the policy of the charity to work towards accumulating unrestricted funds not committed or invested in tangible fixed assets representing between three and six months of expenditure. Generally, this represents having reserves in the range of some £150,000 to £300,00. At this level the Trustees consider that sufficient unrestricted reserves would be in place to cope with planned or emergency replacement of capital equipment, and the activities of the charity could continue in the event of a sudden drop in funding and/or increase in expenditure. Further information on our reserves position is outlined in the Financial Review section above.

Wales Mobility Driving Assessment Service

Trustees' Report

Plans for future periods

As part of the accreditation process WMDAS was asked to produce a Strategic 3 Year Business Plan.

The Plan is available on request but in summary, dependent on funding it is planned to open outreach centres in Llanelli and in North-West Wales.

Driver Training for those who have been assessed and need practise of driving in a new way using adaptations has been developed and proved extremely popular. There are few driving schools who have vehicles with adaptations therefore the centres use their vehicles and their experienced driving instructors to provide this essential service.

This provides a small additional revenue for WMDAS.

Trustees and officers

The trustees and officers serving during the year and since the year end were as follows:

Trustees:	Dr M Stevenson
	Mr J Carter
	Ms L Harrington
	Mr P Brewer
	Ms J McKinlay
	Ms C S Sowden-Taylor
	Mr D Hughes

Reference and Administrative Details

Charity Registration Number:	1056588
Principal Office:	Rookwood Hospital Fairwater Road Llandaff Cardiff CF5 2YN
Independent Examiner:	HSJ Accountants Limited Severn House Hazell Drive Newport NP10 8FY
Bankers:	Lloyds Bank 514 Cowbridge Road East Victoria Park Cardiff CF5 1BL

Wales Mobility Driving Assessment Service

Trustees' Report

Statement of Trustees' Responsibilities

The trustees are responsible for preparing the trustees' report and the financial statements in accordance with the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

The law applicable to charities requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

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

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The annual report was approved by the trustees of the charity on ..... and signed on its behalf by:

.....
Dr M Stevenson
Chairman and trustee

.....
Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Independent Examiner's Report to the trustees of Wales Mobility Driving Assessment Service

I report to the trustees on my examination of the accounts of Wales Mobility Driving Assessment Service for the year ended 31 March 2024.

Responsibilities and basis of report

As the charity trustees of Wales Mobility Driving Assessment Service you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Wales Mobility Driving Assessment Service's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

Since Wales Mobility Driving Assessment Service's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of FCCA ACA DChA BFP, which is one of the listed bodies.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of Wales Mobility Driving Assessment Service as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

.....
Mr Andrew Hill
FCCA ACA DChA BFP

Severn House
Hazell Drive
Newport
NP10 8FY

Date:.....

Wales Mobility Driving Assessment Service

Statement of Financial Activities for the Year Ended 31 March 2024

	Note	Unrestricted funds £	Restricted funds £	Total 2024 £
Income and Endowments from:				
Donations and legacies		9,706	-	9,706
Charitable activities		149,158	506,054	655,212
Investment income	4	1,044	-	1,044
Total income		159,908	506,054	665,962
Expenditure on:				
Charitable activities		(125,428)	(490,556)	(615,984)
Total expenditure		(125,428)	(490,556)	(615,984)
Net income		34,480	15,498	49,978
Net movement in funds		34,480	15,498	49,978
Reconciliation of funds				
Total funds brought forward		200,785	-	200,785
Total funds carried forward	14	235,265	15,498	250,763

	Note	Unrestricted funds £	Restricted funds £	Total 2023 £
Income and Endowments from:				
Donations and legacies		6,360	-	6,360
Charitable activities		149,661	437,966	587,627
Investment income	4	584	-	584
Total income		156,605	437,966	594,571
Expenditure on:				
Charitable activities		(155,645)	(437,966)	(593,611)
Total expenditure		(155,645)	(437,966)	(593,611)
Net income		960	-	960
Net movement in funds		960	-	960
Reconciliation of funds				
Total funds brought forward		199,825	-	199,825
Total funds carried forward	14	200,785	-	200,785

All of the charity's activities derive from continuing operations during the above two periods.

The funds breakdown for 2023 is shown in note 14.

Wales Mobility Driving Assessment Service

(Registration number: 1056588)
Balance Sheet as at 31 March 2024

	Note	2024 £	2023 £
Fixed assets			
Tangible assets	11	107,456	105,823
Current assets			
Debtors	12	19,445	14,685
Cash at bank and in hand		126,526	82,941
		145,971	97,626
Creditors: Amounts falling due within one year	13	(2,664)	(2,664)
Net current assets		143,307	94,962
Net assets		250,763	200,785
Funds of the charity:			
Restricted income funds			
Restricted funds		15,498	-
Unrestricted income funds			
Unrestricted funds		235,265	200,785
Total funds	14	250,763	200,785

The financial statements on pages 10 to 19 were approved by the trustees, and authorised for issue on ..... and signed on their behalf by:

.....
Dr M Stevenson
Chairman and trustee

.....
Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Notes to the Financial Statements for the Year Ended 31 March 2024

1 Accounting policies

Exemption from preparing a cash flow statement
The charity opted to early adopt Bulletin 1 published on 2 February 2016 and have therefore not included a cash flow statement in these financial statements.

Income and endowments

Donations and legacies

Donations are recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Gifts in kind

Donated goods and services are recognised in both income and expenditure at fair value at the date on which the benefit is received.

Investment income

Investment income is recogised on a receivable basis.

Charitable activities

Income from charitable activities includes income recognised as earned (as the related goods or senrices are provided) under contract or where entifiement to grant funding is subject to specific performance conditions. Grant income included in this category provides funding to support programme activities and is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Expenditure
All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category. Where costs cannot be directly attributed to particular headings they have been allocated on a basis consistent with the use of resources, with central staff costs allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use. Other support costs are allocated based on the spread of staff costs.

Charitable activities

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

Support costs
Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources, for example, allocating property costs by floor areas, or per capita, staff costs by the time spent and other costs by their usage.

Governance costs
These include the costs attributable to the charity's compliance with constitutional and statutory requirements, including audit, strategic management and trustees's meetings and reimbursed expenses.

Taxation
The charity is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the charity is potentially exempt from taxation in respect of income or capital gains received within categories covered by Chapter 3 Part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

Tangible fixed assets
Individual fixed assets costing £1,000.00 or more are initially recorded at cost.

Depreciation and amortisation
Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Asset class	Depreciation method and rate
Fixtures & fittings	20% on reducing balance
Motor vehicles	25% on reducing balance
Computer equipment	25% on reducing balance

Cash and cash equivalents
Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

Fund structure
Unrestricted income funds are general funds that are available for use at the trustees's discretion in furtherance of the objectives of the charity.

Restricted income funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Pensions and other post retirement obligations
The charity operates a defined contribution pension scheme which is a pension plan under which fixed contributions are paid into a pension fund and the charity has no legal or constructive obligation to pay further contributions even if the fund does not hold sufficient assets to pay all employees the benefits relating to employee service in the current and prior periods.

Contributions to defined contribution plans are recognised in the Statement of Financial Activities when they are due. If contribution payments exceed the contribution due for service, the excess is recognised as a prepayment.

2 Income from donations and legacies

	Unrestricted General £	Total 2024 £	Total 2023 £
Donations and legacies;			
Donated assets and services	9,106	9,106	4,620
Donations from individuals	600	600	1,740
	9,706	9,706	6,360

3 Income from charitable activities

	Unrestricted funds General £	Restricted funds £	Total 2024 £	Total 2023 £
Assessment and advice services	149,158	506,054	655,212	587,627

	Unrestricted funds General £	Restricted funds £	Total 2024 £	Total 2023 £
Assessment fees - Wales	116,735	-	116,735	115,489
Assessment fees - Chester	-	136,072	136,072	77,966
Welsh Government	-	360,000	360,000	360,000
Lessons	32,423	-	32,423	34,172
Development Funds - Chester	-	9,982	9,982	-
	149,158	506,054	655,212	587,627

4 Investment income

	Unrestricted funds General £	Total 2024 £	Total 2023 £
Interest receivable and similar income;			
Interest receivable on bank deposits	1,044	1,044	584

5 Expenditure on charitable activities

	Note	Unrestricted funds General £	Restricted funds £	Total 2024 £	Total 2023 £
Assessment and advice services		97,406	57,597	155,003	150,733
Staff costs		24,427	430,710	455,137	438,745
Governance costs		3,595	2,249	5,844	4,133
		125,428	490,556	615,984	593,611

6 Analysis of governance and support costs

Support costs allocated to charitable activities

	Basis of allocation	Information technology £	Staff costs £	Administration costs £	Total 2024 £
Assessment and advice services	A	5,000	136,500	34,000	175,500

	Basis of allocation	Staff costs £	Administration costs £	Premises costs including depreciation £	Total 2023 £
Assessment and advice services	A	109,688	3,942	9,105	122,735

Basis of allocation

Reference	Method of allocation
A	Caluclated at a rate of 25% support time incurred

7 Trustees remuneration and expenses

No trustees, nor any persons connected with them, have received any remuneration from the charity during the year.

No trustees have received any reimbursed expenses or any other benefits from the charity during the year.

8 Staff costs

The aggregate payroll costs were as follows:

	2024 £	2023 £
Staff costs during the year were:		
Wages and salaries	414,024	397,860
Social security costs	33,937	33,618
Pension costs	7,176	7,267
	455,137	438,745

The monthly average number of persons (including senior management / leadership team) employed by the charity during the year expressed as full time equivalents was as follows:

	2024 No	2023 No
Assessment services	12	13

No employee received emoluments of more than £60,000 during the year

9 Independent examiner's remuneration

	2024 £	2023 £
Examination of the financial statements	2,514	3,620

10 Taxation

The charity is a registered charity and is therefore exempt from taxation.

11 Tangible fixed assets

	Furniture and equipment £	Motor vehicles £	Total £
Cost			
At 1 April 2023	231,187	195,738	426,925
Additions	-	52,814	52,814
Disposals	(210,238)	(54,091)	(264,329)
At 31 March 2024	20,949	194,461	215,410
Depreciation			
At 1 April 2023	209,906	111,196	321,102
Charge for the year	8,438	29,022	37,460
Eliminated on disposals	(210,238)	(40,370)	(250,608)
At 31 March 2024	8,106	99,848	107,954
Net book value			
At 31 March 2024	12,843	94,613	107,456
At 31 March 2023	21,281	84,542	105,823

12 Debtors

	2024 £	2023 £
Prepayments	19,445	14,685

13 Creditors: amounts falling due within one year

	2024 £	2023 £
Accruals	2,664	2,664

14 Funds

	Balance at 1 April 2023 £	Incoming resources £	Resources expended £	Balance at 31 March 2024 £
Unrestricted funds				
General				
General fund	200,785	159,908	(125,428)	235,265
Restricted funds				
Welsh Government: Section 64	-	360,000	(360,000)	-
Chester	-	146,054	(130,556)	15,498
	-	506,054	(490,556)	15,498
Total funds	200,785	665,962	(615,984)	250,763

	Balance at 1 April 2022 £	Incoming resources £	Resources expended £	Balance at 31 March 2023 £
Unrestricted funds				
General				
General fund	199,825	156,605	(155,645)	200,785
Restricted funds				
Welsh Government: Section 64	-	360,000	(360,000)	-
Chester	-	77,966	(77,966)	-
	-	437,966	(437,966)	-
Total funds	199,825	594,571	(593,611)	200,785

15 Analysis of net assets between funds

	Unrestricted funds General £	Restricted funds £	Total funds at 31 March 2024 £
Tangible fixed assets	107,456	-	107,456
Current assets	130,473	15,498	145,971
Current liabilities	(2,664)	-	(2,664)
Total net assets	235,265	15,498	250,763

Notes to the Financial Statements for the Year Ended 31 March 2024

	Unrestricted funds General £	Total funds at 31 March 2023 £
Tangible fixed assets	105,823	105,823
Current assets	97,626	97,626
Current liabilities	(2,664)	(2,664)
Total net assets	200,785	200,785

WALES MOBILITY DRIVING ASSESSMENT SERVICE

England & Wales - Charity number 1056588

Accounts

Charity registration number: 1056588

Wales Mobility Driving Assessment Service

Annual Report and Financial Statements

for the Year Ended 31 March 2023

Wales Mobility Driving Assessment Service

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Wales Mobility Driving Assessment Service

Trustees' Report

The Trustees present their report and financial statements of the charity for the year ended 31st March 2023

Structure, Governance and Management

The Wales Mobility & Driving Assessment Service (WMDAS) is located in South Wales at Rookwood, Llandaff, Cardiff and in North Wales at the Disability Resource Centre, Ysbyty Glan Clywd, Bodelwyddan, Denbighshire. Satellite services are operated in Mid Wales based at Montgomery Hospital, Newtown and West Wales in South Pembrokeshire Community Hospital. Many people from the borders of England and Wales have traditionally been referred to the North Wales service because of geographical proximity. The North Wales Manager, Gary Jones, supported by Driving Mobility and financed by the Department for Transport (DfT) in England, developed and established a centre in Chester, Chester Driveability (CDA) to undertake assessments for the ever-increasing number of referrals from this area. In Chester, the DfT pays an amount to meet the near actual cost for each assessment in keeping with their policy for all other English centres. DfT also fully funded the setting up costs and other WMDAS resource costs needed to establish the Chester service

The WMDAS is a registered Charity No. 1056588 set up under a trust deed. The service is part funded by a Welsh Government Grant under section 64 of the Health Services and Public Health Act 1968. However, as from April 2016, the format of the grant was changed from ongoing 'core' funding to 3 year 'project' funding that requires a fresh re-submission every three years as well as detailed interim reports on a half yearly basis. This funding is allocated on a yearly basis subject to the terms and conditions set by the Welsh Government (WG), one of which is attaining the targets that have been set year on year. Re-application for the grant is in competition with other charities in Wales. This format of funding makes the future of the charity less secure and will require alternative streams of funding, at best to supplement, and at worst to replace, this source of funding. The grant is for *all* Wales and the Director who is based at the South Wales Centre manages the budget for both Centres.

The South Wales Centre operates under a Service Level Agreement with the University Health Board where accommodation and utilities are provided free of charge in exchange for the services of centre staff in helping with the assessment and rehabilitation of inpatients and providing teaching to staff. The entire in-patient hospital relocated to Llandough Hospital during 2021/22 and new premises for the WMDAS have been refurbished on the NHS retained part of the Rookwood site though in a different building. The North Wales centre, located in The Disability Resource Centre, pays an annual rent which includes their utilities. Both centres pay their own Telecom and other costs. Both the DVLA and Motability pay the cost for any referrals they make to either centre. In all other cases, clients are self-referring and pay a set fee towards the cost of the assessment.

The service offers both driver and passenger assessments to provide the client with a long-term mobility solution. The driving assessment is not a driving test. The aim of the assessment is to evaluate the current physical and cognitive ability of the individual to drive a motor vehicle in safety and comfort at the time of the assessment. Clients are sometimes assessed or their reaction times, steering strengths and to determine what adaptations (if any) are required. Clients are then assessed in a vehicle with adaptations where necessary in off-road and on-road situations. A report and relevant leaflets and information are sent to the client within 10 days of the assessment.

Passenger assessments are undertaken for clients who experience difficulties with access to and from a vehicle. The centres have a wide range of equipment that may reduce or eliminate the physical effort involved during transfers.

The centres also provide a free information and advice service and can advise on a range of issues including DVLA, legislation, Motability schemes, driver tuition, vehicle adaptation firms, insurance companies, and much more. A WMDAS website provides access to booking and paying for assessments online.

Wales Mobility Driving Assessment Service

Trustees' Report

Objectives

To provide a high-quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living throughout Wales by enabling them to resume or remain independently mobile.

Trustees and organisational structure

The Wales Mobility & Driving Assessment Service has an Executive Committee of 9 members who meet quarterly or sooner if needed and are responsible for the strategic direction and policy of the charity. The Committee is comprised of members from a variety of backgrounds relevant to the work of the charity.

Communication between Centres. The geographical challenges of North and South Wales make road connections long and difficult and this had resulted in a degree of isolation of the centres. However in past years, we have managed to strengthen the links by several means. Due to lockdown, Virtual Zoom and Teams have become the usual way to keep in touch and to hold Trustee, Staff and Management meetings. This method has proved very beneficial and now a regular occurrence. Trustees, who are mostly based in South Wales, have also been able to visit North Wales and we now have three Trustees from North Wales, who have attended meetings via Zoom. Furthermore, the Minutes of the Trustees' meetings are circulated to the North Wales Advisory committee, the North Wales Manager and North Wales and South Wales staff. Centre Managers are present at Trustee meetings.

Funding the Service. For over 30 continuous years until the end of 2018/2019, the WMDAS main source of funding for its activities in Wales was via a (recurrent) 3-year Welsh Government grant scheme. When the focus of this 3-year grant scheme was then changed from core funding to project funding, the WMDAS was unsuccessful in its funding bid. However, the Welsh Government did decide to maintain a grant.

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a three-year funding award to WMDAS with an increased funding allocation of £360k for each of the years 2022/23, 2023/2024, 2024/25. This much welcomed and needed 3-year grant award together with the uplift in grant funding now provide WMDAS with greater stability as we move forward in developing and delivering our service provision in Wales.

The Welsh Government's grant is administered through the South Wales Centre and the Director has the overall responsibility for managing the utilisation of these grant resources throughout the WMDAS and liaising with the Welsh Government on all grant matters. In undertaking this task, the Director also ensures (on an ongoing basis) that the Trustees are kept fully and properly informed of the WMDAS' financial position.

Links with Driving Mobility. Both centres are affiliated to and accredited by Driving Mobility (DM) and work in compliance with DM Governing Documents, as well as the grant requirements stipulated by the Welsh Government and the Charity Commission. The interlinks between the two centres and Driving Mobility (DM) have also become stronger. DM is the umbrella organisation for DfT to manage policy making for the UK centres and has also been proactive in making assessment results across the centres transparent and are continually working with centres towards better standardisation and comparable outcomes.

Increased complexity of rules and regulations**:** There has been increased demands for complex databases and explicit written policies and procedures for evolving aspects of the law from various departments of WG, the bank and the Charity Commission as well as the existing ones for audit from DM and Dft. These cover Privacy Policies and cyber security This continues to put further time demands on the managers and the Director.

Wales Mobility Driving Assessment Service

Trustees' Report

Risk Management

The Board of Trustees has conducted a review of the major risks to which the charity is exposed and where appropriate, systems and procedures have been established to mitigate the risks the charity faces.

(1). Age of Trustees: Many of the Trustees were long serving and there was a lack of new potential Trustees seeking election over a number of years. We are now fortunate to have elected new Trustees who have different backgrounds and skills to inform our consideration. A further two Trustees have been voted on the Executive Committee in 2022 who bring additional skills and expertise to the existing Board.

(2). Age of South Wales staff: The mean age of the staff in the Driving Assessment Centre in South Wales was at or above retirement age and has been ameliorated. Two staff members retired and following the employment of new staff across the service the staffing is now more representative of the working age population.

Achievements and Performance

1. *Main Service Provision and Activity.*
2. *Awareness Training and Teaching:*

Coronavirus resulted in the centres' closure for 6 weeks at the beginning 2021/22. Nevertheless, all targets were met

STATISTICS:

The overall numbers of clients assessed between 1 April 2021 and March 31 2022

No of Assessments	South/West Wales	North/Mid Wales	Chester	Total
2017/18	565	310	108	983
2018/19	583	232	152	967
2019/20	615	290	159	1064
2020/21	237	91	44	371
2022/23	538	272	201	1011
Total	**2538**	**1195**	**664**	**4396**

Of the 1011 assessments in 2022/23: **92** were review driving assessments who are assessed to ascertain their ability to remain driving in safety and so preserve their independence for as long as possible.

Referral sources in 2022/23: Self / family:444 DVLA:258Motability MoMap: 129 NHS/Health Professionals: 102 Social Services:19: Fit to Drive 10

Wales Mobility Driving Assessment Service

Trustees' Report

a) Customer Satisfaction Survey

This year's Survey again shows WMDAS is fulfilling the expectations and needs of clients (with 98% of respondents marking satisfied and very satisfied with the service).

To ensure a representative view of service users, irrespective of the outcome of their assessment, a Customer Satisfaction Survey was sent to all clients who had attended between April 2022 to March 2023. However, in cases that had potential to cause distress to the client or client families, a decision was made to withdraw these individuals from circulation of this survey. This refers to clients who have attended for assessment and who have no insight into their deficits caused by cognitive decline. It also refers to clients who have attended but have passed away. Clients who returned for review are not routinely sent a CSS as some attend at 6 monthly intervals. NW includes outcomes for Mid and North Wales, South Wales includes West Wales outcome.

The full set of data gathered during 2022/23 can be viewed on request. A summary of the data is contained in the Director of Services report.

(b) Chester Driveability

Gary Jones has successfully set up a thriving new driving assessment centre in Chester which has gone from strength to strength to meet an expanding demand from this part of England that hitherto has been directed to the North Wales centre. During 2021, Gary prepared a Chester Driveability Business Plan for the 3 years 2022/23 to 2024/25 which set out how the service provided at Chester could be further developed and expanded to meet client demand. This Plan was agreed by WMDAS, Driving Mobility and the Department for Transport and its implementation is now proceeding.

(c) *Adapted – Vehicle Driver Training Service*

The driver training service has been expanded to service clients with mobility problems. **142** clients received this service with **970** hours of driver training in a range of adapted vehicles during 2022/23. This service has proved extremely popular and has provided a lifeline to those with disabilities as prior to WMDAS developing this service, there were almost no driving schools with the expertise or adapted cars to accommodate those who are unable or unsafe to drive in the conventional manner. This useful service is also a revenue raising activity for WMDAS.

(d) *Older Driver Development Programme*

The service developed with Denbighshire County Council and neighbouring counties was suspended in 2021/22 because of Covid and Government restrictions and to date has not been resumed.

(e) Older Driver Fitness to Drive pilot scheme.

This initiative is a joint WMDAS / Dyfed Police project that aims to assess fitness to drive in older drivers who have been reported for committing a road traffic offence. The Older Driver Fitness to Drive scheme was suspended because of Coronavirus during 2020/21 and remained suspended for some months in to the 2021/22 period. Referrals resumed in 2022 from Dyfed Powys Police but have not reached the referral rate received prior to the Pandemic closure. Following a recommendation from the Coroner at Swansea Crown Court, South Wales Police expressed a wish to use our service followed by enquiries from Gwent Police. Negotiations have been completed and WMDAS began accepting referrals from South Wales Police from January 2023.

(f) Welsh Rugby Union Charitable Fund. Links were made between the South Wales Centre and the WRU Charitable Fund who referred their clients to the centre for specialist help with mobility and driving needs but there have been no referrals during 2022-2023.

Wales Mobility Driving Assessment Service

Trustees' Report

There were 16 training /awareness sessions held during this financial year. It was a slow start and the relocation of the Cardiff Centre was a major upheaval followed by 6 weeks of intermittent internet and telecom issues but as soon as restrictions regarding Covid were relaxed, the centres resumed providing training and awareness days.

(a) *Open Days* – These have not been resumed but are planned for 2023/2024

(b) *Clinical staff training*.

(c) *Awareness training for other individuals and organisations.* These take the form of presentations and demonstrations and have been given to memory clinic staff, neuromuscular clinics, Driving Instructors and those working in the Community for example Care Homes.

.

In South Wales, clinical staff and medical advisors from the DVLA have had one-to-one observation sessions. Numerous clinical staff from Brain Injury teams, Occupational Therapists, Headway, Community Support workers, Psychologists have attended.

Continuing Professional Development

Three members of staff (North & South Wales) completed their final modules of study Driving Mobility Academic Programme Oxford Brookes University towards the award of *Certificate of Higher Education – Driving Assessment and Outdoor Mobility.* Each student will graduate from Oxford Brookes University late May 2023. Staff have also completed the following Continuing Professional Development.

- Bugzi Assessor Training
- Oxford Brookes Affiliate Lecture Training
- DM Education Programme – Assistive Technology
- Hubs Information Provider Training
- Electric Vehicle On-Line Training
- AutoAdapt/Elap Vehicle Product Demonstration

Vehicle and Office Equipment Renewal.

Prior to the South Wales reaccreditation in 2021, office and assessment equipment and vehicles were updated and maintained in accordance with criteria set by Driving Mobility to maintain accreditation status. The centres in Newtown and Pembroke Dock gained accreditation in 2019 and therefore due for re accreditation in 2023. North Wales regained accreditation in 2022.

South Wales were informed that although their accreditation was completed in 2021 it had been delayed because of Covid and has therefore been scheduled for a return visit and reaccreditation in 2023.

Telecoms and office equipment were renewed/purchased in both centres. South Wales in particular had extensive telecom work / equipment renewals due to its relocation.

Wales Mobility Driving Assessment Service

Trustees' Report

Financial Review

The principal funding source of the Charity in 2020-21 remained the Welsh Government under their 'project' grant funding arrangements. Within the conditions of the grant, for the 3 years 2016-17 to 2018-19 our overall grant was reduced by 5% each year and our 2019-20, 2020-21 and 2021-22 grant funding was maintained at the 2018-19 level of £265,000 per annum which represents further real term cuts. By comparison, centres in England financed by the DfT, have received an annual increase in funding over the same period. Salaries and earnings-related costs including the Government Pension Scheme introduced in January 2017 continue to represent the largest element of expenditure, details of which can be found in the Statement of Financial Activities. The pressures on our financial stability and future sustainability as a consequence of the Welsh Government's grant funding regime arrangements have increased year by year and have acted as a constraint on meeting client demand for our services. The free assessment through the NHS referral pathway remains closed and all clients continue to pay for their assessments apart from those who are in-patients and are assessed and as part of their care package.

Clients are given the option of referral through Motability or DVLA if they feel unable to afford the cost of the assessment.

The level of the Charity's assessment fee has been kept under critical review and was increased in 2022 to £125. At this fee level, clients still only meet a proportion of the real cost of an assessment which is estimated to be well over £500. There will be ongoing pressures on both expenditure and income over future years as the demand for our services continues to grow. As an organisation we have strived to employ the necessary staff resources to meet our assessment demand. As necessary, we have utilised our reserves to fill any funding gaps for employing staff. This had led to our end year reserves reducing over the last few years to a level that, while still being in surplus, need addressing. To increase our reserves, we need stability and certainty on our annual costs and not the inflationary and other cost pressures that we encountered during 2022-23. Our hope is that such cost stability and certainty will improve over the next two years so that during 2025-26 the position with our reserves will improve. The Director and Trustees will continue to monitor our income and expenditure across the range of our organisation's activities.

Proposals for any new activity will need to be considered against our other service delivery priorities and also demonstrate that they are cost effective and affordable.

All the 2022-23 Welsh Government funding was used as agreed and budgeted as detailed in the Business Plan with some adjustments to meet unplanned events.

The opening balance in the current account on April 1st,2022 was £66,502 and the closing balance on March 31st 2023 was £16,915

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a 3-year grant award to WMDAS with an increased funding level of £360,000 for each of the years 2022-23 to 2024-25. WMDAS were delighted with this news and the additional resources were used to employ additional staff and to mitigate inflation and other cost pressures.

Reserves policy

It is the general policy of the charity to work towards accumulating unrestricted funds not committed or invested in tangible fixed assets representing between three and six months of expenditure. At this level the Trustees consider that sufficient unrestricted reserves would be in place to cope with planned or emergency replacement of capital equipment, and the activities of the charity could continue in the event of a sudden drop in funding and/or increase in expenditure. Further information on our reserves position is outlined in the Financial Review section above.

Trustees' Report

Plans for future periods

Welsh Government funding was allocated for three years to allow the option to employ additional staff to process additional assessments forecast to be generated by referrals from South Wales and Gwent Police forces. Service Level Agreement with South Wales Police was not finalised until December 2022 and referrals from this source to date has not reached the levels expected. It was also planned that once trained additional staff would allow the waiting list of currently 10 weeks to be decreased in South Wales but it remains at a 10 week waiting list because demand for driving assessment has increased and also due to late cancellations because of Covid affecting both clients and staff.

The new premises in Cardiff has provided much improved facilities and space for assessment teams and admin staff.

The new premises provide electric points for the use of electric vehicles which the Cardiff centre hopes to obtain once funds allow.

In North Wales, the present premises are not able to offer electrical outlets for electric vehicles and the car parking situation presents accessing difficulties for visitors and clients. During 2022/23 alternative premises will be explored and costed.

Driver Training for those who have been assessed and need practise of driving in a new way using adaptations has been developed and proved extremely popular. There are few driving schools who have vehicles with adaptations therefore the centres use their vehicles and their experienced driving instructors to provide this essential service.

This provides a small additional revenue for WMDAS.

Trustees and officers

The trustees and officers serving during the year and since the year end were as follows:

Trustees:	Dr M Stevenson
	Dr P McKenna
	Mr J Carter
	Ms L Harrington
	Mr P Brewer
	Ms J McKinlay
	Ms C S Sowden-Taylor
	Mr D Hughes
	Mrs A Duckworth
Chairman:	Dr M Stevenson
Secretary:	Dr P McKenna

Wales Mobility Driving Assessment Service

Trustees' Report

Reference and Administrative Details

Charity Registration Number:	1056588
Principal Office:	Rookwood Hospital Fairwater Road Llandaff Cardiff CF5 2YN
Independent Examiner:	HSJ Accountants Limited Severn House Hazell Drive Newport NP10 8FY
Bankers:	Lloyds Bank 514 Cowbridge Road East Victoria Park Cardiff CF5 1BL

Wales Mobility Driving Assessment Service

Trustees' Report

Statement of Trustees' Responsibilities

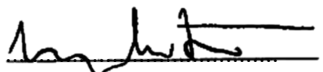
The trustees are responsible for preparing the trustees' report and the financial statements in accordance with the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

The law applicable to charities requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

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

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The annual report was approved by the trustees of the charity on 12 June 2023 and signed on its behalf by:



Dr M Stevenson
Chairman and trustee

Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Independent Examiner's Report to the trustees of Wales Mobility Driving Assessment Service

I report to the trustees on my examination of the accounts of Wales Mobility Driving Assessment Service for the year ended 31 March 2023.

Responsibilities and basis of report

As the charity trustees of Wales Mobility Driving Assessment Service you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Wales Mobility Driving Assessment Service's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

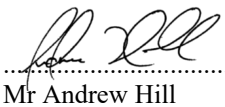
Independent examiner's statement

Since Wales Mobility Driving Assessment Service's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of FCCA ACA DChA BFP, which is one of the listed bodies.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of Wales Mobility Driving Assessment Service as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



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Mr Andrew Hill
FCCA ACA DChA BFP

Severn House
Hazell Drive
Newport
NP10 8FY

13 June 2023

Wales Mobility Driving Assessment Service

Statement of Financial Activities for the Year Ended 31 March 2023

	Note	Unrestricted funds £	Restricted funds £	Total 2023 £
Income and Endowments from:				
Donations and legacies		6,360	-	6,360
Charitable activities		149,661	437,966	587,627
Investment income	4	584	-	584
Total income		156,605	437,966	594,571
Expenditure on:				
Charitable activities		(155,645)	(437,966)	(593,611)
Total expenditure		(155,645)	(437,966)	(593,611)
Net income		960	-	960
Net movement in funds		960	-	960
Reconciliation of funds				
Total funds brought forward		199,825	-	199,825
Total funds carried forward	13	200,785	-	200,785

	Note	Unrestricted funds £	Restricted funds £	Total 2022 £
Income and Endowments from:				
Donations and legacies		7,643	-	7,643
Charitable activities		147,475	339,532	487,007
Investment income	4	55	-	55
Total income		155,173	339,532	494,705
Expenditure on:				
Charitable activities		(216,900)	(339,532)	(556,432)
Total expenditure		(216,900)	(339,532)	(556,432)
Net expenditure		(61,727)	-	(61,727)
Net movement in funds		(61,727)	-	(61,727)
Reconciliation of funds				
Total funds brought forward		261,552	-	261,552
Total funds carried forward	13	199,825	-	199,825

All of the charity's activities derive from continuing operations during the above two periods.

The funds breakdown for 2022 is shown in note 13.

Wales Mobility Driving Assessment Service

(Registration number: 1056588)
Balance Sheet as at 31 March 2023

	Note	2023 £	2022 £
Fixed assets			
Tangible assets	10	105,823	97,856
Current assets			
Debtors	11	14,685	15,713
Cash at bank and in hand		82,941	88,650
		97,626	104,363
Creditors: Amounts falling due within one year	12	(2,664)	(2,394)
Net current assets		94,962	101,969
Net assets		200,785	199,825
Funds of the charity:			
Unrestricted income funds			
Unrestricted funds		200,785	199,825
Total funds	13	200,785	199,825

The financial statements on pages 11 to 21 were approved by the trustees, and authorised for issue on 12 June 2023 and signed on their behalf by:

Dr M Stevenson
Chairman and trustee

.....
Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Notes to the Financial Statements for the Year Ended 31 March 2023

1 Accounting policies

Exemption from preparing a cash flow statement
The charity opted to early adopt Bulletin 1 published on 2 February 2016 and have therefore not included a cash flow statement in these financial statements.

Income and endowments

Donations and legacies

Donations are recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Gifts in kind

Donated goods and services are recognised in both income and expenditure at fair value at the date on which the benefit is received.

Investment income

Investment income is recogised on a receivable basis.

Charitable activities

Income from charitable activities includes income recognised as earned (as the related goods or senrices are provided) under contract or where entifiement to grant funding is subject to specific performance conditions. Grant income included in this category provides funding to support programme activities and is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Expenditure
All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category. Where costs cannot be directly attributed to particular headings they have been allocated on a basis consistent with the use of resources, with central staff costs allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use. Other support costs are allocated based on the spread of staff costs.

Charitable activities

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

Support costs
Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources, for example, allocating property costs by floor areas, or per capita, staff costs by the time spent and other costs by their usage.

Governance costs
These include the costs attributable to the charity's compliance with constitutional and statutory requirements, including audit, strategic management and trustees's meetings and reimbursed expenses.

Taxation
The charity is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the charity is potentially exempt from taxation in respect of income or capital gains received within categories covered by Chapter 3 Part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

Tangible fixed assets
Individual fixed assets costing £1,000.00 or more are initially recorded at cost.

Depreciation and amortisation
Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Asset class	Depreciation method and rate
Fixtures & fittings	20% on reducing balance
Motor vehicles	25% on reducing balance
Computer equipment	25% on reducing balance

Cash and cash equivalents
Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

Fund structure
Unrestricted income funds are general funds that are available for use at the trustees's discretion in furtherance of the objectives of the charity.

Restricted income funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Pensions and other post retirement obligations
The charity operates a defined contribution pension scheme which is a pension plan under which fixed contributions are paid into a pension fund and the charity has no legal or constructive obligation to pay further contributions even if the fund does not hold sufficient assets to pay all employees the benefits relating to employee service in the current and prior periods.

Contributions to defined contribution plans are recognised in the Statement of Financial Activities when they are due. If contribution payments exceed the contribution due for service, the excess is recognised as a prepayment.

2 Income from donations and legacies

	Unrestricted General £	Total 2023 £	Total 2022 £
Donations and legacies;			
Donated assets and services	4,620	4,620	6,500
Donations from individuals	1,740	1,740	1,143
	6,360	6,360	7,643

3 Income from charitable activities

	Unrestricted funds General £	Restricted funds £	Total 2023 £	Total 2022 £
Assessment and advice services	149,661	437,966	587,627	487,007

	Unrestricted funds General £	Restricted funds £	Total 2023 £	Total 2022 £
Assessment fees - Wales	115,489	-	115,489	102,638
Assessment fees - Chester	-	77,966	77,966	74,532
Welsh Government	-	360,000	360,000	265,000
Lessons	34,172	-	34,172	40,212
Covid-19 Support - CJRS	-	-	-	4,625
	149,661	437,966	587,627	487,007

4 Investment income

	Unrestricted funds General £	Total 2023 £	Total 2022 £
Interest receivable and similar income;			
Interest receivable on bank deposits	584	584	55

5 Expenditure on charitable activities

	Note	Unrestricted funds General £	Restricted funds £	Total 2023 £	Total 2022 £
Assessment and advice services		110,627	40,106	150,733	148,515
Staff costs		40,885	397,860	438,745	403,813
Governance costs		4,133	-	4,133	4,104
		155,645	437,966	593,611	556,432

6 Analysis of governance and support costs

Support costs allocated to charitable activities

	Basis of allocation	Staff costs £	Administration costs £	Premises costs including depreciation £	Total 2023 £
Assessment and advice services	A	109,688	3,942	9,105	122,735

	Basis of allocation	Staff costs £	Administration costs £	Premises costs including depreciation £	Total 2022 £
Assessment and advice services	A	95,000	9,223	4,000	108,223

Basis of allocation

Reference	Method of allocation
A	Caluclated at a rate of 25% support time incurred

7 Trustees remuneration and expenses

No trustees, nor any persons connected with them, have received any remuneration from the charity during the year.

No trustees have received any reimbursed expenses or any other benefits from the charity during the year.

8 Staff costs

The aggregate payroll costs were as follows:

	2023 £	2022 £
Staff costs during the year were:		
Wages and salaries	397,860	366,403
Social security costs	33,618	30,987
Pension costs	7,267	6,423
	438,745	403,813

The monthly average number of persons (including senior management / leadership team) employed by the charity during the year expressed as full time equivalents was as follows:

	2023 No	2022 No
Assessment services	13	12

No employee received emoluments of more than £60,000 during the year

9 Taxation

The charity is a registered charity and is therefore exempt from taxation.

10 Tangible fixed assets

	Furniture and equipment £	Motor vehicles £	Total £
Cost			
At 1 April 2022	231,187	185,928	417,115
Additions	-	28,810	28,810
Disposals	-	(19,000)	(19,000)
At 31 March 2023	231,187	195,738	426,925
Depreciation			
At 1 April 2022	205,956	113,303	319,259
Charge for the year	3,950	11,908	15,858
Eliminated on disposals	-	(14,015)	(14,015)
At 31 March 2023	209,906	111,196	321,102
Net book value			
At 31 March 2023	21,281	84,542	105,823
At 31 March 2022	25,231	72,625	97,856

11 Debtors

	2023 £	2022 £
Prepayments	14,685	15,713

12 Creditors: amounts falling due within one year

	2023 £	2022 £
Accruals	2,664	2,394

13 Funds

	Balance at 1 April 2022 £	Incoming resources £	Resources expended £	Balance at 31 March 2023 £
Unrestricted funds				
General				
General fund	199,825	156,605	(155,645)	200,785
Restricted funds				
Welsh Government: Section 64	-	360,000	(360,000)	-
Chester	-	77,966	(77,966)	-
Total restricted funds	-	437,966	(437,966)	-
Total funds	199,825	594,571	(593,611)	200,785

	Balance at 1 April 2021 £	Incoming resources £	Resources expended £	Balance at 31 March 2022 £
Unrestricted funds				
General				
General fund	261,552	155,173	(216,900)	199,825
Restricted				
Welsh Government: Section 64	-	265,000	(265,000)	-
Chester	-	74,532	(74,532)	-
Total restricted funds	-	339,532	(339,532)	-
Total funds	261,552	494,705	(556,432)	199,825

14 Analysis of net assets between funds

	Unrestricted funds General £	Total funds at 31 March 2023 £
Tangible fixed assets	105,823	105,823
Current assets	97,626	97,626
Current liabilities	(2,664)	(2,664)
Total net assets	200,785	200,785

Notes to the Financial Statements for the Year Ended 31 March 2023

	Unrestricted funds General £	Total funds at 31 March 2022 £
Tangible fixed assets	97,856	97,856
Current assets	104,363	104,363
Current liabilities	(2,394)	(2,394)
Total net assets	199,825	199,825

WALES MOBILITY DRIVING ASSESSMENT SERVICE

England & Wales - Charity number 1056588

Accounts

WALES MOBILITY & DRIVING ASSESSMENT SERVICE

SOUTH WALES

Rookwood Hospital

Fairwater Road, Llandaff

Cardiff CF5 2YN

Tel: 029 2055 5130

NORTH WALES

Disability Resource Centre

Ysbyty Glan Clywd,

Bodelwyddan, LL18 5UJ

Tel: 01745 584858

ANNUAL REPORT FOR THE FINANCIAL YEAR

2021 – 2022

e-mail: info@wddac.co.uk

www.wmdas.co.uk

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Director Report **Sandra Hutchings**
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VISION STATEMENT

The Wales Mobility & Driving Assessment Service exists to provide a high quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living throughout Wales by enabling them to resume or remain independently mobile

Wales Mobility and Driving Assessment Service
Report of the Trustees
For the year ended 31 March 2022

The Trustees present their report and financial statements of the charity for the year ended 31st March 2022

Structure, Governance and Management

The Wales Mobility & Driving Assessment Service (WMDAS) is located in South Wales at Rookwood Hospital, Llandaff, Cardiff and in North Wales at the Disability Resource Centre, Ysbyty Glan Clywd, Bodelwyddan, Denbighshire. Satellite services are operated in Mid Wales based at Montgomery Hospital, Newtown and West Wales in South Pembrokeshire Community Hospital. Many people from the borders of England and Wales have traditionally been referred to the North Wales service because of geographical proximity. The North Wales Manager, Gary Jones, supported by Driving Mobility and financed by the Department for Transport (DfT) in England, developed and established a new centre in Chester to undertake assessments for the ever-increasing number of referrals from this area. In Chester, the DfT pays an amount to meet the near actual cost for each assessment in keeping with their policy for all other English centres. DfT also fully funded the setting up costs and other WMDAS resource costs needed to establish the Chester service

The WMDAS is a registered Charity No. 1056588 set up under a trust deed. The service is funded by a Welsh Government Grant under section 64 of the Health Services and Public Health Act 1968. However, as from April 2016, the format of the grant was changed from ongoing 'core' funding to 3 year 'project' funding that requires a fresh re-submission every three years as well as detailed interim reports on a half yearly basis. This funding is allocated on a yearly basis subject to the terms and conditions set by the Welsh Government (WG), one of which is attaining the targets that have been set year on year. Re-application for the grant is in competition with other charities in Wales. This format of funding makes the future of the charity less secure and will require alternative streams of funding, at best to supplement, and at worst to replace, this source of funding. The grant is for *all* Wales and the Director who is based at the South Wales Centre manages the budget for both Centres.

The South Wales Centre operates under a Service Level Agreement with Rookwood Hospital where accommodation and utilities are provided free of charge in exchange for the services of centre staff in helping with the assessment and rehabilitation of inpatients and providing teaching to staff. The entire in-patient hospital has now relocated to Llandough Hospital during 2021/22 and new premises for the WMDAS are in the process of being refurbished on the NHS retained part of the Rookwood site though in a different building. The North Wales centre, located in The Disability Resource Centre, pays an annual rent which includes their utilities. Both centres pay their own Telecom and other costs. Both the DVLA and Motability pay the cost for any referrals they make to either centre. In all other cases, clients are self-referring and pay a set fee towards the cost of the assessment.

The service offers both driver and passenger assessments to provide the client with a long-term mobility solution. The driving assessment is not a driving test. The aim of

the assessment is to evaluate the current physical and cognitive ability of the individual to drive a motor vehicle in safety and comfort at the time of the assessment. Clients are sometimes assessed on a static assessment rig (SAR) for their reaction times, steering strengths and to determine what adaptations (if any) are required. Clients are then assessed in a vehicle with adaptations where necessary in off-road and on-road situations. A report and relevant leaflets and information are sent to the client within 10 days of the assessment.

Passenger assessments are undertaken for clients who experience difficulties with access to and from a vehicle. The centres have a wide range of equipment that may reduce or eliminate the physical effort involved during transfers.

The centres also provide a free information and advice service and can advise on a range of issues including DVLA, legislation, Motability schemes, driver tuition, vehicle adaptation firms, insurance companies, and much more. A WMDAS website provides access to booking and paying for assessments online.

Objectives

To provide a high-quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living throughout Wales by enabling them to resume or remain independently mobile.

Trustees and organisational structure

The Wales Mobility & Driving Assessment Service has an Executive Committee of 9 members who meet quarterly or sooner if needed and are responsible for the strategic direction and policy of the charity. The Committee is comprised of members from a variety of backgrounds relevant to the work of the charity.

Communication between Centres. The geographical challenges of North and South Wales make road connections long and difficult and this had resulted in a degree of isolation of the centres. However in past years, we have managed to strengthen the links by several means. As it is now easy and cheap to travel by plane between Cardiff and Anglesey for a day visit, staff have been able to meet up and share practice on the ground, including shadowing. Due to lockdown, Virtual Zoom and Teams have become the usual way to keep in touch and to hold Trustee, Staff and Management meetings. This method has proved very beneficial and will form part of the future. Trustees, who are mostly based in South Wales, have also been able to visit North Wales and we now have three Trustees from North Wales, who have attended meetings via Zoom. Furthermore, the Minutes of the Trustees' meetings are circulated to the North Wales Advisory committee, the North Wales Manager and North Wales and South Wales staff. Centre Managers are present at Trustee meetings.

Funding the Service. For over 30 continuous years until the end of 2018/2019, the WMDAS main source of funding for its activities in Wales was via a (recurrent) 3-year Welsh Government grant scheme. When the focus of this 3-year grant scheme was then changed from core funding to project funding, the WMDAS was unsuccessful in its funding bid. However, the Welsh Government did decide to maintain a grant to WMDAS on an annual basis at £265k from 2019/20.

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a three-year funding award to WMDAS with an increased funding allocation of £360k for each of the years 2022/23, 2023/2024, 2024/25. This much welcomed and needed 3-year grant award together with the uplift in grant funding now provide WMDAS with greater stability as we move forward in developing and delivering our service provision in Wales.

The Welsh Government's grant is administered through the South Wales Centre and the Director has the overall responsibility for managing the utilisation of these grant resources throughout the WMDAS and liaising with the Welsh Government on all grant matters. In undertaking this task, the Director also ensures (on an ongoing basis) that the Trustees are kept fully and properly informed of the WMDAS' financial position.

Links with Driving Mobility. Both centres are affiliated to and accredited by Driving Mobility (DM) and work in compliance with DM Governing Documents, as well as the grant requirements stipulated by the Welsh Government and the Charity Commission. The interlinks between the two centres and Driving Mobility (DM) have also become stronger. DM is the umbrella organisation for DfT to manage policy making for the UK centres and has also been proactive in making assessment results across the centres transparent and are continually working with centres towards better standardisation and comparable outcomes.

Increased complexity of rules and regulations: There has been increased demands for complex databases and explicit written policies and procedures for evolving aspects of the law from various departments of WG, the bank and the Charity Commission as well as the existing ones for audit from DM and Dft. These cover Privacy Policies and cyber security This continues to put further time demands on the managers and the Director.

Risk Management

The Board of Trustees has conducted a review of the major risks to which the charity is exposed and where appropriate, systems and procedures have been established to mitigate the risks the charity faces.

(1). Age of Trustees: Many of the Trustees were long serving and there was a lack of new potential Trustees seeking election over a number of years. We are now fortunate to have elected new Trustees who have different backgrounds and skills to inform our consideration. A further two Trustees have been co-opted on the Executive Committee in 2022 who bring additional skills and expertise to the existing Board.

(2). Age of South Wales staff: The mean age of the staff in the Driving Assessment Centre in South Wales was at or above retirement age and has been ameliorated. Two staff members retired and following the employment of new staff across the service the staffing is now more representative of the working age population.

Achievements and Performance

1. *Main Service Provision and Activity.*
   Coronavirus resulted in the centres' closure for 6 weeks at the beginning 2021/22. Nevertheless, all targets were met

STATISTICS:
The overall numbers of clients assessed between 1 April 2021 and March 31 2022

No of Assessments	South/West Wales	North/Mid Wales	Chester	Total
2017/18	565	310	108	983
2018/19	583	232	152	967
2019/20	615	290	159	1064
2020/21	237	91	44	371
2021/22	**570**	**289**	**182**	**1041**

Of the 1041 assessments in 2021/22: **76** were review driving assessments and 45 passenger assessments.
Referral sources in 2021/22: Self / family: 432 DVLA:235 Motability MoMap: 140 NHS/Health Professionals: 39 Social Services:20.

Customer Satisfaction Survey This year's Survey again shows WMDAS is fulfilling the expectations and needs of clients (with 98% of respondents marking satisfied and very satisfied with the service)
To ensure a representative view of service users, irrespective of the outcome of their assessment, a Customer Satisfaction Survey was sent to all clients who had attended between April 2020 to March 2021. However, in cases that had potential to cause distress to the client or client families, a decision was made to withdraw these individuals from circulation of this survey. This refers to clients who have attended for assessment and who have no insight into their deficits caused by cognitive decline. It also refers to clients who have attended but have passed away. Clients who returned for review are not routinely sent a CSS as some attend at 6 monthly intervals. NW includes outcomes for Mid and North Wales, South Wales includes West Wales outcome.
The full set of data gathered during 2021/22 can be viewed on request. A summary of the data is contained in the Director of Services report.

(b) Chester Driveability
Gary Jones has successfully set up a thriving new driving assessment centre in Chester which has gone from strength to strength to meet an expanding demand from this part of England that hitherto has been directed to the North Wales centre. During 2021, Gary prepared a Chester Driveability Business Plan for the 3 years 2022/23 to

2024/25 which set out how the service provided at Chester could be further developed and expanded to meet client demand. This Plan was agreed by WMDAS, Driving Mobility and the Department for Transport and its implementation is now proceeding.

(c) *Adapted – Vehicle Driver Training Service*

The driver training service has been expanded to service clients with mobility problems. **118** clients received this service with **771** hours of driver training in a range of adapted vehicles during 2021/22. This service has proved extremely popular and has provided a lifeline to those with disabilities as prior to WMDAS developing this service, there were almost no driving schools with the expertise or adapted cars to accommodate those who are unable or unsafe to drive in the conventional manner. This useful service is also a revenue raising activity for WMDAS.

(d) *Older Driver Development Programme*

The service developed with Denbighshire County Council and neighbouring counties was suspended in 2021/22 because of Covid and Government restrictions

(e) Older Driver Fitness to Drive pilot scheme.

This initiative is a joint WMDAS / Dyfed Police project that aims to assess fitness to drive in older drivers who have been reported for committing a road traffic offence. In 2021/22 The Older Driver Fitness to Drive scheme was suspended because of Coronavirus during 2020/21 and remained suspended for some months in to the 2021/22 period. Referrals were received in the later part of 2021 from Dyfed Powys Police. Following a recommendation from the Coroner at Swansea Crown Court, South Wales Police have expressed a wish to use our service followed by enquiries from Gwent Police. Negotiations have been on going and once the Business case has been improved WMDAS will begin accepting referrals from South Wales and Gwent Police Forces in the summer of 2022.

(e) Welsh Rugby Union Charitable Fund. Links have been made between the South Wales Centre and the WRU Charitable Fund who now refer their clients to the centre for specialist help with mobility and driving needs.

2. *Awareness Training and Teaching:*

There were no face to face training or teaching courses undertaken during 2021/22 due to Coronavirus restrictions but virtual presentations were given to several organisations including Flintshire Physiotherapy Team, Powys Older Age Psychiatry, and the Stroke Association.

(a) *Open Days* - Not organised due to Government Restrictions

(b) *Clinical staff training*.

In South Wales, clinical staff and medical advisors from the DVLA have had one-to-one observation sessions. In North Wales staff gave virtual presentations to neuromuscular centres and clinical staff at various hospitals and centres.

(c) *Awareness training for other individuals and organisations.* These take the form of presentations and demonstrations and are given to Memory and Stroke services; support workers; OTs working in the community and Accredited Driving Instructors but again due to Covid restrictions these visits were cancelled in 2021/22

(d) *Contribution to formal education courses in assessing driving mobility*.
Gary Jones, North Wales Manager, continues to be significantly involved in the DM Education Modules.
Gary Jones has also been instrumental in the setting up of a new educational course at Oxford Brookes University which has replaced studying at Chester University and continued his role as an Associate Tutor for Driving Mobility.
Alison Kay, Lead Driving Adviser/OT retained her position on the Driving Mobility education working group.

Continuing Professional Development

Two members of staff (North & South Wales) began studies through the Driving Mobility Academic Programme with Oxford Brookes University towards the award of *Certificate of Higher Education – Driving Assessment and Outdoor Mobility,* and a further member of staff (South Wales) began studies through Driving Mobility Academic Programme with Oxford Brookes University towards the award of *Post Graduate certificate – Driving Assessment and Outdoor Mobility.* To date each student has completed 2 of their 3 mandatory modules of study. Staff have also taken part in virtual courses on safeguarding, first aid, disability awareness and complaint handling.

Vehicle and Office Equipment Renewal.
Following the South Wales reaccreditation in 2021, office and assessment equipment and vehicles have been updated and maintained in accordance with criteria set by Driving Mobility to maintain accreditation status. The centres in Newtown and Pembroke Dock gained accreditation in 2019. North Wales will be receiving an accreditation visit in 2022.
Although most of the staff have returned to working in the centres some remain working from home and continue to use IT solutions which were installed to allow for improved internet and telephone communication.
PPE and infection control systems installed in accordance with Driving Mobility Standard Operational Policies are still in operation.

Financial Review

The principal funding source of the Charity in 2020-21 remained the Welsh Government under their 'project' grant funding arrangements. Within the conditions of the grant, for the 3 years 2016-17 to 2018-19 our overall grant was reduced by 5% each year and our 2019-20, 2020-21 and 2021-22 grant funding was maintained at the 2018-19 level of £265,000 per annum which represents further real term cuts. By comparison, centres in England financed by the DfT, have received an annual increase in funding over the same period. Salaries and earnings-related costs

including the Government Pension Scheme introduced in January 2017 continue to represent the largest element of expenditure, details of which can be found in the Statement of Financial Activities. The pressures on our financial stability and future sustainability as a consequence of the Welsh Government's grant funding regime arrangements have increased year by year and have acted as a constraint on meeting client demand for our services. The free assessment through the NHS referral pathway remains closed and all clients continue to pay for their assessments apart from those who are in-patients and are assessed and as part of their care package. Clients are given the option of referral through Motability or DVLA if they feel unable to afford the cost of the assessment.
The level of the Charity's assessment fee has been kept under critical review and was unchanged at £120 from April 2020. At this fee level, clients only meet a proportion of the real cost of an assessment which in 2018-19 was estimated to be well over £500. There will be ongoing pressures on both expenditure and income over future years as the demand for services continues to grow. The Director and Trustees will continue to monitor our income and expenditure across the range of our organisation's activities. Proposals for any new activity will need to be considered against our other service delivery priorities and also demonstrate that they are cost effective and affordable.

Covid and the Welsh Government responses have again impacted on our operational activity in 2021-22. Financially, we have faced a reduction in income with assessment numbers and the associated fees they generate down and the additional costs incurred in meeting the Welsh Government requirements to ensure that our Centres are Covid safe for both staff and clients. For 2022-23 and beyond it is impossible to predict with any certainty what impacts Covid and the Welsh and UK Governments responses may have on our organisation. We can only respond in a considered and flexible way as issues emerge.

All the 2020-21 Welsh Government funding was used as agreed and budgeted as detailed in the Business Plan with some adjustments to meet unplanned for Covid costs.

The opening balance in the current account on April 1st, 2021 was £20,555 and the closing balance on March 31st 2022 was £7,552.

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a 3-year grant award to WMDAS with an increased funding level of £360,000 for each of the years 2022-23 to 2024-25. WMDAS are delighted with this news and these additional resources will generally be applied to employ additional staff; to mitigate inflation pressures and meet increased levels of employer NIC contributions. The impact these additional grant resources will have in meeting the demands for WMDAS services will be monitored by WMDAS management and Trustees.

Reserves policy

It is the general policy of the charity to work towards accumulating unrestricted funds not committed or invested in tangible fixed assets representing between three and six months of expenditure. At this level the Trustees consider that sufficient unrestricted reserves would be in place to cope with planned or emergency replacement of capital equipment, and the activities of the charity could continue in the event of a sudden drop in funding and/or increase in expenditure. At the end of March 2022, the Charity's unrestricted reserves stood at some £80,841 This represents a decrease of £45,000 in our unrestricted reserves since 1 April 2021. Sustaining our unrestricted reserves at over £100,000 will remain extremely difficult in future years given the increasing demand pressures for our services and the need to balance our income/expenditure position to ensure the ongoing and future viability of the Charity. The Trustees will continue to monitor our unrestricted reserves position.

Plans for future periods

Welsh Government funding has been allocated for three years which has allowed the option to employ additional staff to process the additional assessments generated by referrals from South Wales and Gwent Police forces. Additional staff will allow the waiting list of currently 10 weeks to be decreased in South Wales. The space for additional staff has been made possible because the South Wales centre will be relocating in the summer of 2022 to refurbished premises on the existing Rookwood site which provides space in which three assessment teams can work in one day.
The new premises will provide electric points for the use of electric vehicles which the Cardiff centre hopes to obtain during 2022/23.
In North Wales, the present premises are not able to offer electrical outlets for electric vehicles and the car parking situation presents accessing difficulties for visitors and clients. During 2022/23 alternative premises will be explored and costed.

Driver Training for those who have been assessed and need practise of driving in a new way using adaptations has been developed and proved extremely popular. There are few driving schools who have vehicles with adaptations therefore the centres use their vehicles and their experienced driving instructors to provide this essential service. This provides a small additional revenue for WMDAS.

Statement of Trustee's responsibilities in relation to financial statements

The law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial year which show a true and fair view of affairs of the charity's financial activities during that year and of its financial position at the year end. In preparing those financial statements the trustees should follow best practice and:

- Select suitable accounting policies and then apply them consistently:
- Make judgements and estimates that are reasonable and prudent:

- State whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in fina; and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operational existence.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and which enable them to ensure that the financial statements comply with the Charities Act 1993, the Charity (Accounts and Reports) Regulations and the provisions of the trust deed. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Trustees on 10th May 2022 and signed on its behalf by.

John Carter

John Carter – Treasurer of the Board of Trustees

Dr Mary Stevenson

Dr Mary Stevenson – Chairperson of the Board of Trustees

Dated: 10th May 2022

DIRECTOR OF SERVICES ANNUAL REPORT

2021-2022

SANDRA HUTCHINGS

For WMDAS the financial year began in May as due to Covid restrictions the centres were unable to begin operations up until then. There were extremely large waiting lists to manage and staff worked hard to contact everyone on the lists and arrange assessment dates.

Issues arose and are still in place due to people being reluctant to travel and attend after being in isolation for such a long time. There was a limit on the number of staff that could be in centre at one time and some staff had to remain working from home.

This year has seen a large increase in cancellations especially at the North Wales centre where also they have experienced a drop in referrals.

The decrease in referrals and assessment numbers has been experienced throughout the UK at many centres with clients cancelling at the last minute because of Covid and doesn't allow time for the slots to be filled. There were also staff shortages during the year attributed to staff on sick leave after contracting Covid themselves. The 10 day isolation rule meant juggling staff and days to ensure the continued smooth running of the centres.

Although the isolation rules have been relaxed staff are to be thanked for their cooperation and willingness to cover staff absences at this difficult time as Covid continues to affect them and their families not only throughout last year but on an ongoing basis.

The South Wales centre however have struggled to keep up with demand and have a 10 week waiting list at present. Staff face the same challenges with Covid related sick leave and cancellations but have an extensive waiting list to call on to fill slots.

Referrals from DVLA have noticeably decreased because of issues within the DVLA themselves. They have a huge backload of applications to work through and face the same staff problems with Covid as everyone else. This coupled with industrial action has caused further delays in dealing with licences and resulted in frustration with our clients who call on us to act on their behalf.

One area of the service we provide has taken off at speed (excuse the pun) during the year. The Driver Training scheme was introduced because of the lack of adapted driving school vehicles available for our clients and there is now a waiting list for this service. Driving Instructors employed as driving assessors at our centres arrange lessons out of work hours using the centre vehicles to provide this essential service.

This is beneficial as it keeps the vehicles in use, we have found in the past that vehicles left sitting in the car park results in flat batteries, flat tyres and mouldy window seals! And of course added bonus, we make a small profit from the fees charged for the lessons.

Referrals from Dyfed Powys Police resumed at the end of 2021 and South Wales and Gwent Police Forces are eager to begin using WMDAS services. Business cases and SLA's are nearing completion to allow the referrals to be received in the coming months.

During the year Gary Jones the manager of the North Wales centre has successfully transitioned the Driving Mobility Diploma course from Chester University to Oxford Brookes. The move has been welcomed by centre staff and we have three staff members at present undertaking modules to complete the course. Alison Kay, Clinical Lead OT at the North Wales centre remains a mentor for

students on the course. Chris Jones, North Wales Lead ADI/ Driving Advisor is an active member of the Driving Mobility Board and has been involved with developing new procedures to be introduced during accreditation visits to centres in 2022/23.

Virtual meetings have been held for Centre Managers, Staff and Trustee meetings and we have been very lucky to welcome two new co-opted Trustees to our Executive Committee. Andrea Duckworth and Dafydd Hughes have joined us and bring a wealth of experience to the Board.

Around November it was once again the time of the year to begin worrying about the financial future of WMDAS. For the past three years we have had no direct contact with Welsh Government regarding future funding and therefore not allowed the opportunity to present the dire situation we face because of lack of funding. There are so many avenues we need to develop into to keep abreast with the English centres who have the luxury of adequate funding to allow them to develop.

For the past two years we have been grant funded on a one - year basis at the same rate without any consultation and over the past year have relied on the reserve bank account on several occasions to see us through. Following a chance conversation and advice to submit a business case to the social services section of Welsh Government we were jubilant in December 2021 to receive the news that we had been successful in securing additional grant funding for each of the following three years 2022/23,2023/24,2024/25. Double celebration, an early Christmas present and great news for everyone involved in WMDAS.

With this news came the usual paperwork and Work Plan to submit which John Carter our Treasurer and I worked on throughout the Christmas period. Helen Mundell and Gary Jones, Centre Managers were consulted on development plans and it soon became clear that the additional funding was not going to stretch as far as we had hoped.

Nevertheless, it has allowed us to plan to employ additional staff to develop our services and we are excited to look forward and put these plans into operation during 2022/23.

Another exciting development is the move of the Cardiff centre to refurbished premises on the Rookwood site. They should be completed and ready for business by mid - May. The additional space in the refurbished build will accommodate the additional staff and afford staff improved working conditions.

Following the suspension of the Mid Wales service due to the Pandemic initially and then the lack of OT involvement, we are happy to announce that a limited service is now operating. A SLA is in the pipeline and an OT identified and seconded to take over the vacant post. In the mean time Gary Jones continues to travel from North Wales to assess at Newtown, taking an OT from North Wales with him for those assessments that require OT involvement, for example DVLA referrals.

The Trustees have agreed to support the Future 3 year Business Plan for Chester Driveability. Gary and the North Wales team developed CDA following discussions with Driving Mobility who "own" the centre and who sub let its operation to WMDAS.

CDA has outgrown its space and Gary has been exploring different venues in which to relocate. During 2022/23 CDA will operate an additional day a week with staff from the North Wales centre initially working the additional day. The plan is to recruit an OT and ADI to train them to assess independently during 2022/23

WMDAS Trustees and Management are grateful for the additional funding CDA contributes to WMDAS and thank Edward Trewhella CEO of Driving Mobility for his continued support.

As we approach the financial year 2022/23 we appear to be returning to some kind of normal life, although a long way off pre Covid the future looks promising. Apart from the threat posed from the Russian invasion of Ukraine resulting in fuel increases, which will considerably effect our

expenditure, the Wales Mobility & Driving Assessment Service can finally look forward to secure funding for the coming three years and allow us to develop our services.

Thank you to the Trustees and to the staff without whom WMDAS would not be the resounding success it is. Thanks also to the manufacturers who have supported us, our landlords the University Hospital of Wales Health Board, The Disability Resource Centre, Bodelwyddan and Chester Cricket Club, Chester and to many individuals who have supported our IT/Telecom systems and kept us online during the past two years.

Best Wishes,

Sandra Hutchings

SUMMARY OF THE WALES MOBILITY AND DRIVING ASSESSMENT SERVICE CUSTOMER SATISFACTION RESULTS FOR 2021/2022

This summary presents the outcome of the 2021/2022 Customer Satisfaction Survey for Wales and offers analysis of the responses gained from the returned surveys.

The information gathered from the 2021/2022 Customer Satisfaction Survey will be used to inform service development within Wales to ensure service provision remains, effective, efficient and of the highest quality.

A total of 758 surveys were distributed for the year 2021/2022

Of the 758 surveys sent out during 2021/22, 423 were returned, a 56% response rate. The percentages in this summary are an average of three reports from South and West Wales, North and Mid Wales and Chester Driveability. Dyfed Powys Police Fit to Drive referrals were postponed until November 2021 due to Covid 19 therefore only 14 Fit to Drive Assessments were completed in 2021/2022.

The number of respondents who replied:

North & Mid Wales:	96 replies a response rate of 41%
South & West Wales:	253 replies a response rate of 70%
Chester Driveability	73 replies a response rate of 46%

There was an increase in the response rate from 2020/21 and once again the responses were mainly from males, 71% men and 29% female. The most popular age group who replied were in the 70 years or older age group. 98%of users felt that their initial enquiry was dealt with promptly and 92% of users were either satisfied or very satisfied with the time taken to arrange an appointment. 93% of SW referrals were satisfied or very satisfied with parking facilities and 81%of NW referrals were satisfied or very satisfied.

98% of respondents felt that the driving assessors gave a comprehensive explanation of what the assessment would involve and 98% of respondents were satisfied or very satisfied with the manner in which the assessment was conducted. 93% expressed that their anxieties had been addressed.

92% of respondents were very satisfied or satisfied with the cognitive screening tests applied prior to the on-road assessment with 98% satisfied or very satisfied with the content of the on-road assessment.

80% of respondents were happy with the adaptations demonstrated but it was noted that at the Cardiff centre 50% of the respondents did not answer this question, because they did not require an assessment for adaptations.

There is a range of most commonly seen vehicle adaptations available at all centres. The vehicle fleet and associated adaptations is constantly under review to ensure a comprehensive range of equipment is available. A large fleet of assessment vehicles are

available to meet service users needs during assessment and every effort is made to ensure assessment reports contain comprehensive detail of the vehicle controls and vehicle features required for safe and independent mobility.

Of all respondents 95% were very satisfied or satisfied with the length of the assessment and overall 98% were satisfied or very satisfied with the content of the assessment.

The majority of respondents self referred for driving assessment with 96% indicating they were either very satisfied or satisfied with the overall levels of service received by WMDAS. There are of course always the odd negative comment received from clients who have been delivered an unfavourable result.

The satisfaction rates are generally rewarding to see and compare with the satisfaction rates measured for 2018/19,2019/20 and 2020/2021 indicating a constantly high level of customer satisfaction over a 3 year period despite the pandemic.

As in previous Customer Satisfaction Surveys it is always encouraging to see such positive feedback from service users, it is also important to acknowledge the few negative comments to ensure consideration is given to further improve the service.

Concluding Remarks

From the responses received for the 2021/22 Customer Satisfaction Survey, it is evident that WMDAS continue to successfully meet the needs and expectations of our service users despite limited resources and significantly increased demands upon all personnel.

Although we will continue to monitor and develop our administrative and assessment process, as well as promoting and supporting the professional development of all personnel, it is apparent that we continue to deliver services that are effective for, and valued by, the vast majority of our service users.

Thank you to Gary Jones together with Louise Barr and Helen Mundell and Julie Jordan for collating and preparing the 2021/22 Customer Satisfaction Surveys.

A full set of CSS results has been sent to the Executive Committee and North Wales Advisory Committee and is available to anyone who wishes copies by contacting the Director of Services.

The following are a selection of comments received from our service users;

1. The assessors were very professional, they took time to explain things clearly and sensitively (2).
2. I am very pleased; they explained to me everything (4).
3. We had a great deal of help from Julie (I think this is her name) in the Mobility Centre- this meant a great deal to us (5).
4. I was happy with the service (12).
5. Put at ease with the instructor and lady (Jude?). Well done (15)
6. Everything was very satisfactory. (34)
7. Very pleased (37)

8. Very happy with how the assessment was run. (36)
9. Assessment centre staff were excellent and very professional (61)
10. As far as I'm concerned all ok (62)
11. It was nice to drive again, as its almost been three years, plus I'd never driven on the roads. (63)
12. Because of my lack of memory, unfortunately I can't remember all the answers, I hope this will be acceptable to you. Anyway, I shall not be bothering you again. Thank you for your patience (64)
13. The facilities were well organised and the test was well planned and extremely useful. (65)
14. I was more than satisfied with every part of the assessment. I felt very at ease with the lovely staff. (66)
15. A clear assessment of my driving was given and highlighted mistakes that I had made – which I accepted. Too much emphasis on issues which I do not consider so important but I agree with the assessment to cease driving. I have surrendered my right to drive and sent my licence to DVLA. (67)
16. I think your organisation provided an excellent service particularly in view of the Covid constraints. Your staff were friendly and helpful, I have been worried, they were authoritative and rather daunting. I love the idea of being asked to assess the assessment. Thank you for assessing me without scaring me silly. (Barry Saunders (68)
17. Redecorate of assessment reception and classroom. Yours Sincerely D A Catley (69)
18. Dean is very professional and my confidence improved as we continued. Thanks to Dean (70)
19. When I arrived a gentleman approached the car asked if we were having an assessment and said follow me. He walked in and I followed a bit behind him and the gentleman who to me for assessment approached me and said don't come in go outside, I was nervous and could have been handled better as he then said to come in. (Helen Bevan) (71)
20. Very satisfied with the service assessment and treated well by the HGV instructor Yours Sincerely, Michael Alvis (72)
21. Thank you! (73)
22. I was very satisfied with both assessor that was with me on my assessment. They explained all the controls on the vehicle before we started to move onto the roads in the hospital grounds were a bit narrow and pot holes, John Davies (80)
23. Was very nervous on arrival, driving in-front of strangers but was made to feel at ease straight away. Jeff and Helen were really easy to talk to and would recommend you to anyone. Many Thanks, Jeff Secker (81)
24. Staff were very friendly and took the time to explain things to me. (82)
25. The two assessors were exemplary (83)
26. We found the whole experience was so friendly and professional, that I felt very much at ease. Although the first time behind the wheel in 6 years was intense, the assessor was patient and encouraging. Thank you very much (97)
27. No information given in rehab or occupational therapy/ I only found out you existed through Dave Broadhurst whose mobile number I was given by the garage in Llanelli who did a left foot accelerator adaption to the car which I later found unsuitable much to my cost (98)
28. As it happened due to various issues at the DVLA my licence was still in force – though I had not driven for 9 months "following practitioner advice". The assessment was a real

boost to my self-esteem – only to find that a few days after my assessment DVLA revoked my licence. Had my licence already been revoked I would not have been able to have the assessment and hopefully use the evidence in support of my licence re-issue. There is a possible chance "catch 22"" situation here that it may need to be considered. R C Slade (99)
29. I found people at the centre very kind and caring (100)
30. When I first came to the assessment centre I was greeted by lovely people, who are amazing at their roles which each person plays. I was absolutely scared stiff. But I was calmed down and explained what would happen. Learning to drive with hand controls was hard for me, but with the extra lessons off a lovely instructor I conquered my fear and passed my assessment. What an amazing team (108)
31. I was made to feel very comfortable when I arrived. (109)
32. Satisfied (110)
33. Avril Day (on behalf of Allen). Allen was disappointed on day due to extreme weather conditions and was upset as a result. He now accepts that although masks, weather and poor hearing played a part, his driving must stop as he does not wish to put himself and others at risk. Thank you for being understanding. (111)
34. Thank you to all the team who made me feel at ease when coming to the assessment. It was a nerve wrecking experience and I felt supported from arriving to leaving. (112)
35. Go paperless – save trees! (113)
36. For the purpose of the assessment the examinee is required to use the assessment service's car. This will probably be different make and model from his/her own car. Whilst almost all cars now conform to a very similar general layout of controls, their fine positioning and particular, their responsiveness to application of the brake, accelerator or clutch may be quite different from that of a more familiar vehicle, ie the examinee's own car. The examinee may then find himself/herself on a circuit of wholly familiar public roads, having had very little chance to become accustomed to the characterizes of the test car and its behaviour. Can it not be an option for the examinee to have the choice of being assessed in his/her own vehicle? It is likely that the examinee will have driven his/her own car for a number of years and is therefore thoroughly sure of the positioning of its controls and the response to their application in all sorts of road conditions. The examinee would of course be required to show all the appropriate insurance, MOT test papers, etc. Or as part of the assessment, could there be access to a test track, where the examinee could have some time to become accustomed to the characterists of the test car – its response to the accelerator and brakes, etc, before being taken out onto the public highway. (114)
37. From start to finish, very good, everybody was good in every aspect. (116)
38. Really pleased with the test and outcome (117)
39. More parking spaces required (118)
40. More briefing prior to test would have been good. (134)
41. Very Happy with the assessment team in completed the course. (135)
42. The instructor assigned to me was Jeff. As he was able to think outside the box, he devised a way to enable me to drive without the need for hand controls. I am delighted with the outcome and very grateful to Jeff for being such a special human being. Tricia Gore (137)
43. Very Professional, caring, efficient, couldn't have asked for anything more. Thank you, Mrs Bevan (138)

44. I was very pleased with the kindness and understanding shown by the staff, Geoff and Marina in particular. (139)
45. The evaluation team were both professional and courteous. The experience was educational and somewhat enjoyable. (140)
46. Excellent service providing piece of mind (141)
47. Happy with all of it (142)
48. Very good. (143)
49. Just when I got in the car surprised it was an electric handbrake as I have never used one so a bit strange (144)
50. It couldn't have been better (145)
51. The test was done in Cardiff and I have not been to Cardiff for over 3 years. This is not an excuse as I think the right decision was made and I accept it. Malcolm Grist (147)
52. No Room for improvement, cool and calm assessors, every question to a point. Amazing team (161)
53. Very unfair assessment. As this is my only way of getting around. I am prepared to have another assessment and pay for using my own car that I am used to. (162)
54. I found the staff very helpful. They were friendly and explained any questions I asked. Thanks G Jones. (163)
55. I was very impressed by the kindness and consideration given to me, inspiring me with confidence to proceed with the assessments (Mrs Margaret Webb) (164)
56. I would have appreciated more time to complete the cognitive testing by the OT, I felt this was a bit rushed. I was satisfied with the assessment itself. (165)
57. I would like to thank Mr Jeff Botwood and Mrs Rita Kemble for their calm and informative instructions enabling me to feel at ease straight away and able to undergo the driving assessment. (166)
58. As above – overall I was satisfied with the service – but I left feeling down heartened. A little more time on a balanced feedback would have been helpful – But overall I understood and was satisfied. (167)
59. Excellent service, detailed advice and instructions, friendly staff, everything well explained, great and thanks! (168)
60. People were courteous and polite, instructions were clear and direct, fully understandable. (169)
61. Jeff and Rita could not have done anymore to make me feel as relaxed as possible on the morning of the assessment inn order for me to perform to the best of my ability. Julie (sitting next to Jeff) also contributed to the warm and engaging atmosphere. My husband appreciated the friendliness and thoughtfulness shown to him. While I was being assessed he spent the time drinking your coffee and reading a book. You provide a friendly and professional service. Even if the outcome had not been positive, I feel that you could not have done more for me. (170)
62. I found the assessor and assistant most courteous and polite. They made the assessment enjoyable, an experience that could have been awful, Mr Leonard Baldwin (171)
63. Staff were friendly and informative. Thank you (172)
64. Rita and Jeff are a great team! As I'm sure most people are, I was quite nervous attending the centre. Both put me at ease immediately, explaining what would happen very clearly. I felt much more at ease as a resort. Long may your much needed work continue! Thanks. (173)

65. I was a bit disappointed with my report. After the assessment I was told by the assessor that I had done 'very well' throughout the assessment yet my assessment was marked as average throughout?? I have to say the assessor was extremely helpful throughout though and a very nice guy. (175)
66. Need more information of what will be expected of you at the centre (176)
67. More parking facilities on site would be more beneficial. A written report is essential in my opinion, please could a copy of the report be sent to me, Gareth Middleton. Happy that this feedback is not anonymous (177)
68. Re: Time waiting for the appointment. I received the letter from the DVLA saying about my assessment in Jan 2021 and I waited until Nov 2021 to have the assessment. Although I found this wait frustrating, I understand the reasons behind it and wouldn't dream of marking it as dissatisfied. (181)
69. No, as far as my dealings with your organisation there is no need to improve your service. All completed to a high standard. (182)
70. After driving mainly on country roads for most of my driving time I found the traffic and parked cars on mainly 20-30 miles limited roads difficult and the testing process disconcerting – this is no reflection on the tester. H Hartmann (183)
71. The address for the service was not clear. I found it prior to the service but following a telephone call we found it in the hospital and not where expected it to be. M Evans. (184)
72. Staff were very good, reassuring. At the end of the assessment, families concerns regarding my ability to drive were alleviate so now they fully support my wishes to drive. (189)
73. Excellent service, polite welcoming staff. I was made to feel at ease and felt the staff wanted to do everything to keep me on the road safely. (190)
74. Excellent service, all staff are friendly and helpful and very efficient. Also always have refreshments. Instructors are great, I'm learning a lot driving about Cardiff advising me and directing me. Really, really appreciate all they do. Looking forward to some more lessons. (191)
75. A big thank you is sent to everyone at the assessment centre. Everyone was professional and aware of both my physical and mental needs. The assessment gave me the reassurance that I am ready and safe to resume my driving again. I am currently looking for a new car and hope to start driving again in the new year. Many thanks to everyone at the centre. (192)
76. The assessment process was excellent. The assessors were friendly and professional and were obviously skilled in their areas of expertise. A stress inducing assessment was made relaxing and enjoyable. An excellent service. (193)
77. Please give my thanks to Jeff and Rita for making my visit much less stressful than expected. (194)
78. Both driving assessors and OT made me feel at ease and were both very helpful. (195)
79. I felt that I was treated in a very professional, reassuring and friendly manner, but I think it would be helpful if people were aware of this service, as none of the health professionals when I consulted about my ability to resume driving mentioned it. That included GP's, consultants and physiotherapists – nevertheless this was a very pleasant experience and I would like to thanks all members of the team concerned. (196)
80. Dean and Rita were superb. No comments to add as all was fantastic (197)

81. Congratulations to Jeff Botwood and Marina Spear who made the whole experience so very educational and fun! With their help and guidance, I am now negotiating buying an automatic car and wireless keypad controls. (198)
82. Very helpful examiner and assistant, Malcolm Morgan (211)
83. The staff at the centre were fantastic. My assessor in particular was extremely good. He instantly put me at ease and used humour and sensitivity at exactly the right time. I highly recommend the staff at the centre. (212)
84. The team were welcoming and kind and went above and beyond to make me feel comfortable as I was very stressed and worried about the assessment. (213)
85. Thank you for your help and support (214)
86. Very professional and helpful service (215)
87. I didn't sleep the night before the assessment. Nervous, but felt very comfortable while at the centre. I had coffee, no milk. LOL (216)
88. I have not yet received a report from you as I was referred by the DVLA so were contacting them after the assessment and they have not yet contacted me yet. Thank you for your support on the day. (217)
89. Everything was fine from the start to the final assessment. Driving instruction in adapted vehicle by Julie was very good, would certainly recommend Julie for driving instruction for new and disabled persons. Michael Breen (218)
90. Really nice friendly bunch of people, welcoming, reassuring and helpful! (223)
91. I really appreciate the way Moira and Dave looked after me before and during the assessment. I felt reassured and confident by their support. I'm very grateful to all the team , in Cardiff and Pembroke Dock, for all their work and service. I await the DVLA decision in due course. A Laws (10.02.2022) (224)
92. Well organised – friendly and professional approach. (225)
93. I wasn't aware that I would drive through Cardiff for 45 minutes. I wasn't ready for that kind of test, I took it too soon, the staff did their job and were pleasant. I hadn't driven for 8 months, I had no choice. We live and learn. (226)
94. Dear Mrs Mundell, Thanks for arranging my driving test which was conducted in a very courteous and professional manner. The only difficulty was finding the exact location. A small road sign at the car park entrance may help. Please thank the staff for their helpful approach. Sincerely Michael O'Leary (227)
95. I noted many comments contained in the report, I was, as expected unhappy with the result as I probably have had some driving minor problems. I have to accept your judgement from your two examiners, who were both friendly and helpful on the day. I was Chairman of an Education Trust in Monmouth but I have decided as I cannot drive up to the Trust after 20+ years and 15 plus years as Chairman – I suspect the decision of your Examiners prompted me to retire!!!! (228)
96. Kind and friendly staff (231)
97. I would recommend self-referral to anyone over the age of 70 years! A positive experience (232)
98. Perhaps more staff? I'm waiting for a call back when you had slots available for practice lessons and a full assessment. (241)
99. The service I received was excellent. Both members of staff were very pleasant and approachable. Everything was explained clearly and simply and any queries were answered without being made to feel uncomfortable. Although the actual test was nerve

wracking, both staff members were very calm and approachable which made the experience a lot easier to undertake (242)
It is a pity that Dave was not the examiner for my appraisal in May 2021. He has got all the features and attributes needed for the job and should be commended for the way he undertakes the task in hand. (243)
Big thank you to Dean and Rita for a warm welcome, made me feel relaxed and in all a very enjoyable experience. 5* service. (245)
The DVLA is aware fully of my medical status – otherwise they would not re grant my licence.
In summary it is ancillary administration, rather than the practical assessment which I found excellent, that was frustrating for me to deal with.
I also have to say in "person to person" telephone calls your staff were efficient and understanding in resolving my difficulties. I trust you find the above constructive and useful. If I can be of further assistance, possibly by way of telephone interview I would be pleased to assist. (244)

NORTH WALES CSS RESULT COMMENTS 2021/2022

1. The OT and the DVLA Assessor were both very pleasant and helpful girls. Any nerves or worries I had were quickly sorted out and they made the driving part of my assessment relaxed and a lot easier than expected. 10/10.
2. Thank you.
3. I have never been to Bodelwyddan before and so was a little concerned of the drive of the car I would drive. Alison and Beverley were very helpful and put me at ease. They found a Ford C-Max, the same model as my car. Many thanks.
4. Brilliant.
5. The site at Bodelwyddan feels very cramped and it was difficult to park my Motability car and very little space to get in or out of the vehicle. Had to walk around the back of the building to find test car and leave my walker to the side of road. Felt sorry for the staff who had to rake my walker back inside of building, so wasting time there.
6. As you can see I was completely happy with the driving assessment. However, even though I appreciate there is a pandemic, my treatment by DVLA has been disgraceful. One week following the assessment I submitted the report together with a covering letter to the DVLA. In the meantime I received a driving licence renewal form from DVLA which I completed and returned. Several weeks later I was informed by DVLA that my assessment report had been mislaid. I then returned a copy of the assessment report together with a licence renewal form by recorded delivery. My driving licence expired on 09/08/21. I am still awaiting a reply from DVLA. I have tried to phone DVLA without success.
7. Felt disappointed with the result. Would more tuition have helped, was advised approx. 8 hours after the first assessment. Maybe more hours would have helped to get used to

the very unfamiliar adaptations, which would have made me feel a lot less anxious, as well as the tuition taking place closer to home. An option to retry would have been good. With regards to the assessment service itself, shouldn't the service be made more 'available' to the North West area, more of a mobile service. Why can't assessments take place closer to the client/come to the client. Also, I believe servicing the whole of North Wales, a bilingual service should be offered, not just a translator at the assessment.
8. I just wish I had had my pen and reading glasses with me for the cognitive test.
9. No improvements required. I was very satisfied with my experience at the mobility centre and all staff were very kind, understanding and very professional in all aspects.
10. I have only one comment on that I have to wait so long for my assessment after previous cancellations due to Covid. However, the waiting time gave me an opportunity to refresh my driving knowledge with the online tests which gave me a little more confidence.
11. The questionnaire I was sent indicated that to be assessed you had to be suffering from a condition that had to be reported to DVLA. This proved not to be the case and was resolved with a phone call. This could dissuade people from seeking assessment.
12. I was, as to be expected, somewhat apprehensive about taking the test but was made totally relaxed by my assessors who were very friendly and courteous. Excellent in all aspects. Thank you all.
13. Father has dementia so cannot remember enough to give feedback. Daughter booked appointment, received report and sent on to DVLA. Daughter very satisfied with the help and service received.
14. As I paid for the assessment and sent copy to Swansea, I have not had my licence replaced. The doctors have sent their report and I still have not had a replacement licence. Is it a waste of time having this assessment as DVLA take no notice?
15. BSL/SSE interpreter was excellent. My sister was excellent. I am deaf and have Asperger's Syndrome. I have OCD and arthritis. More information for mobility cars, automatic cars, mobility schemes and blue badges.
16. Service very good but don't remember a report - doesn't mean I didn't get one.
17. Very reassuring and professional. It would be hard to improve on.
18. Very helpful and knowledgeable.
19. I was told I would be called back in 3 weeks to trial an easier car. This has not happened and when I rang up the lady denied what was said, I am therefore left in limbo

20. Choose a better route. - *Service User advised to cease driving.*
21. My assessment was the result of a self-referral. I felt a qualified instructor would give fair judgement of my continuing ability to drive safely and in a competent and confident manner. An excellent service. Thank you.
22. My mother found that 2 passengers in the car was too much. A written outcome of the assessment would have been helpful. - *Service User advised to cease driving, DVLA referral.*
23. Found the Centre staff excellent.
24. Felt the whole assessment was rushed and in my case I found the whole experience very difficult as I suffer with cognitive impairment. I was not shown how to use the car controls, gears, indicators etc. I had to wear a mask and I wear glasses! My glasses fogged up constantly and I could not see where I was driving! Very dangerous and I actually had to stop the car as I could not see where I was driving. The assessor kept winding the windows down but it did not help. I understand that the wearing of face masks is a compulsory requirement, but in my case it worked very much against me, I felt very disorientated and as a consequence was advised not to drive and have been unable to drive since May 2021. - *Service User advised to cease driving, DVLA referral.*
25. It would have been far more convenient for me to have attended Newtown.
26. I was very well treated by the driving instructor and occupational therapist and I felt so confident being with them in and out of the car. I can't really think of anything that is needed to improve services that are so kind and understanding. I was very impressed and am looking forward to coming back after I have had my driving lessons.
27. Very satisfied.
28. Thank you.
29. A stamp would have been helpful on the return envelope, otherwise the Bodelwyddan staff were excellent. Thank you.
30. There is nothing to improve. Everyone is friendly, welcoming and informative.
31. My result answers speak for themselves. I was very impressed with everything on the day. 10/10 for the staff.
32. To find a way to encourage more of the 70+ to be tested.
33. It would have been much more convenient if I could have been assessed at Newtown, but Covid prevented this.

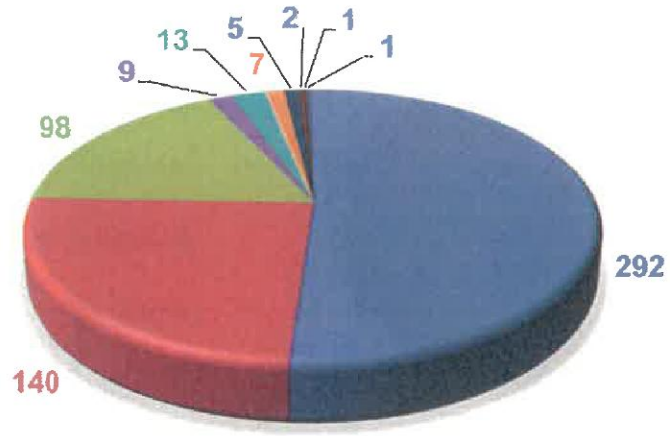
34. The office staff were always kind and courteous when we met and also when on the telephone, but very dissatisfied with the whole assessment process itself. I have written a letter to accompany this survey, most of which I had already stated to the DVLA after the driving assessment. - *Service User advised to cease driving, also enclosed accompanying letter with this survey.*
35. Very satisfied with overall assessment. Good interaction from staff made me feel at ease before driving assessment. Everything was explained to me.
36. Could do with somewhere for carers to sit down and have a drink.
37. Following a great response and service from Wales Mobility Service the report was sent to the DVLA and received on 22nd August 2021. I have yet had no response from them, not even a letter of acknowledgement.
38. I am very grateful for all your help and support.
49. Better to send the questionnaire 4 weeks after the assessment.
40. The 2 assessors that dealt with me were absolutely brilliant. Also, the lady who took me out driving to learn how to drive an adapted vehicle again was absolutely brilliant. Many thanks to them all.
41. I was both satisfied and encouraged by the assessment experience.
42. More visibility for the general public (publicity). Ability to offer the service through the medium of the Welsh language. Better parking provision for the Glan Clwyd Centre.
43. Really pleased with the attention to details. The whole process was conducted in a very professional but calm friendly way. Thank you.
44. Thank you for a splendid service.
45. I was more than satisfied with the service provided.
46. Can I just say that I was very impressed with the Wales Mobility Service. A special thank you to Tim and Bev - Excellent!
47. Have an adapted car available.
48. I served as an infantry soldier for 30 years and drove all vehicles. I was asked to drive in peacetime and on active service. - *Service User advised against driving.*
49. I was treated with efficiency and courtesy during my attendance at the centre. - *Service User advised against driving.*

50. Friendly, courteous staff. However, I wasn't made fully aware of the cognitive testing - it took me by surprise and made me panic.
51. Driving with a mask on was quite difficult for a spectacle wearer but unlikely to have appealed result much anyway. - *Service User advised against driving.*
52. Chris was brilliant - it is a shame he doesn't give driving lessons and these aren't directly provided by the Centre.
53. First class service. Thank you.
54. Have found the Mobility Centre staff to be most helpful at all times. Nothing too much trouble.

CHART 1 (a, b & c) SOURCES OF REFERRAL

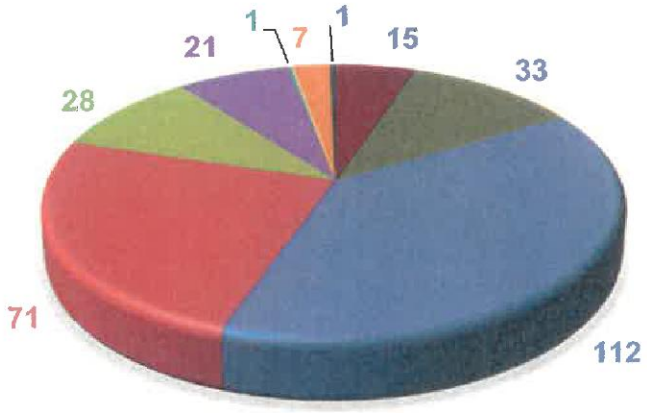
1st April 2021 to 31st March 2022

a) SOUTH WALES



- Client/family 292
- DVLA 140
- Motability MAP 98
- Health Professional 9
- NHS 13
- Police Fitness to Drive 7
- Solicitors 5
- Motability Grants 2
- Employment Agency 1
- Charity 1

b) NORTH WALES



- Client/family 112
- DVLA 71
- Motability MAP 28
- Health Professional 21
- NHS 1
- Police Fitness to Drive 7
- Solicitors 1
- Social Services 15
- Review following previous assesssment 33

CHART 1 (a, b & c) SOURCES OF REFERRAL

1st April 2021 to 31st March 2022

c) CHESTER

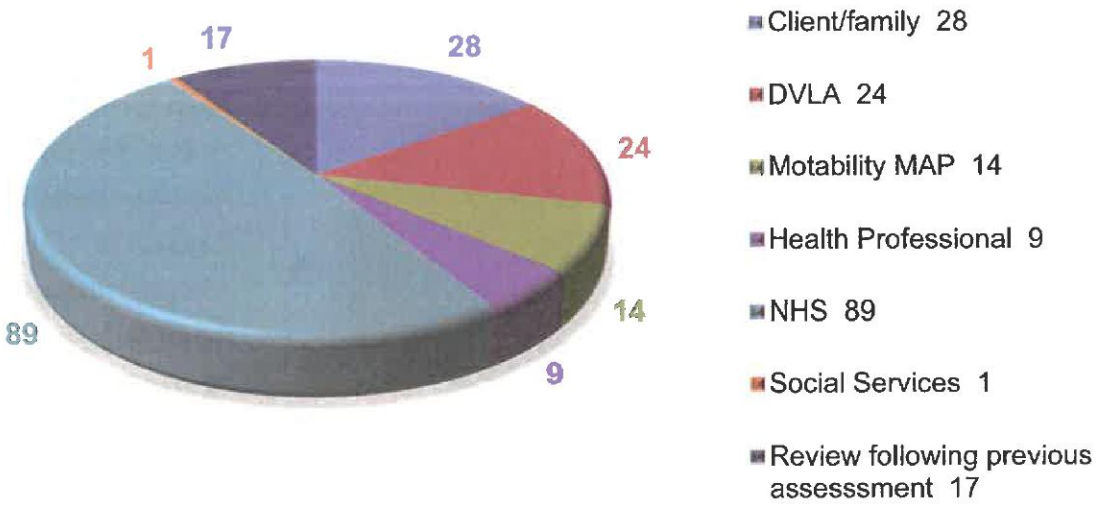
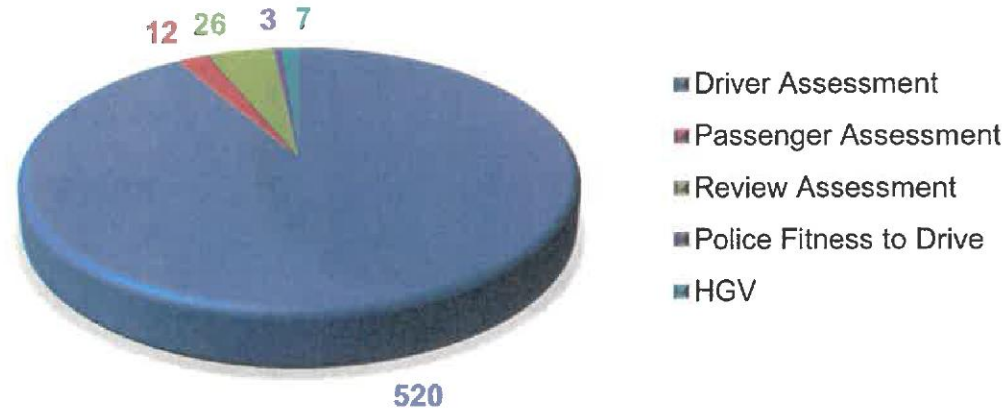


CHART 2 (a, b & c) ASSESSMENTS BY TYPE

1st April 2021 to 31st March 2022

a) SOUTH WALES



b) NORTH WALES

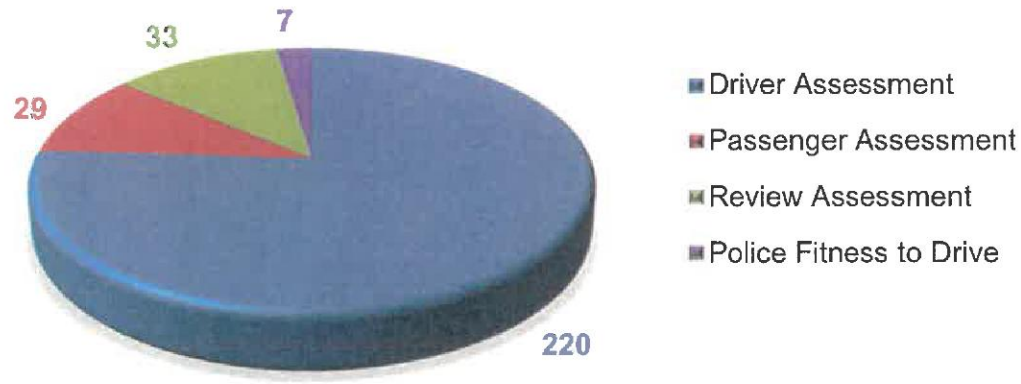


CHART 2 (a, b & c) ASSESSMENTS BY TYPE

1st April 2021 to 31st March 2022

c) CHESTER

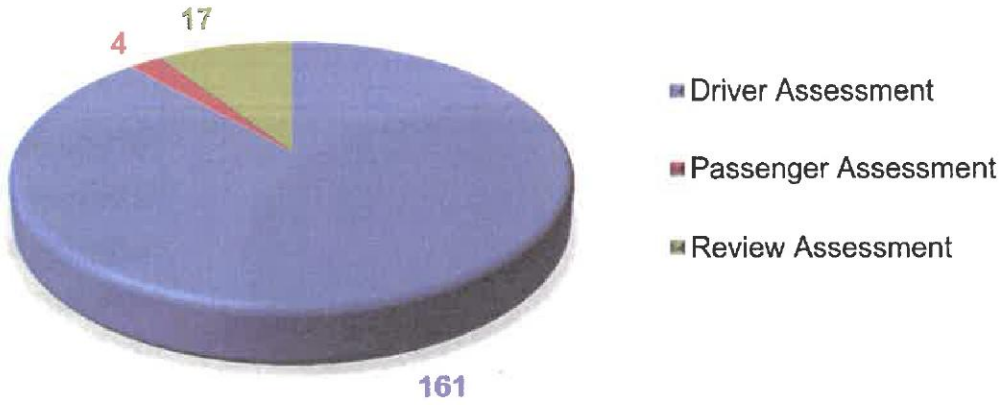
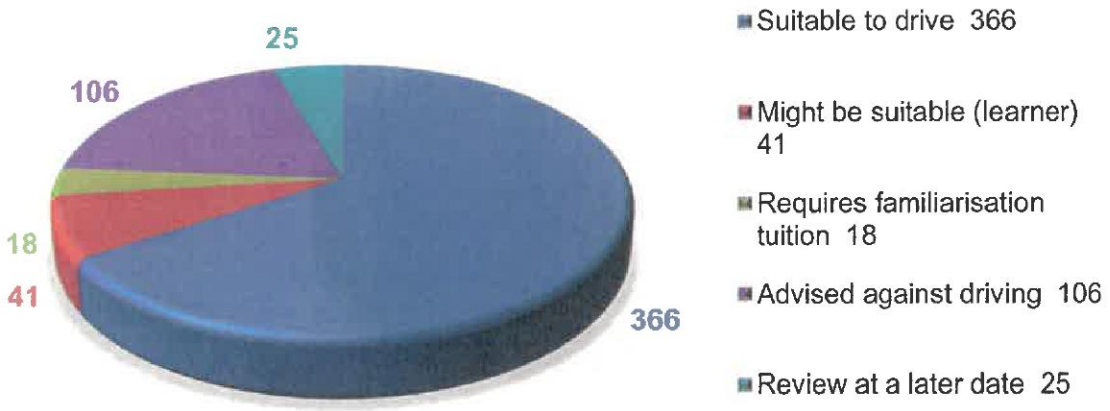


CHART 3 (a, b & c) OUTCOME OF DRIVING ASSESSMENT

1st April 2021 to 31st March 2022

a) SOUTH WALES



b) NORTH WALES

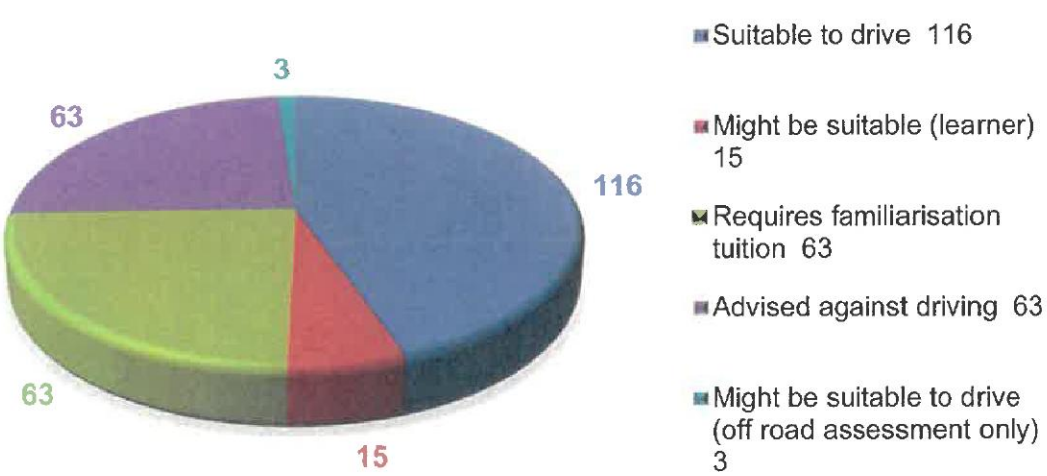


CHART 3 (a, b & c) OUTCOME OF DRIVING ASSESSMENT

1st April 2021 to 31st March 2022

c) CHESTER

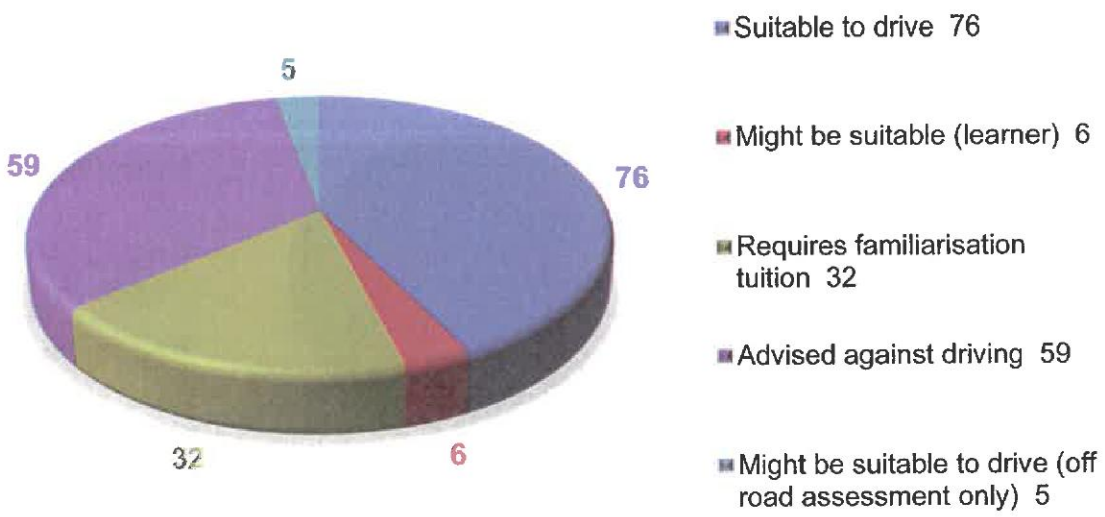
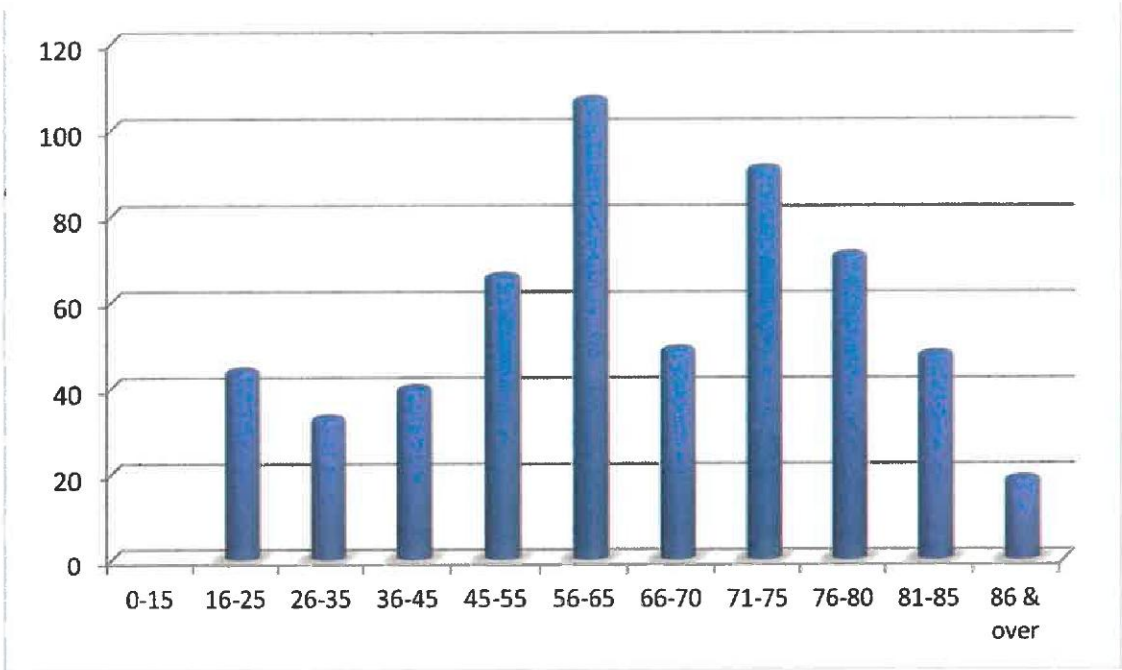


CHART 4 (a, b & c) CLIENT AGE GROUPS ASSESSED

1st April 2021 to 31st March 2022

a) SOUTH WALES



b) NORTH WALES

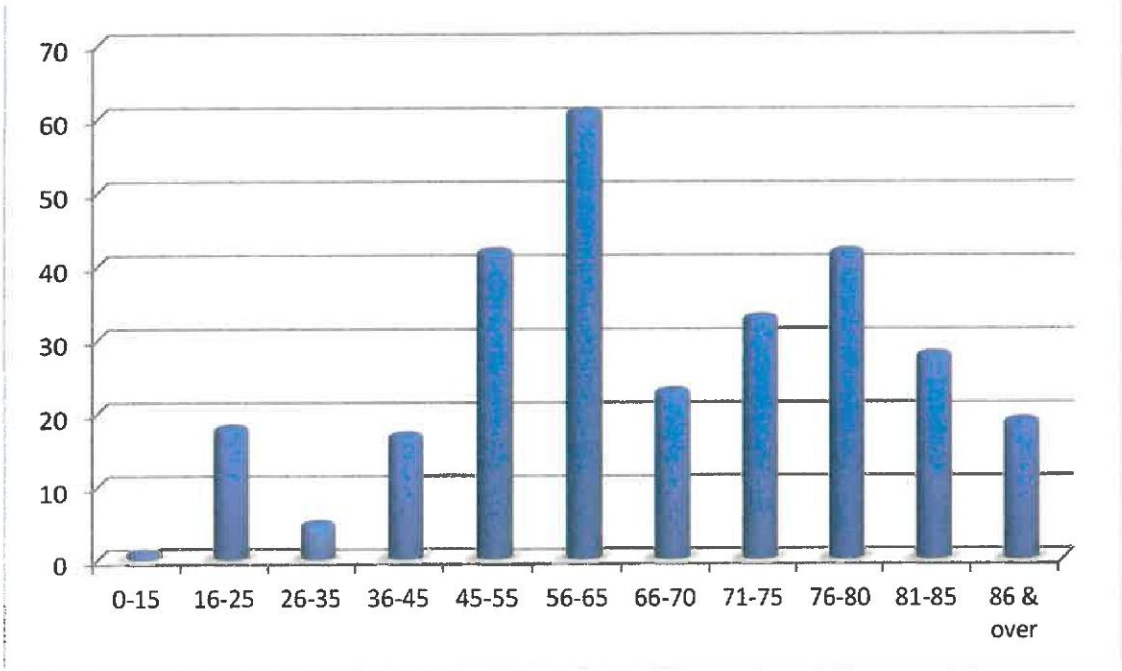


CHART 4 (a, b & c) CLIENT AGE GROUPS ASSESSED

1st April 2021 to 31st March 2022

c) CHESTER

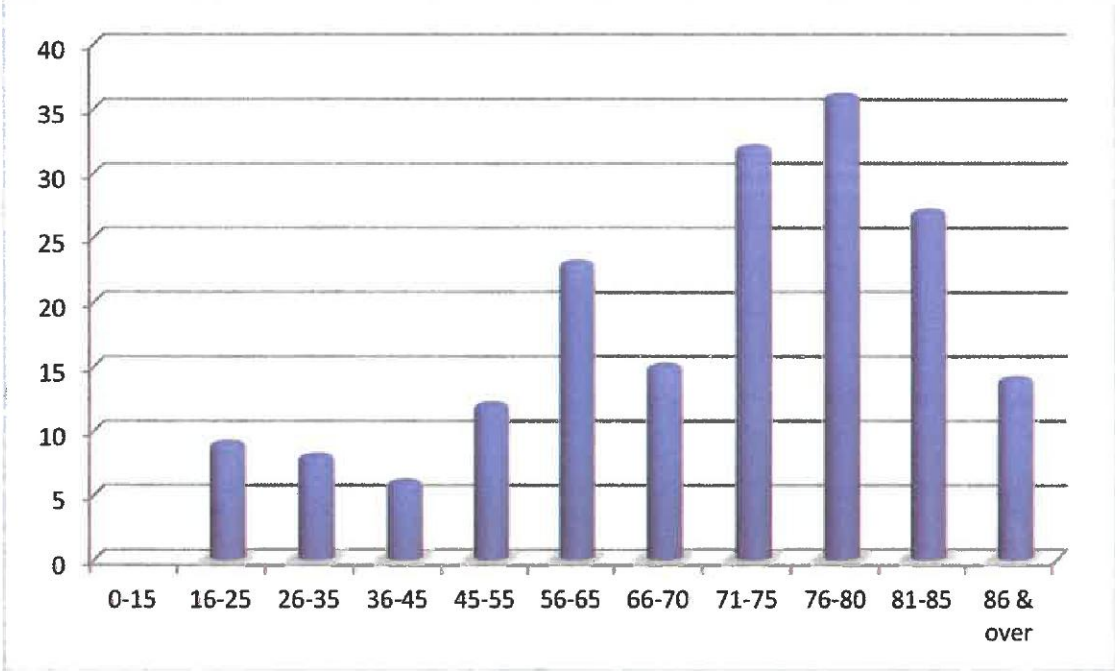
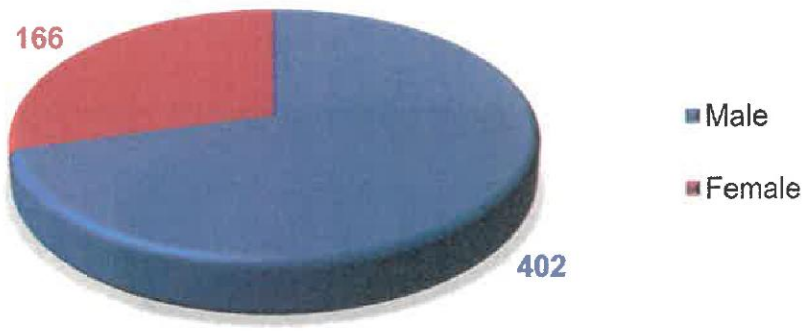


CHART 5 (a, b & c) NUMBER OF MALES AND FEMALES ASSESSED

1st April 2021 to 31st March 2022

a) SOUTH WALES



b) NORTH WALES

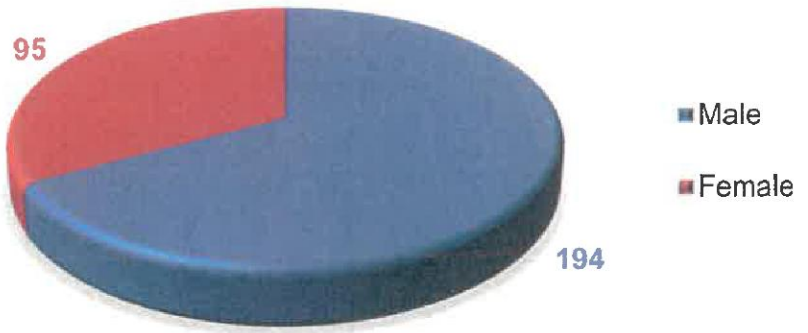


CHART 5 (a, b & c) NUMBER OF MALES AND FEMALES ASSESSED

1st April 2021 to 31st March 2022

c) CHESTER

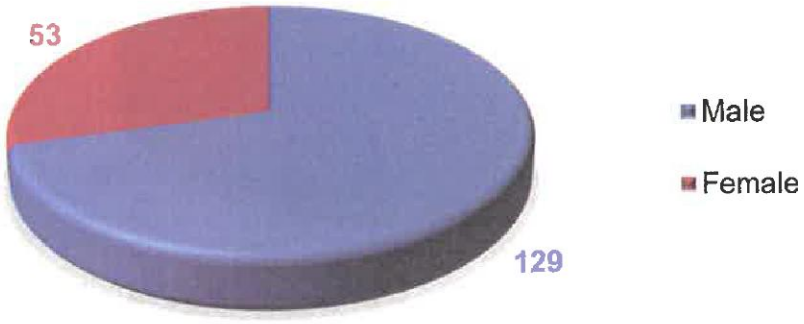
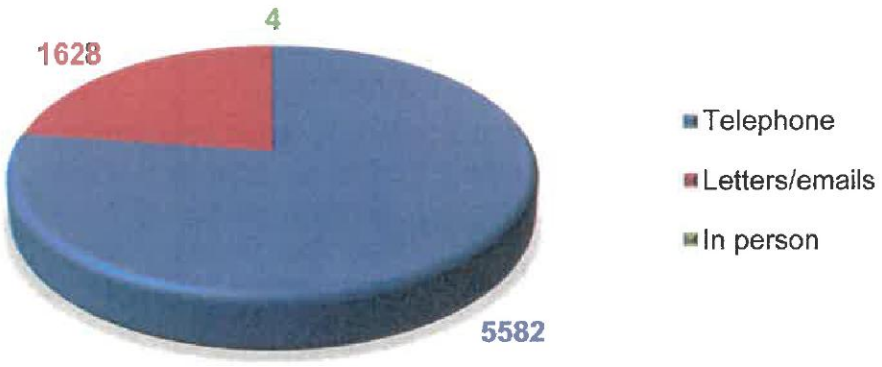


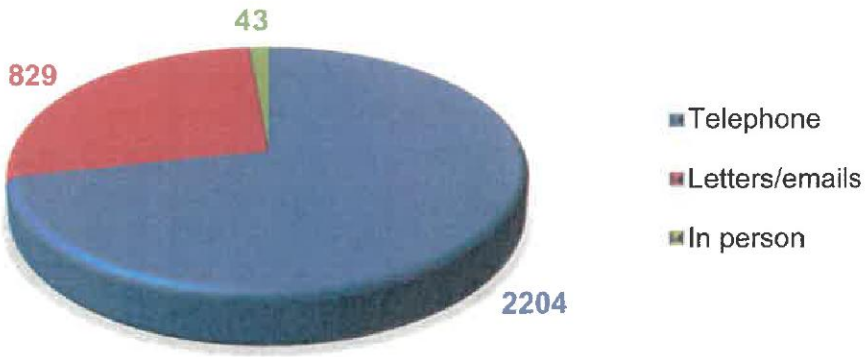
CHART 6 (a, b & c) NUMBER OF ENQUIRIES

1st April 2021 to 31st March 2022

a) SOUTH WALES



b) NORTH WALES



NUMBER OF CLIENTS IN MAIN DIAGNOSTIC GROUPS

1st April 2021 to 31st March 2022

a) SOUTH WALES

Diagnostic Group	Total
Acquired limb abnormalities	21
Acute gen. brain damage (non-traumatic)	4
Acute gen. brain damage (traumatic)	27
Back problem	1
Brain tumour	
Cerebral palsy	11
Congenital learning disabilities	16
Congenital limb disabilities	12
Dementia	123
Older people - no notifiable condition	16
Heart and lung problems (younger people)	3
Inflammatory arthritis	8
Motor neurone disease	9
Multiple sclerosis	33
Muscular dystrophy	2
Osteoarthritis	2
Other neurological diagnosis	44
Other non-neurological diagnosis	9
Parkinson's disease	26
Peripheral vascular amputations	10
Poliomyelitis	1
Mental health	4
Spina bifida	2
Spinal cord injuries	25
Stroke, left hemiplegia	24
Stroke, other	75
Stroke, right hemiplegia	10
Static visual field defect	6
Traumatic amputation arms or legs	32
Muscle diseases	1
Diabetes	11
TOTAL	**568**
Of the total number of assessments, how many were referrals from: Motability	**98**
Of the total number of assessments, how many were referrals from: DVLA	**140**

NUMBER OF CLIENTS IN MAIN DIAGNOSTIC GROUPS

1st April 2021 to 31st March 2022

b) NORTH WALES

Diagnostic Group		Total
Acquired limb abnormalities		9
Acute gen. brain damage (non-traumatic)		5
Acute gen. brain damage (traumatic)		5
Back problem		5
Brain tumour		1
Cerebral palsy		16
Congenital learning disabilities		24
Congenital limb disabilities		3
Dementia		65
Older people - no notifiable condition		18
Heart and lung problems (younger people)		
Inflammatory arthritis		
Motor neurone disease		2
Multiple sclerosis		18
Muscular dystrophy		2
Osteoarthritis		6
Other neurological diagnosis		29
Other non-neurological diagnosis		1
Parkinson's disease		10
Peripheral vascular amputations		8
Poliomyelitis		
Mental health		3
Spina bifida		3
Spinal cord injuries		8
Stroke, left hemiplegia		13
Stroke, other		18
Stroke, right hemiplegia		14
Static visual field defect		1
Traumatic amputation arms or legs		2
Muscle diseases		
TOTAL		**289**
Of the total number of assessments, how many were referrals from:	**Motability**	**28**
Of the total number of assessments, how many were referrals from:	**DVLA**	**71**

NUMBER OF CLIENTS IN MAIN DIAGNOSTIC GROUPS

1st April 2021 to 31st March 2022

c) CHESTER

Diagnostic Group	Total
Acquired limb abnormalities	1
Acute gen. brain damage (non-traumatic)	2
Acute gen. brain damage (traumatic)	7
Back problem	
Brain tumour	1
Cerebral palsy	5
Congenital learning disabilities	1
Congenital limb disabilities	2
Dementia	55
Older people - no notifiable condition	15
Heart and lung problems (younger people)	
Inflammatory arthritis	
Motor neurone disease	1
Multiple sclerosis	7
Muscular dystrophy	
Osteoarthritis	1
Other neurological diagnosis	9
Other non-neurological diagnosis	
Parkinson's disease	5
Peripheral vascular amputations	3
Poliomyelitis	
Mental health	2
Spina bifida	
Spinal cord injuries	3
Stroke, left hemiplegia	16
Stroke, other	36
Stroke, right hemiplegia	9
Static visual field defect	
Traumatic amputation arms or legs	1
Muscle diseases	
TOTAL	**182**
Of the total number of assessments, how many were referrals from: Motability	**14**
Of the total number of assessments, how many were referrals from: DVLA	**24**

Charity registration number: 1056588

Wales Mobility Driving Assessment Service

Annual Report and Financial Statements

for the Year Ended 31 March 2022

HSJ Accountants Limited
Severn House
Hazell Drive
Newport
NP10 8FY

Wales Mobility Driving Assessment Service

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Wales Mobility Driving Assessment Service

Trustees' Report

The Trustees present their report and financial statements of the charity for the year ended 31st March 2022

Structure, Governance and Management

The Wales Mobility & Driving Assessment Service (WMDAS) is located in South Wales at Rookwood Hospital, Llandaff, Cardiff and in North Wales at the Disability Resource Centre, Ysbyty Glan Clywd, Bodelwyddan, Denbighshire. Satellite services are operated in Mid Wales based at Montgomery Hospital, Newtown and West Wales in South Pembrokeshire Community Hospital. Many people from the borders of England and Wales have traditionally been referred to the North Wales service because of geographical proximity. The North Wales Manager, Gary Jones, supported by Driving Mobility and financed by the Department for Transport (DfT) in England, developed and established a new centre in Chester to undertake assessments for the ever-increasing number of referrals from this area. In Chester, the DfT pays an amount to meet the near actual cost for each assessment in keeping with their policy for all other English centres. DfT also fully funded the setting up costs and other WMDAS resource costs needed to establish the Chester service

The WMDAS is a registered Charity No. 1056588 set up under a trust deed. The service is funded by a Welsh Government Grant under section 64 of the Health Services and Public Health Act 1968. However, as from April 2016, the format of the grant was changed from ongoing 'core' funding to 3 year 'project' funding that requires a fresh re-submission every three years as well as detailed interim reports on a half yearly basis. This funding is allocated on a yearly basis subject to the terms and conditions set by the Welsh Government (WG), one of which is attaining the targets that have been set year on year. Re-application for the grant is in competition with other charities in Wales. This format of funding makes the future of the charity less secure and will require alternative streams of funding, at best to supplement, and at worst to replace, this source of funding. The grant is for *all* Wales and the Director who is based at the South Wales Centre manages the budget for both Centres.

The South Wales Centre operates under a Service Level Agreement with Rookwood Hospital where accommodation and utilities are provided free of charge in exchange for the services of centre staff in helping with the assessment and rehabilitation of inpatients and providing teaching to staff. The entire in-patient hospital has now relocated to Llandough Hospital during 2021/22 and new premises for the WMDAS are in the process of being refurbished on the NHS retained part of the Rookwood site though in a different building. The North Wales centre, located in The Disability Resource Centre, pays an annual rent which includes their utilities. Both centres pay their own Telecom and other costs. Both the DVLA and Motability pay the cost for any referrals they make to either centre. In all other cases, clients are self-referring and pay a set fee towards the cost of the assessment.

The service offers both driver and passenger assessments to provide the client with a long-term mobility solution. The driving assessment is not a driving test. The aim of the assessment is to evaluate the current physical and cognitive ability of the individual to drive a motor vehicle in safety and comfort at the time of the assessment.

Clients are sometimes assessed on a static assessment rig (SAR) for their reaction times, steering strengths and to determine what adaptations (if any) are required. Clients are then assessed in a vehicle with adaptations where necessary in off-road and on-road situations. A report and relevant leaflets and information are sent to the client within 10 days of the assessment.

Passenger assessments are undertaken for clients who experience difficulties with access to and from a vehicle. The centres have a wide range of equipment that may reduce or eliminate the physical effort involved during transfers.

The centres also provide a free information and advice service and can advise on a range of issues including DVLA, legislation, Motability schemes, driver tuition, vehicle adaptation firms, insurance companies, and much more. A WMDAS website provides access to booking and paying for assessments online.

Wales Mobility Driving Assessment Service

Trustees' Report

Objectives

To provide a high-quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living throughout Wales by enabling them to resume or remain independently mobile.

Trustees and organisational structure

The Wales Mobility & Driving Assessment Service has an Executive Committee of 9 members who meet quarterly or sooner if needed and are responsible for the strategic direction and policy of the charity. The Committee is comprised of members from a variety of backgrounds relevant to the work of the charity.

Communication between Centres. The geographical challenges of North and South Wales make road connections long and difficult and this had resulted in a degree of isolation of the centres. However in past years, we have managed to strengthen the links by several means. As it is now easy and cheap to travel by plane between Cardiff and Anglesey for a day visit, staff have been able to meet up and share practice on the ground, including shadowing. Due to lockdown, Virtual Zoom and Teams have become the usual way to keep in touch and to hold Trustee, Staff and Management meetings. This method has proved very beneficial and will form part of the future. Trustees, who are mostly based in South Wales, have also been able to visit North Wales and we now have three Trustees from North Wales, who have attended meetings via Zoom. Furthermore, the Minutes of the Trustees' meetings are circulated to the North Wales Advisory committee, the North Wales Manager and North Wales and South Wales staff. Centre Managers are present at Trustee meetings.

Funding the Service. For over 30 continuous years until the end of 2018/2019, the WMDAS main source of funding for its activities in Wales was via a (recurrent) 3-year Welsh Government grant scheme. When the focus of this 3-year grant scheme was then changed from core funding to project funding, the WMDAS was unsuccessful in its funding bid. However, the Welsh Government did decide to maintain a grant to WMDAS on an annual basis at £265k from 2019/20.

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a three-year funding award to WMDAS with an increased funding allocation of £360k for each of the years 2022/23, 2023/2024, 2024/25. This much welcomed and needed 3-year grant award together with the uplift in grant funding now provide WMDAS with greater stability as we move forward in developing and delivering our service provision in Wales.

The Welsh Government's grant is administered through the South Wales Centre and the Director has the overall responsibility for managing the utilisation of these grant resources throughout the WMDAS and liaising with the Welsh Government on all grant matters. In undertaking this task, the Director also ensures (on an ongoing basis) that the Trustees are kept fully and properly informed of the WMDAS' financial position.

Links with Driving Mobility. Both centres are affiliated to and accredited by Driving Mobility (DM) and work in compliance with DM Governing Documents, as well as the grant requirements stipulated by the Welsh Government and the Charity Commission. The interlinks between the two centres and Driving Mobility (DM) have also become stronger. DM is the umbrella organisation for DfT to manage policy making for the UK centres and has also been proactive in making assessment results across the centres transparent and are continually working with centres towards better standardisation and comparable outcomes.

Increased complexity of rules and regulations: There has been increased demands for complex databases and explicit written policies and procedures for evolving aspects of the law from various departments of WG, the bank and the Charity Commission as well as the existing ones for audit from DM and Dft. These cover Privacy Policies and cyber security This continues to put further time demands on the managers and the Director.

Wales Mobility Driving Assessment Service

Trustees' Report

Risk Management

The Board of Trustees has conducted a review of the major risks to which the charity is exposed and where appropriate, systems and procedures have been established to mitigate the risks the charity faces.

(1). Age of Trustees: Many of the Trustees were long serving and there was a lack of new potential Trustees seeking election over a number of years. We are now fortunate to have elected new Trustees who have different backgrounds and skills to inform our consideration. A further two Trustees have been co-opted on the Executive Committee in 2022 who bring additional skills and expertise to the existing Board.

(2). Age of South Wales staff: The mean age of the staff in the Driving Assessment Centre in South Wales was at or above retirement age and has been ameliorated. Two staff members retired and following the employment of new staff across the service the staffing is now more representative of the working age population.

Achievements and Performance

1. *Main Service Provision and Activity.*
2. *Awareness Training and Teaching:*

Coronavirus resulted in the centres' closure for 6 weeks at the beginning 2021/22. Nevertheless, all targets were met

STATISTICS:

The overall numbers of clients assessed between 1 April 2021 and March 31 2022

No of Assessments	South/West Wales	North/Mid Wales	Chester	Total
2017/18	565	310	108	983
2018/19	583	232	152	967
2019/20	615	290	159	1064
2020/21	237	91	44	371
2021/22	**570**	**289**	**182**	**1041**

Of the 1041 assessments in 2021/22: **76** were review driving assessments and 45 passenger assessments.

Referral sources in 2021/22: Self / family: 432 DVLA:235 Motability MoMap: 140 NHS/Health Professionals: 39 Social Services:20.

Customer Satisfaction Survey This year's Survey again shows WMDAS is fulfilling the expectations and needs of clients (with 98% of respondents marking satisfied and very satisfied with the service)

To ensure a representative view of service users, irrespective of the outcome of their assessment, a Customer Satisfaction Survey was sent to all clients who had attended between April 2020 to March 2021. However, in cases that had potential to cause distress to the client or client families, a decision was made to withdraw these

individuals from circulation of this survey. This refers to clients who have attended for assessment and who have no insight into their deficits caused by cognitive decline. It also refers to clients who have attended but have passed away. Clients who returned for review are not routinely sent a CSS as some attend at 6 monthly intervals. NW includes outcomes for Mid and North Wales, South Wales includes West Wales outcome.

The full set of data gathered during 2021/22 can be viewed on request. A summary of the data is contained in the Director of Services report.

(b) Chester Driveability

Gary Jones has successfully set up a thriving new driving assessment centre in Chester which has gone from strength to strength to meet an expanding demand from this part of England that hitherto has been directed to the North Wales centre. During 2021, Gary prepared a Chester Driveability Business Plan for the 3 years 2022/23 to 2024/25 which set out how the service provided at Chester could be further developed and expanded to meet client demand. This Plan was agreed by WMDAS, Driving Mobility and the Department for Transport and its implementation is now proceeding.

(c) *Adapted – Vehicle Driver Training Service*

The driver training service has been expanded to service clients with mobility problems. **118** clients received this service with **771** hours of driver training in a range of adapted vehicles during 2021/22. This service has proved extremely popular and has provided a lifeline to those with disabilities as prior to WMDAS developing this service, there were almost no driving schools with the expertise or adapted cars to accommodate those who are unable or unsafe to drive in the conventional manner. This useful service is also a revenue raising activity for WMDAS.

(d) *Older Driver Development Programme*

The service developed with Denbighshire County Council and neighbouring counties was suspended in 2021/22 because of Covid and Government restrictions

(e) Older Driver Fitness to Drive pilot scheme.

This initiative is a joint WMDAS / Dyfed Police project that aims to assess fitness to drive in older drivers who have been reported for committing a road traffic offence. In 2021/22 The Older Driver Fitness to Drive scheme was suspended because of Coronavirus during 2020/21 and remained suspended for some months in to the 2021/22 period. Referrals were received in the later part of 2021 from Dyfed Powys Police. Following a recommendation from the Coroner at Swansea Crown Court, South Wales Police have expressed a wish to use our service followed by enquiries from Gwent Police. Negotiations have been on going and once the Business case has been improved WMDAS will begin accepting referrals from South Wales and Gwent Police Forces in the summer of 2022.

(e) Welsh Rugby Union Charitable Fund. Links have been made between the South Wales Centre and the WRU Charitable Fund who now refer their clients to the centre for specialist help with mobility and driving needs.

There were no face to face training or teaching courses undertaken during 2021/22 due to Coronavirus restrictions but virtual presentations were given to several organisations including Flintshire Physiotherapy Team, Powys Older Age Psychiatry, and the Stroke Association.

(a) *Open Days* - Not organised due to Government Restrictions

(b) *Clinical staff training*.

In South Wales, clinical staff and medical advisors from the DVLA have had one-to-one observation sessions. In North Wales staff gave virtual presentations to neuromuscular centres and clinical staff at various hospitals and centres.

(c) *Awareness training for other individuals and organisations.* These take the form of presentations and demonstrations and are given to Memory and Stroke services; support workers; OTs working in the community and Accredited Driving Instructors but again due to Covid restrictions these visits were cancelled in 2021/22

(d) *Contribution to formal education courses in assessing driving mobility.*

Gary Jones, North Wales Manager, continues to be significantly involved in the DM Education Modules.

Gary Jones has also been instrumental in the setting up of a new educational course at Oxford Brookes University which has replaced studying at Chester University and continued his role as an Associate Tutor for Driving Mobility. Alison Kay, Lead Driving Adviser/OT retained her position on the Driving Mobility education working group.

Continuing Professional Development

Two members of staff (North & South Wales) began studies through the Driving Mobility Academic Programme with Oxford Brookes University towards the award of *Certificate of Higher Education – Driving Assessment and Outdoor Mobility,* and a further member of staff (South Wales) began studies through Driving Mobility Academic Programme with Oxford Brookes University towards the award of *Post Graduate certificate – Driving Assessment and Outdoor Mobility.* To date each student has completed 2 of their 3 mandatory modules of study. Staff have also taken part in virtual courses on safeguarding, first aid, disability awareness and complaint handling.

Vehicle and Office Equipment Renewal.

Following the South Wales reaccreditation in 2021, office and assessment equipment and vehicles have been updated and maintained in accordance with criteria set by Driving Mobility to maintain accreditation status. The centres in Newtown and Pembroke Dock gained accreditation in 2019. North Wales will be receiving an accreditation visit in 2022.

Although most of the staff have returned to working in the centres some remain working from home and continue to use IT solutions which were installed to allow for improved internet and telephone communication.

PPE and infection control systems installed in accordance with Driving Mobility Standard Operational Policies are still in operation.

Financial Review

The principal funding source of the Charity in 2021-22 remained the Welsh Government under their 'project' grant funding arrangements. Within the conditions of the grant, for the 3 years 2016-17 to 2018-19 our overall grant was reduced by 5% each year and our 2019-20, 2020-21 and 2021-22 grant funding was maintained at the 2018-19 level of £265,000 per annum which represents further real term cuts. By comparison, centres in England financed by the DfT, have received an annual increase in funding over the same period.

Salaries and earnings-related costs including the Government Pension Scheme introduced in January 2017 continue to represent the largest element of expenditure, details of which can be found in the Statement of Financial Activities. The pressures on our financial stability and future sustainability as a consequence of the Welsh Government's grant funding regime arrangements have increased year by year and have acted as a constraint on meeting client demand for our services. The free assessment through the NHS referral pathway remains closed and all clients continue to pay for their assessments apart from those who are in-patients and are assessed and as part of their care package.

Clients are given the option of referral through Motability or DVLA if they feel unable to afford the cost of the assessment.

The level of the Charity's assessment fee has been kept under critical review and was unchanged at £120 from April 2020. At this fee level, clients only meet a proportion of the real cost of an assessment which in 2018-19 was estimated to be well over £500. There will be ongoing pressures on both expenditure and income over future years as the demand for services continues to grow. The Director and Trustees will continue to monitor our income and expenditure across the range of our organisation's activities. Proposals for any new activity will need to be considered against our other service delivery priorities and also demonstrate that they are cost effective and affordable.

Covid and the Welsh Government responses have again impacted on our operational activity in 2021-22. Financially, we have faced a reduction in income with assessment numbers and the associated fees they generate down and the additional costs incurred in meeting the Welsh Government requirements to ensure that our Centres are Covid safe for both staff and clients. For 2022-23 and beyond it is impossible to predict with any certainty what impacts Covid and the Welsh and UK Governments responses may have on our organisation. We can only respond in a considered and flexible way as issues emerge.

All the 2020-21 Welsh Government funding was used as agreed and budgeted as detailed in the Business Plan with some adjustments to meet unplanned for Covid costs.

The opening balance in the current account on April 1st, 2021 was £20,555 and the closing balance on March 31st 2022 was £7,552.

During 2021, the Welsh Government reviewed its overall grant funding approach to WMDAS and made a 3-year grant award to WMDAS with an increased funding level of £360,000 for each of the years 2022-23 to 2024-25. WMDAS are delighted with this news and these additional resources will generally be applied to employ additional staff; to mitigate inflation pressures and meet increased levels of employer NIC contributions. The impact these additional grant resources will have in meeting the demands for WMDAS services will be monitored by WMDAS management and Trustees.

Reserves policy

It is the general policy of the charity to work towards accumulating unrestricted funds not committed or invested in tangible fixed assets representing between three and six months of expenditure. At this level the Trustees consider that sufficient unrestricted reserves would be in place to cope with planned or emergency replacement of capital equipment, and the activities of the charity could continue in the event of a sudden drop in funding and/or increase in expenditure. At the end of March 2022, the Charity's unrestricted reserves stood at some £80,841 This represents a decrease of £45,000 in our unrestricted reserves since 1 April 2021. Sustaining our unrestricted reserves at over £100,000 will remain extremely difficult in future years given the increasing demand pressures for our services and the need to balance our income/expenditure position to ensure the ongoing and future viability of the Charity. The Trustees will continue to monitor our unrestricted reserves position.

Plans for future periods

Welsh Government funding has been allocated for three years which has allowed the option to employ additional staff to process the additional assessments generated by referrals from South Wales and Gwent Police forces. Additional staff will allow the waiting list of currently 10 weeks to be decreased in South Wales. The space for additional staff has been made possible because the South Wales centre will be relocating in the summer of 2022 to refurbished premises on the existing Rookwood site which provides space in which three assessment teams can work in one day.

The new premises will provide electric points for the use of electric vehicles which the Cardiff centre hopes to obtain during 2022/23.

Trustees' Report

In North Wales, the present premises are not able to offer electrical outlets for electric vehicles and the car parking situation presents accessing difficulties for visitors and clients. During 2022/23 alternative premises will be explored and costed.

Driver Training for those who have been assessed and need practise of driving in a new way using adaptations has been developed and proved extremely popular. There are few driving schools who have vehicles with adaptations therefore the centres use their vehicles and their experienced driving instructors to provide this essential service.

This provides a small additional revenue for WMDAS.

Reference and Administrative Details

Trustees	Dr M Stevenson Dr P McKenna Mr J Carter Ms L Harrington Mr P Brewer Ms J McKinlay Ms C S Sowden-Taylor Mr D Hughes Mrs A Duckworth
Secretary	Dr P McKenna
Principal Office	Rookwood Hospital Fairwater Road Llandaff Cardiff CF5 2YN
Charity Registration Number	1056588
Bankers	Lloyds Bank 514 Cowbridge Road East Victoria Park Cardiff CF5 1BL
Independent Examiner	HSJ Accountants Limited Severn House Hazell Drive Newport NP10 8FY

Wales Mobility Driving Assessment Service

Trustees' Report

Statement of Trustees' Responsibilities

The trustees are responsible for preparing the trustees' report and the financial statements in accordance with the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

The law applicable to charities requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

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

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The annual report was approved by the trustees of the charity on ..... and signed on its behalf by:

.....
Dr M Stevenson
Chairman and Trustee

.....
Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Independent Examiner's Report to the trustees of Wales Mobility Driving Assessment Service

I report to the charity trustees on my examination of the accounts of the charity for the year ended 31 March 2022 which are set out on pages 10 to 17.

Respective responsibilities of trustees and examiner

As the charity's trustees of Wales Mobility Driving Assessment Service you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Wales Mobility Driving Assessment Service's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

Since Wales Mobility Driving Assessment Service's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of FCCA ACA DChA BFP, which is one of the listed bodies.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of Wales Mobility Driving Assessment Service as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Mr Andrew Hill
FCCA ACA DChA BFP

Severn House
Hazell Drive
Newport
NP10 8FY

Date: 24/08/2022

Wales Mobility Driving Assessment Service

Statement of Financial Activities for the Year Ended 31 March 2022

	Note	Unrestricted funds £	Restricted funds £	Total 2022 £
Income and Endowments from:				
Donations and legacies		7,643	-	7,643
Charitable activities		147,475	339,532	487,007
Investment income	4	55	-	55
Total income		155,173	339,532	494,705
Expenditure on:				
Charitable activities		(216,900)	(339,532)	(556,432)
Total expenditure		(216,900)	(339,532)	(556,432)
Net movement in funds		(61,727)	-	(61,727)
Reconciliation of funds				
Total funds brought forward		261,552	-	261,552
Total funds carried forward	13	199,825	-	199,825

	Note	Unrestricted funds £	Restricted funds £	Total 2021 £
Income and Endowments from:				
Donations and legacies		7,100	-	7,100
Charitable activities		150,398	313,312	463,710
Total income		157,498	313,312	470,810
Expenditure on:				
Charitable activities		(158,536)	(313,312)	(471,848)
Total expenditure		(158,536)	(313,312)	(471,848)
Net movement in funds		(1,038)	-	(1,038)
Reconciliation of funds				
Total funds brought forward		262,590	-	262,590
Total funds carried forward	13	261,552	-	261,552

All of the charity's activities derive from continuing operations during the above two periods.

The funds breakdown for 2021 is shown in note 13.

Wales Mobility Driving Assessment Service

(Registration number: 1056588)
Balance Sheet as at 31 March 2022

	Note	2022 £	2021 £
Fixed assets			
Tangible assets	10	97,856	96,937
Current assets			
Debtors	11	15,713	19,468
Cash at bank and in hand		88,650	147,367
		104,363	166,835
Creditors: Amounts falling due within one year	12	(2,394)	(2,220)
Net current assets		101,969	164,615
Net assets		199,825	261,552
Funds of the charity:			
Unrestricted income funds			
Unrestricted funds		199,825	261,552
Total funds	13	199,825	261,552

The financial statements on pages 10 to 17 were approved by the trustees, and authorised for issue on ..... and signed on their behalf by:

.....
Dr M Stevenson
Chairman and Trustee

.....
Mr J Carter
Trustee

Notes to the Financial Statements for the Year Ended 31 March 2022

1 Accounting policies

Exemption from preparing a cash flow statement
The charity opted to early adopt Bulletin 1 published on 2 February 2016 and have therefore not included a cash flow statement in these financial statements.

Income and endowments

Donations and legacies

Donations are recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Investment income

Investment income is recogised on a receivable basis.

Charitable activities

Income from charitable activities includes income recognised as earned (as the related goods or senrices are provided) under contract or where entifiement to grant funding is subject to specific performance conditions. Grant income included in this category provides funding to support programme activities and is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Expenditure
All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category. Where costs cannot be directly attributed to particular headings they have been allocated on a basis consistent with the use of resources, with central staff costs allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use. Other support costs are allocated based on the spread of staff costs.

Charitable activities

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

Support costs
Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources, for example, allocating property costs by floor areas, or per capita, staff costs by the time spent and other costs by their usage.

Governance costs
These include the costs attributable to the charity's compliance with constitutional and statutory requirements, including audit, strategic management and trustees's meetings and reimbursed expenses.

Taxation
The charity is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the charity is potentially exempt from taxation in respect of income or capital gains received within categories covered by Chapter 3 Part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

Tangible fixed assets
Individual fixed assets costing £1,000.00 or more are initially recorded at cost.

Depreciation and amortisation
Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Asset class	Depreciation method and rate
Fixtures & fittings	20% on reducing balance
Motor vehicles	25% on reducing balance
Computer equipment	25% on reducing balance

Cash and cash equivalents
Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

Fund structure
Unrestricted income funds are general funds that are available for use at the trustees's discretion in furtherance of the objectives of the charity.

Restricted income funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

2 Income from donations and legacies

	Unrestricted funds		
	General	Total 2022	Total 2021
	£	£	£
Donations and legacies;			
Donated assets and services	6,500	6,500	6,500
Donations from individuals	1,143	1,143	600
	7,643	7,643	7,100

3 Income from charitable activities

	Unrestricted funds General £	Restricted funds £	Total 2022 £	Total 2021 £
Assessment fees - Wales	102,638	-	102,638	57,431
Assessment fees - Chester	-	74,532	74,532	48,312
Welsh Government	-	265,000	265,000	265,000
Lessons	40,212	-	40,212	11,158
Covid-19 Support - CJRS	4,625	-	4,625	81,809
	147,475	339,532	487,007	463,710

4 Investment income

	Unrestricted funds General £	Total 2022 £
Interest receivable and similar income;		
Interest receivable on bank deposits	55	55

5 Expenditure on charitable activities

	Note	Unrestricted funds General £	Restricted funds £	Total 2022 £	Total 2021 £
Assessment and advice services		140,492	8,023	148,515	129,487
Staff costs		72,304	331,509	403,813	339,885
Governance costs		4,104	-	4,104	2,476
		216,900	339,532	556,432	471,848

6 Analysis of governance and support costs

Support costs allocated to charitable activities

	Basis of allocation	Staff costs £	Administration costs £	Premises costs including depreciation £	Total 2022 £	Total 2021 £
Assessment and advice services	A	95,000	9,223	4,000	108,223	76,180

Basis of allocation

Reference	Method of allocation
A	Caluclated on a percentage of support time incurred

7 Trustees remuneration and expenses

No trustees, nor any persons connected with them, have received any remuneration from the charity during the year.

No trustees have received any reimbursed expenses or any other benefits from the charity during the year.

8 Staff costs

The aggregate payroll costs were as follows:

	2022 £	2021 £
Staff costs during the year were:		
Wages and salaries	366,403	311,548
Social security costs	30,987	23,109
Pension costs	6,423	5,228
	403,813	339,885

The monthly average number of persons (including senior management team) employed by the charity during the year expressed as full time equivalents was as follows:

	2022 No	2021 No
Assessment services	12	12

No employee received emoluments of more than £60,000 during the year

9 Taxation

The charity is a registered charity and is therefore exempt from taxation.

10 Tangible fixed assets

	Furniture and equipment £	Motor vehicles £	Total £
Cost			
At 1 April 2021	224,825	200,187	425,012
Additions	6,362	27,788	34,150
Disposals	-	(42,047)	(42,047)
At 31 March 2022	231,187	185,928	417,115
Depreciation			
At 1 April 2021	200,135	127,940	328,075
Charge for the year	5,821	15,843	21,664
Eliminated on disposals	-	(30,480)	(30,480)
At 31 March 2022	205,956	113,303	319,259
Net book value			
At 31 March 2022	25,231	72,625	97,856
At 31 March 2021	24,690	72,247	96,937

11 Debtors

	2022 £	2021 £
Prepayments	15,713	14,844
Other debtors	-	4,624
	15,713	19,468

12 Creditors: amounts falling due within one year

	2022 £	2021 £
Accruals	2,394	2,220

13 Funds

	Balance at 1 April 2021 £	Incoming resources £	Resources expended £	Balance at 31 March 2022 £
Unrestricted funds				
General				
General fund	261,552	155,173	(216,900)	199,825
Restricted funds				
Welsh Government: Section 64	-	265,000	(265,000)	-
Chester	-	74,532	(74,532)	-
Total restricted funds	-	339,532	(339,532)	-
Total funds	261,552	494,705	(556,432)	199,825

	Balance at 1 April 2020 £	Incoming resources £	Resources expended £	Balance at 31 March 2021 £
Unrestricted funds				
General				
General fund	262,590	157,498	(158,536)	261,552
Restricted funds				
Welsh Government: Section 64	-	265,000	(265,000)	-
Chester	-	48,312	(48,312)	-
Total restricted funds	-	313,312	(313,312)	-
Total funds	262,590	470,810	(471,848)	261,552

14 Analysis of net assets between funds

	Unrestricted funds General £	Total funds £
Tangible fixed assets	97,856	97,856
Current assets	104,363	104,363
Current liabilities	(2,394)	(2,394)
Total net assets	199,825	199,825

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Signature 1

Signed by John Carter using authentication code TzIqRVwlOFY1UyxF at IP address 82.16.173.90, on 2022/08/15 16:55:40 Z.

John Carter's e-mail address is: j.carter12@ntlworld.com.

Signature 2

Signed by Mary Stevenson using authentication code bTJMd3RjcTQmXj9r at IP address 86.176.119.5, on 2022/08/22 08:36:16 Z.

Mary Stevenson's e-mail address is: mdrakelee@aol.com.

One happy client who is now independently mobile

Jeff, Dave, Julie, Dean, Cardiff Assessors viewing adaptations from BAS

WALES MOBILITY DRIVING ASSESSMENT SERVICE

England & Wales - Charity number 1056588

Accounts

Charity registration number: 1056588

Wales Mobility Driving Assessment Service

Annual Report and Financial Statements

for the Year Ended 31 March 2021

HSJ Accountants Limited
Severn House
Hazell Drive
Newport
NP10 8FY

Wales Mobility Driving Assessment Service

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Wales Mobility Driving Assessment Service

Trustees' Report

The Trustees present their report and financial statements of the charity for the year ended 31st March 2021

Structure, Governance and Management

The Wales Mobility & Driving Assessment Service (WMDAS) is located in South Wales at Rookwood Hospital, Llandaff, Cardiff and in North Wales at the Disability Resource Centre, Ysbyty Glan Clywd, Bodelwyddan, Denbighshire. Satellite services are operated in Mid Wales based at Montgomery Hospital, Newtown and West Wales in South Pembrokeshire Community Hospital. Many people from the borders of England and Wales have traditionally been referred to the North Wales service because of geographical proximity. The North Wales Manager, Gary Jones, supported by Driving Mobility and financed by the Department for Transport (DfT) in England, developed and established a new centre in Chester to undertake assessments for the ever-increasing number of referrals from this area. In Chester, the DfT pays an amount to meet the near actual cost for each assessment in keeping with their policy for all other English centres. DfT also fully funded the setting up costs and other WMDAS resource costs needed to establish the Chester service

The WMDAS is a registered Charity No. 1056588 set up under a trust deed. The service is funded by a Welsh Government Grant under section 64 of the Health Services and Public Health Act 1968. However, as from April 2016, the format of the grant was changed from ongoing 'core' funding to 3 year 'project' funding that requires a fresh re-submission every three years as well as detailed interim reports on a half yearly basis. This funding is allocated on a yearly basis subject to the terms and conditions set by the Welsh Government (WG), one of which is attaining the targets that have been set year on year and includes a 5% reduction of grant funding year on year. Re-application for the grant is in competition with other charities in Wales. This format of funding makes the future of the charity less secure and will require alternative streams of funding, at best to supplement, and at worst to replace, this source of funding. The grant is for *all* Wales and the Director who is based at the South Wales Centre manages the budget for both Centres.

The South Wales Centre operates under a Service Level Agreement with Rookwood Hospital where accommodation and utilities are provided free of charge in exchange for the services of centre staff in helping with the assessment and rehabilitation of inpatients and providing teaching to staff. The entire in-patient hospital is due to move to Llandough Hospital in 2021/22 but new premises for the WMDAS have been guaranteed on the NHS retained part of the Rookwood site though in a different building. The North Wales centre, located in The Disability Resource Centre, pays an annual rent which includes their utilities. Both centres pay their own Telecom and other costs. Both the DVLA and Motability pay the cost for any referrals they make to either centre. In all other cases, clients are self-referring and pay a set fee towards the cost of the assessment.

The service offers both driver and passenger assessments to provide the client with a long-term mobility solution. The driving assessment is not a driving test. The aim of the assessment is to evaluate the current physical and cognitive ability of the individual to drive a motor vehicle in safety and comfort at the time of the assessment. Clients are sometimes assessed on a static assessment rig (SAR) for their reaction times, steering strengths and to determine what adaptations (if any) are required. Clients are then assessed in a vehicle with adaptations where necessary in off-road and on-road situations. A report and relevant leaflets and information are sent to the client within 10 days of the assessment.

Passenger assessments are undertaken for clients who experience difficulties with access to and from a vehicle. The centres have a wide range of equipment that may reduce or eliminate the physical effort involved during transfers.

The centres also provide a free information and advice service and can advise on a range of issues including DVLA, legislation, Motability schemes, driver tuition, vehicle adaptation firms, insurance companies, and much more. A WMDAS website provides access to booking and paying for assessments online.

Wales Mobility Driving Assessment Service

Trustees' Report

Objectives

To provide a high-quality mobility and driving assessment service, conveniently accessible to all communities and equipped to meet the present and future needs of elderly and disabled people living throughout Wales by enabling them to resume or remain independently mobile.

Trustees and organisational structure

The Wales Mobility & Driving Assessment Service has an Executive Committee of 7 members who meet quarterly or sooner if needed and are responsible for the strategic direction and policy of the charity. The Committee is comprised of members from a variety of backgrounds relevant to the work of the charity.

Communication between Centres. The geographical challenges of North and South Wales make road connections long and difficult and this had resulted in a degree of isolation of the centres. Over the past two years, we have managed to strengthen the links by several means. As it is now easy and cheap to travel by plane between Cardiff and Anglesey for a day visit, staff have been able to meet up and share practice on the ground, including shadowing. Due to lockdown Virtual Zoom and Teams have become the usual way to keep in touch and hold Trustee, Staff and Management meetings. This method has proved very beneficial and will form part of the future. Trustees, who are mostly based in South Wales, have also been able to visit North Wales and we now have one Trustee from North Wales, who has attended meetings in South Wales and can attend via telecommunications when travel is not possible. Furthermore, the Minutes of the Trustees' meetings are circulated to the North Wales Advisory committee, the North Wales Manager and North Wales staff**.** Centre Managers are present at Trustee meetings.

Funding the Service. The funding for the Charity is from the Welsh Government under section 64 and the grant is paid to the South Wales centre and the Director has the responsibility for the budget of the service in all Wales, implementing policies and procedures and organising Health & Safety, Manual Handling and First Aid courses for the staff. Centre Managers in North and South Wales are responsible for the day to day running of the centres and individual supervision of the staff team and ensuring the team continue to develop their skills and working practices.

Since the inception of the 3 year "project" format for WG funding the service has had to deal with an ever-changing set of WG officials. The ongoing 'churn' of officials has inevitably meant that contacts between the service and WG are mainly grant process driven rather than meaningful and constructive dialogue on the performance and future development of the service. WG are aware of our concerns, and meetings have been arranged with Ministers to highlight the concern prior to pandemic restrictions.

Links with Driving Mobility. Both centres are affiliated to and accredited by Driving Mobility (DM) and work in compliance with DM Governing Documents, as well as the grant requirements stipulated by the Welsh Government and the Charity Commission. The interlinks between the two centres and Driving Mobility (DM) have also become stronger. DM is the umbrella organisation for DfT to manage policy making for the UK centres and has also been proactive in making assessment results across the centres transparent and are continually working with centres towards better standardisation and comparable outcomes.

Increased complexity of rules and regulations: There has been increased demands for complex databases and explicit written policies and procedures for evolving aspects of the law from various departments of WG, the bank and the Charity Commission as well as the existing ones for audit from DM and Dft. These cover Privacy Policies and cyber security This has put further time demands on the managers and the Director.

Risk Management

The Board of Trustees has conducted a review of the major risks to which the charity is exposed and where appropriate, systems and procedures have been established to mitigate the risks the charity faces.

Wales Mobility Driving Assessment Service

Trustees' Report

(1). Age of Trustees: Many of the Trustees are long serving and there was a lack of new potential Trustees seeking election over a number of years. We are now fortunate to have elected new Trustees who have different backgrounds and skills to inform our considerations and are seeking to appointment a further two Trustees.

(2). Age of South Wales staff: The mean age of the staff in the Driving Assessment Centre in South Wales was at or above retirement age and has been ameliorated. Two staff members retired and following the employment of new staff across the service the staffing is now more representative of the working age population.

Achievements and Performance

1. *Main Service Provision and Activity.*
2. *Awareness Training and Teaching:* There were no training or teaching courses undertaken during 2020/2021 because of Coronavirus lockdown restrictions.

Coronavirus resulted in the centres' closure for 7 months during 2020/21. This affected the number of assessments that could be produced therefore targets understandably were not met.

STATISTICS: The overall numbers of clients assessed between 1st April 2020 and 30th March 2021 were.

South/West Wales 237 (615- 2019/20) (583 -2018/19) (565-2017/18)

North/Mid Wales 91 (290- 2019/20) (232 -2018/19) (310 in 2017/18)

Chester 44 (159- 2019/20) (152 -2018/19) (108 in 2017/18)

Total 372 (1064 2019/20) (967 -2018/19) (983 in 2017/18)

Of these, 11 were Review Driving Assessments and 36 were passenger assessments.

Referral sources were: self-referrals 136; DVLA104; Motability Map 59; NHS/ Health professionals 23; Social Services 10;

Customer Satisfaction Survey This year's Survey again shows WMDAS is fulfilling the expectations and needs of clients (with 98% of respondents marking satisfied and very satisfied with the service)

To ensure a representative view of service users, irrespective of the outcome of their assessment, a Customer Satisfaction Survey was sent to all clients who had attended between April 2020 to March 2021. However, in cases that had potential to cause distress to the client or client families, a decision was made to withdraw these

individuals from circulation of this survey. This refers to clients who have attended for assessment and who have no insight into their deficits caused by cognitive decline. It also refers to clients who have attended but have passed away. Clients who returned for review are not routinely sent a CSS as some attend at 6 monthly intervals. NW includes outcomes for Mid and North Wales, South Wales includes West Wales outcome.

The full set of data gathered during 2020/21 can be viewed on request. A summary of the data is contained in the Director of Services report.

(b) Chester Drivability

Gary Jones has successfully set up a thriving new driving assessment centre in Chester which has gone from strength to strength to meet an expanding demand that hitherto has been directed to the North Wales centre. Chester Drivability went live in April 2017, has a growing waiting list and assessments demands are likely to continue to grow year on year. The ongoing assessment demand growth will continue to be monitored by the Director and Trustees. WMDAS in partnership with DM and DfT will continue to identify and implement appropriate solutions to meet the operational and management needs of Chester as the service expands.

(c) *Adapted – Vehicle Driver Training Service*

The driver training service has been expanded to service clients with mobility problems. **56** clients received this service with **431** hours of driver training in a range of adapted vehicles during 2020/21. This service has proved extremely popular and has provided a lifeline to those with disabilities as prior to WMDAS developing this service, there were almost no driving schools with the expertise or adapted cars to accommodate those who are unable or unsafe to drive in the conventional manner. This useful service is also a revenue raising activity for WMDAS.

(d) *Older Driver Development Programme*

The service developed with Denbighshire County Council and neighbouring counties was suspended in 2020/21 because of Covid and Government restrictions

(e) Older Driver Fitness to Drive pilot scheme.

This initiative is a joint WMDAS / Dyfed Police project that aims to assess fitness to drive in older drivers who have been reported for committing a road traffic offence. In 2020/21 The Older Driver Fitness to Drive scheme was suspended because of Coronavirus. However, during this period WMDAS has been approached by South Wales Police who wish to enter the same scheme during 2021 once lockdown restrictions allow.

(e) Welsh Rugby Union Charitable Fund. Links have been made between the South Wales Centre and the WRU Charitable Fund who now refer their clients to the centre for specialist help with mobility and driving needs.

(a) *Open Days* - Not organised due to Government Restrictions

(b) *Clinical staff training*.

.

In South Wales, nurses, doctors, physiotherapists, occupational therapists (OTs), psychologists and medical advisors from the DVLA have had one-to-one observation and/or received talks on 15 separate days. In North Wales staff gave presentations to neuromuscular centres, OTs, GP surgeries, and clinical staff at various hospitals and centres. Unfortunately, due to Government restrictions there were no events during 2020/21.

(c) *Awareness training for other individuals and organisations.* These take the form of presentations and demonstrations and are given to Memory and Stroke services; support workers; OTs working in the community and Accredited Driving Instructors but again due to lockdown no events were organised in 2020/21

(d) *Contribution to formal education courses in assessing driving mobility*.

Gary Jones, North Wales Manager, continues to be significantly involved in the DM Education Modules in partnership with the University of Chester as an Associate Tutor and has taken part in numerous meetings via Teams with University Management staff.

Gary Jones has also been instrumental in the setting up of a new educational course at Oxford Brookes University which will replace studying at Chester University and continued his role as an Associate Tutor for Driving Mobility.

Continuing Professional Development

2 members of staff enrolled on the Post Graduate Diploma Chester University course. 2 other members of staff who are already enrolled on the course planned to achieve their Diplomas in 2021 but this has been deferred until 2022 due to Covid 19. 1 staff member attended Bond Salon report writing training and another attained level 2 in T2 Business Administration and enrolled on Chwarae Tag Agile Nation 2 – Institute of Leadership and Management.

Vehicle and Office Equipment Renewal.

Following reaccreditation in 2017, office and assessment equipment and vehicles have been updated and maintained in accordance with criteria set by Driving Mobility to maintain accreditation status. The centres in Newtown and Pembroke Dock gained accreditation in 2019 with the centres at Cardiff due an inspection in 2020.The accreditation visit planned for 2020 was cancelled due to travelling restrictions and staff being furloughed but has been rescheduled for May 2021.

Due to staff having to work from home during this period, IT solutions were installed to allow for improved internet and telephone communication.

PPE and infection control systems were installed in accordance with Driving Mobility Standard Operational Policies. `

Financial Review

The principal funding source of the Charity remains the Welsh Government under their 'project' grant funding arrangements. Within the conditions of the grant, a 5% year on year reduction of funding was imposed by the Welsh Government over the years to 2018-19 and our 2019-20 and 2020-21 grant funding has been maintained at 2018-19 levels which represents further real term cuts. By comparison, centres in England financed by the DfT, have received an annual increase in funding over the same period. Salaries and earnings-related costs including the Government Pension Scheme introduced in January 2017 continue to represent the largest element of expenditure, details of which can be found in the Statement of Financial Activities.

The pressures on our financial stability and future sustainability as a consequence of the Welsh Government's grant funding regime arrangements have increased year by year and show no signs of abating. The NHS referral pathway remains closed and all clients continue to pay for their assessments apart from those who are in-patients at Rookwood Hospital. Clients are given the option of referral through Motability or DVLA if they feel unable to afford the cost of the assessment. The level of the Charity's assessment fee has been kept under critical review and was raised to £120 in April 2020. Even at this fee level, clients only meet a proportion of the real cost of an assessment which in 2018-19 was estimated to be well over £500. There will be ongoing pressures on both expenditure and income over future years as the demand for services continues to grow while the capacity for us to respond effectively to meet this growing demand remains constrained by our income position. The Director and Trustees will continue to monitor our income and expenditure across the range of our organisation's activities. Proposals for any new activity will need to be considered against our other service delivery priorities and also demonstrate that they are cost effective and affordable.

Covid and the Welsh Government responses have greatly impacted our 2020-21 financial position both in terms of the reduction in income with assessment numbers and the associated fees they generate down significantly and the additional costs incurred in meeting the Welsh Government requirements to ensure that our Centres are Covid safe for both staff and clients. The UK Government's furlough scheme arrangements have been a crucial financial lifeline for our organisation during 2020-21. For 2021-22 and beyond it is impossible to predict with any certainty what impacts Covid and the Welsh and UK Governments responses may have on our organisation. We can only respond in a considered and flexible way as issues emerge.

All the Welsh Government funding was used as agreed and budgeted as detailed in the Business Plan with some adjustments to meet unplanned for Covid costs.

The opening balance in the current account on April 1st, 2020 was £36,643.95 and the closing balance on March 31st 2021 was £20,711.

Reserves policy

It is the general policy of the charity to work towards accumulating unrestricted funds not committed or invested in tangible fixed assets representing between three and six months of expenditure. At this level the Trustees consider that sufficient unrestricted reserves would be in place to cope with planned or emergency replacement of capital equipment, and the activities of the charity could continue in the event of a sudden drop in funding and/or increase in expenditure. At the end of March 2021, the Charity's unrestricted reserves stood at some £125,811 This represents an increase of £20,000 in our unrestricted reserves since 1 April 2020. Sustaining our unrestricted reserves at over £100,000 will be extremely difficult in future years given the increasing demand pressures for our services and the need to balance our income/expenditure position to ensure the ongoing and future viability of the Charity. The Trustees will continue to monitor our unrestricted reserves position.

Plans for future periods

Subject to the current Coronavirus pandemic restrictions and when we are allowed back to work, the charity will continue its activities in the forthcoming year and plans to meet the number of assessments in line with the business plan and targets set in the Welsh Government work-plan. This will include a plan to do weekend and overtime work to reach projected targets set in the WG Workplan for 2019-20 and to further develop the adapted-vehicle driver training service.

Wales Mobility Driving Assessment Service

Trustees' Report

Reference and Administrative Details

Trustees	Dr M Stevenson Dr P McKenna Mr J Carter Ms L Harrington Mr P Brewer Ms J McKinlay Ms C S Sowden-Taylor Mr G Starkey (resigned 17 December 2020)
Secretary	Dr P McKenna
Principal Office	Rookwood Hospital Fairwater Road Llandaff Cardiff CF5 2YN
Charity Registration Number	1056588
Bankers	Lloyds Bank 514 Cowbridge Road East Victoria Park Cardiff CF5 1BL
Independent Examiner	HSJ Accountants Limited Severn House Hazell Drive Newport NP10 8FY

Wales Mobility Driving Assessment Service

Trustees' Report

Statement of Trustees' Responsibilities

The trustees are responsible for preparing the trustees' report and the financial statements in accordance with the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

The law applicable to charities requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

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

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The annual report was approved by the trustees of the charity on 10 May 2021 and signed on its behalf by:

Dr Mary Stevenson
.....
Dr M Stevenson
Chairman and Trustee

John Carter
.....
Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Independent Examiner's Report to the trustees of Wales Mobility Driving Assessment Service

I report to the charity trustees on my examination of the accounts of the charity for the year ended 31 March 2021 which are set out on pages 10 to 17.

Respective responsibilities of trustees and examiner

As the charity's trustees of Wales Mobility Driving Assessment Service you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Wales Mobility Driving Assessment Service's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

Since Wales Mobility Driving Assessment Service's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of FCCA DChA, which is one of the listed bodies.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of Wales Mobility Driving Assessment Service as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

.....

Andrew Hill
FCCA DChA

Severn House
Hazell Drive
Newport
NP10 8FY

Date: 09/06/2021

Wales Mobility Driving Assessment Service

Statement of Financial Activities for the Year Ended 31 March 2021

	Note	Unrestricted funds £	Restricted funds £	Total 2021 £
Income and Endowments from:				
Donations and legacies		7,100	-	7,100
Charitable activities		150,398	313,312	463,710
Total income		157,498	313,312	470,810
Expenditure on:				
Charitable activities		(158,536)	(313,312)	(471,848)
Total expenditure		(158,536)	(313,312)	(471,848)
Net movement in funds		(1,038)	-	(1,038)
Reconciliation of funds				
Total funds brought forward		262,590	-	262,590
Total funds carried forward	13	261,552	-	261,552

	Note	Unrestricted funds £	Restricted funds £	Total 2020 £
Income and Endowments from:				
Donations and legacies		7,812	-	7,812
Charitable activities		125,503	345,435	470,938
Investment income	4	319	-	319
Total income		133,634	345,435	479,069
Expenditure on:				
Charitable activities		(171,071)	(345,435)	(516,506)
Total expenditure		(171,071)	(345,435)	(516,506)
Net movement in funds		(37,437)	-	(37,437)
Reconciliation of funds				
Total funds brought forward		300,027	-	300,027
Total funds carried forward	13	262,590	-	262,590

All of the charity's activities derive from continuing operations during the above two periods.

The funds breakdown for 2020 is shown in note 13.

Wales Mobility Driving Assessment Service

(Registration number: 1056588)
Balance Sheet as at 31 March 2021

	Note	2021 £	2020 £
Fixed assets			
Tangible assets	10	96,937	106,411
Current assets			
Debtors	11	19,468	15,908
Cash at bank and in hand		147,367	142,430
		166,835	158,338
Creditors: Amounts falling due within one year	12	(2,220)	(2,159)
Net current assets		164,615	156,179
Net assets		261,552	262,590
Funds of the charity:			
Unrestricted income funds			
Unrestricted funds		261,552	262,590
Total funds	13	261,552	262,590

The financial statements on pages 10 to 17 were approved by the trustees, and authorised for issue on 10 May 2021 and signed on their behalf by:

Dr Mary Stevenson
.....
Dr M Stevenson
Chairman and Trustee

John Carter
.....
Mr J Carter
Trustee

Wales Mobility Driving Assessment Service

Notes to the Financial Statements for the Year Ended 31 March 2021

1 Accounting policies

Exemption from preparing a cash flow statement
The charity opted to early adopt Bulletin 1 published on 2 February 2016 and have therefore not included a cash flow statement in these financial statements.

Income and endowments

Donations and legacies

Donations are recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Investment income

Investment income is recogised on a receivable basis.

Charitable activities

Income from charitable activities includes income recognised as earned (as the related goods or senrices are provided) under contract or where entifiement to grant funding is subject to specific performance conditions. Grant income included in this category provides funding to support programme activities and is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Expenditure
All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category. Where costs cannot be directly attributed to particular headings they have been allocated on a basis consistent with the use of resources, with central staff costs allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use. Other support costs are allocated based on the spread of staff costs.

Charitable activities

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

Support costs
Support costs include central functions and have been allocated to activity cost categories on a basis consistent with the use of resources, for example, allocating property costs by floor areas, or per capita, staff costs by the time spent and other costs by their usage.

Governance costs
These include the costs attributable to the charity's compliance with constitutional and statutory requirements, including audit, strategic management and trustees's meetings and reimbursed expenses.

Taxation
The charity is considered to pass the tests set out in Paragraph 1 Schedule 6 of the Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes. Accordingly, the charity is potentially exempt from taxation in respect of income or capital gains received within categories covered by Chapter 3 Part 11 of the Corporation Tax Act 2010 or Section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

Tangible fixed assets
Individual fixed assets costing £1,000.00 or more are initially recorded at cost.

Depreciation and amortisation
Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

Asset class	Depreciation method and rate
Fixtures & fittings	20% on reducing balance
Motor vehicles	25% on reducing balance
Computer equipment	25% on reducing balance

Cash and cash equivalents
Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

Fund structure
Unrestricted income funds are general funds that are available for use at the trustees's discretion in furtherance of the objectives of the charity.

Restricted income funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

2 Income from donations and legacies

	Unrestricted funds		
	General £	Total 2021 £	Total 2020 £
Donations and legacies;			
Donated assets and services	6,500	6,500	6,712
Donations from individuals	600	600	1,100
	7,100	7,100	7,812

3 Income from charitable activities

	Unrestricted funds General £	Restricted funds £	Total 2021 £	Total 2020 £
Assessment fees - Wales	57,431	-	57,431	122,037
Assessment fees - Chester	-	48,312	48,312	79,980
Welsh Government	-	265,000	265,000	265,455
Lessons	11,158	-	11,158	3,466
Covid-19 Support - CJRS	81,809	-	81,809	-
	150,398	313,312	463,710	470,938

4 Investment income

	Total 2021 £	Total 2020 £
Interest receivable and similar income;		
Interest receivable on bank deposits	-	319

5 Expenditure on charitable activities

	Note	Unrestricted funds General £	Restricted funds £	Total 2021 £	Total 2020 £
Assessment and advice services		126,739	2,748	129,487	146,339
Staff costs		29,321	310,564	339,885	364,686
Governance costs		2,476	-	2,476	5,481
		158,536	313,312	471,848	516,506

6 Analysis of governance and support costs

Support costs allocated to charitable activities

	Basis of allocation	Staff costs £	Administration costs £	Premises costs including depreciation £	Total 2021 £	Total 2020 £
Assessment and advice services	A	61,180	11,000	4,000	76,180	76,180

Basis of allocation

Reference	Method of allocation
A	Caluclated on a percentage of support time incurred

7 Trustees remuneration and expenses

No trustees, nor any persons connected with them, have received any remuneration from the charity during the year.

No trustees have received any reimbursed expenses or any other benefits from the charity during the year.

8 Staff costs

The aggregate payroll costs were as follows:

	2021 £	2020 £
Staff costs during the year were:		
Wages and salaries	311,548	334,301
Social security costs	23,109	23,697
Pension costs	5,228	6,688
	339,885	364,686

The monthly average number of persons (including senior management team) employed by the charity during the year expressed as full time equivalents was as follows:

	2021 No	2020 No
Assessment services	12	10

No employee received emoluments of more than £60,000 during the year

9 Taxation

The charity is a registered charity and is therefore exempt from taxation.

10 Tangible fixed assets

	Furniture and equipment £	Motor vehicles £	Total £
Cost			
At 1 April 2020	215,433	201,737	417,170
Additions	9,392	7,438	16,830
Disposals	-	(8,988)	(8,988)
At 31 March 2021	224,825	200,187	425,012
Depreciation			
At 1 April 2020	195,202	115,557	310,759
Charge for the year	4,933	18,203	23,136
Eliminated on disposals	-	(5,820)	(5,820)
At 31 March 2021	200,135	127,940	328,075
Net book value			
At 31 March 2021	24,690	72,247	96,937
At 31 March 2020	20,231	86,180	106,411

11 Debtors

	2021 £	2020 £
Prepayments	14,844	15,908
Other debtors	4,624	-
	19,468	15,908

12 Creditors: amounts falling due within one year

	2021 £	2020 £
Accruals	2,220	2,159

13 Funds

	Balance at 1 April 2020 £	Incoming resources £	Resources expended £	Balance at 31 March 2021 £
Unrestricted funds				
General				
General fund	262,590	157,498	(158,536)	261,552
Restricted funds				
Welsh Government: Section 64	-	265,000	(265,000)	-
Chester	-	48,312	(48,312)	-
Total restricted funds	-	313,312	(313,312)	-
Total funds	262,590	470,810	(471,848)	261,552

	Balance at 1 April 2019 £	Incoming resources £	Resources expended £	Balance at 31 March 2020 £
Unrestricted funds				
General				
General fund	300,027	133,634	(171,071)	262,590
Restricted funds				
Welsh Government: Section 64	-	265,455	(265,455)	-
Chester	-	79,980	(79,980)	-
Total restricted funds	-	345,435	(345,435)	-
Total funds	300,027	479,069	(516,506)	262,590

14 Analysis of net assets between funds

	Unrestricted funds General £	Total funds £
Tangible fixed assets	96,937	96,937
Current assets	166,835	166,835
Current liabilities	(2,220)	(2,220)
Total net assets	261,552	261,552