

**REGISTERED COMPANY NUMBER: 03388017 (England and Wales)**  
**REGISTERED CHARITY NUMBER: 1070038**

**SWINDON ADVOCACY MOVEMENT**

**UNAUDITED FINANCIAL STATEMENTS  
FOR THE YEAR ENDED  
31 MARCH 2021**

**SWINDON ADVOCACY MOVEMENT**  
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**FOR THE YEAR ENDED 31 MARCH 2021**

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**SWINDON ADVOCACY MOVEMENT**  
**REPORT OF THE TRUSTEES**  
**FOR THE YEAR ENDED 31 MARCH 2021**

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The trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the year ended 31 March 2021. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

**OBJECTIVES AND ACTIVITIES**

**Objectives and aims**

The charity's objective and principle activity is the provision of an independent accessible advocacy service to protect and empower people with care and support needs in the Swindon area.

**Public benefit**

The trustees have paid due regard to the guidance contained in the Charity Commission's general guidance on public benefit when deciding what activities the charity should undertake. It is the view of the trustees that the activities summarised in this report demonstrate the commitment of the charity to provide an identifiable benefit that applies to a section of the public.

**STRATEGIC REPORT**

**Achievement and performance**

**Charitable activities**

Swindon Advocacy Movement is proud that during this challenging year of 2020/21 our advocacy team continued to provide all contracted advocacy services and gave a voice to 809 children, young people and adults with care and support needs.

In addition to this, in the early weeks of the lockdown we searched through our database from the past 2 years and contacted 104 people who we knew would be very vulnerable: people with Autism, mental health concerns, learning disabilities or parents with learning disabilities. living independently in the community with little or no support.

We increased our number of trained advocates across all statutory specialist services giving us the capacity to offer interface specialisms across the Mental Capacity Act, The Care Act, and the Mental Health Act. We now have 9 fully trained advocates which includes 5 qualified Care Act advocates, 5 Independent Mental Capacity Advocates and 4 Independent Mental Health Advocates with 6 people holding City & Guilds level 4 Diplomas in Independent Advocacy.

Our new website went live in July [www.swindonadvocacy.org.uk](http://www.swindonadvocacy.org.uk) which will make our service more accessible to clients and professionals.

**SWINDON ADVOCACY MOVEMENT**  
**REPORT OF THE TRUSTEES**  
**FOR THE YEAR ENDED 31 MARCH 2021**

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**STRATEGIC REPORT**

**Achievement and performance**

**Working under COVID 19**

The sudden impact of the pandemic left many of our clients isolated and vulnerable. Many of them live independently in the community with little or no support and most had no access to the internet. Some people had no means of keeping up to date with the changing, frightening situation and had no means of getting vital support they needed. In response to this we:

- Signposted 137 people to food deliveries via the Live Well hub and other services.
- Enabled 89 people to get the medication they needed.
- Gave regular emotional support to 548 people.
- Signposted 194 to statutory health and social care services.
- Made 4030 phone calls to enable individuals to access support.
- Made regular wellbeing phone calls and delivered bespoke activity packs to 70 people with learning disabilities.

**Challenges met during the pandemic**

The team met the challenge of an increase in demand for the service and an intensity of work as many individuals in the community faced isolation and crisis. They worked tirelessly and with commitment to ensure that the wellbeing of all our clients was protected. At the same time the advocates found creative ways to support individuals and understand their needs and wishes whilst not being able to meet face to face. Working within the national guidelines and to our risk assessments, they contacted people by phone, talked online, met people in gardens or parks and met people face to face in building based environments in safeguarding or crisis situations.

Referrals for adults being detained under the Mental Health Act increased by 36%.

We worked hard to support our staff team with flexible working arrangements and learnt how to use Teams quickly so we could all stay in touch and work productively.

**Financial review**

**Financial position**

For the year ending 31st March 2021 the charity generated a surplus as shown on page 4. This is a result of Covid emergency grant funding, some of which will continue to support our work into next year. We are grateful to Zurich Community Trust, Lloyds Bank Foundation, The Big Lottery and Wiltshire Community Foundation who provided valuable funds to enable us to respond to meet our clients' needs while the charity was under significant pressure to respond to unprecedented demand. The pandemic stopped us from community fundraising and limited the income we could raise through our spot purchase advocacy work.

**Principal funding sources**

The charity's principle funding source is the Local Authority with additional funding raised from independent grant funders.

**Reserves policy**

The Trustees always work on the principle of having 3 months running costs in reserves.

**Future plans**

The COVID-19 pandemic has demonstrated the value of digital access and SAM will further develop our Digital Inclusion to support our clients.

We will continue to invest in our staff and will hold a salary review to give a sustainable increase where appropriate and set up a mechanism for future reviews. We will also look at improving our systems with new database and reporting tools.

We will also develop our spot purchase Advocacy offering.

**SWINDON ADVOCACY MOVEMENT**  
**REPORT OF THE TRUSTEES**  
**FOR THE YEAR ENDED 31 MARCH 2021**

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**STRUCTURE, GOVERNANCE AND MANAGEMENT**

**Governing document**

The charity is controlled by its governing document, a deed of trust, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

**Recruitment and appointment of new trustees**

The appointment of trustees is governed by the Articles of Association.

We actively recruit for a broad range of life experience and skills on the board. As a user led charity, we encourage service users to participate in its development by attending one or more Management Committee meetings and then explore with them the option to serve as a trustee. Any appointment is subject to ratification at the next Annual General Meeting.

All new trustees receive a full induction in to the organisation which includes prior access to financial accounts and governing documents.

**Organisational structure**

The Management committee oversees the work of the charity.

**REFERENCE AND ADMINISTRATIVE DETAILS**

**Registered Company number**

03388017 (England and Wales)

**Registered Charity number**

1070038

**Registered office**

Sanford House  
Sanford Street  
SWINDON  
Wiltshire  
SN1 1HE

**Trustees**

Ms T N Peapell (resigned 9.12.20)  
Ms A Cooper  
Mr G Bawden  
Mr A B Dixon  
Ms J Weston  
Mr B Mitchell (resigned 9.12.20)  
Ms T Hardman  
Mr R James

**Company Secretary**

Ms A Cooper

**Independent Examiner**

Morris Owen  
Chartered Accountants  
43-45 Devizes Road  
SWINDON  
Wiltshire  
SN1 4BG

**SWINDON ADVOCACY MOVEMENT**  
**REPORT OF THE TRUSTEES**  
**FOR THE YEAR ENDED 31 MARCH 2021**

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**REFERENCE AND ADMINISTRATIVE DETAILS**

**Bankers**

HSBC Bank Plc  
Unit 6 The Lock  
Canal Walk  
SWINDON  
Wiltshire  
SN1 1LD

Report of the trustees, incorporating a strategic report, approved by order of the board of trustees, as the company directors, on 11 October 2021 and signed on the board's behalf by:



Ms J Weston - Trustee

## INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF SWINDON ADVOCACY MOVEMENT

### Independent examiner's report to the trustees of Swindon Advocacy Movement ('the Company')

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 March 2021.

### Responsibilities and basis of report

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

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

### Independent examiner's statement

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body. I can confirm that I am qualified to undertake the examination because I am a registered member of Association of Chartered Certified Accountants which is one of the listed bodies.

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

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities (applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)).

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.

1. *Sumbler*

Mr Ian Sumbler FCCA  
Morris Owen  
Chartered Accountants  
43-45 Devizes Road  
SWINDON  
Wiltshire  
SN1 4BG

Date: ..... 12.10.2021 .....

**SWINDON ADVOCACY MOVEMENT**  
**STATEMENT OF FINANCIAL ACTIVITIES**  
**FOR THE YEAR ENDED 31 MARCH 2021**

	Notes	Unrestricted funds £	Restricted funds £	2021 Total funds £	2020 Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>					
Donations and legacies	3	2,202	-	2,202	6,850
<b>Charitable activities</b>	6				
Charitable activities		20,001	519,276	539,277	468,237
Fund generating activities	4	10,657	9,075	19,732	16,150
Investment income	5	13	-	13	59
<b>Total</b>		<b>32,873</b>	<b>528,351</b>	<b>561,224</b>	491,296
<b>EXPENDITURE ON</b>					
<b>Charitable activities</b>	7				
Charitable activities		13,236	509,925	523,161	519,147
Other		-	-	-	6,046
<b>Total</b>		<b>13,236</b>	<b>509,925</b>	<b>523,161</b>	525,193
<b>NET INCOME/(EXPENDITURE)</b>		<b>19,637</b>	<b>18,426</b>	<b>38,063</b>	(33,897)
<b>RECONCILIATION OF FUNDS</b>					
<b>Total funds brought forward</b>		<b>125,555</b>	<b>22,875</b>	<b>148,430</b>	182,327
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>145,192</b>	<b>41,301</b>	<b>186,493</b>	148,430

The notes form part of these financial statements

**SWINDON ADVOCACY MOVEMENT**  
**STATEMENT OF FINANCIAL POSITION**  
**31 MARCH 2021**

	Notes	Unrestricted funds £	Restricted funds £	2021 Total funds £	2020 Total funds £
<b>CURRENT ASSETS</b>					
Debtors	13	9,427	434	9,861	105,895
Cash at bank		147,363	166,541	313,904	208,092
		<u>156,790</u>	<u>166,975</u>	<u>323,765</u>	<u>313,987</u>
<b>CREDITORS</b>					
Amounts falling due within one year	14	(11,601)	(125,671)	(137,272)	(165,557)
		<u>145,189</u>	<u>41,304</u>	<u>186,493</u>	<u>148,430</u>
<b>NET CURRENT ASSETS</b>					
		<u>145,189</u>	<u>41,304</u>	<u>186,493</u>	<u>148,430</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>					
		<u>145,189</u>	<u>41,304</u>	<u>186,493</u>	<u>148,430</u>
<b>NET ASSETS</b>					
		<u>145,189</u>	<u>41,304</u>	<u>186,493</u>	<u>148,430</u>
<b>FUNDS</b>	15				
Unrestricted funds				145,189	125,555
Restricted funds				41,304	22,875
<b>TOTAL FUNDS</b>				<u>186,493</u>	<u>148,430</u>

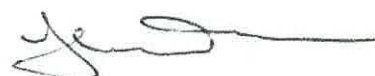
The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 March 2021.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 March 2021 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for

- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

The financial statements were approved by the Board of Trustees and authorised for issue on 11 October 2021 and were signed on its behalf by:



Ms J Weston - Trustee

The notes form part of these financial statements

**SWINDON ADVOCACY MOVEMENT**  
**STATEMENT OF CASH FLOWS**  
**FOR THE YEAR ENDED 31 MARCH 2021**

	Notes	2021 £	2020 £
<b>Cash flows from operating activities</b>			
Cash generated from operations	1	<u>105,799</u>	<u>(25,538)</u>
Net cash provided by/(used in) operating activities		<u>105,799</u>	<u>(25,538)</u>
<b>Cash flows from investing activities</b>			
Interest received		<u>13</u>	<u>59</u>
Net cash provided by investing activities		<u>13</u>	<u>59</u>
<b>Change in cash and cash equivalents in the reporting period</b>		<u>105,812</u>	<u>(25,479)</u>
<b>Cash and cash equivalents at the beginning of the reporting period</b>		<u>208,092</u>	<u>233,571</u>
<b>Cash and cash equivalents at the end of the reporting period</b>		<u>313,904</u>	<u>208,092</u>

The notes form part of these financial statements

**SWINDON ADVOCACY MOVEMENT**  
**NOTES TO THE STATEMENT OF CASH FLOWS**  
**FOR THE YEAR ENDED 31 MARCH 2021**

**1. RECONCILIATION OF NET INCOME/(EXPENDITURE) TO NET CASH FLOW FROM OPERATING ACTIVITIES**

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
<b>Net income/(expenditure) for the reporting period (as per the Statement of Financial Activities)</b>	<b>38,063</b>	<b>(33,897)</b>
<b>Adjustments for:</b>		
Interest received	<b>(13)</b>	<b>(59)</b>
Decrease/(increase) in debtors	<b>96,034</b>	<b>(17,904)</b>
(Decrease)/increase in creditors	<b>(28,285)</b>	<b>26,322</b>
<b>Net cash provided by/(used in) operations</b>	<b><u>105,799</u></b>	<b><u>(25,538)</u></b>

**2. ANALYSIS OF CHANGES IN NET FUNDS**

	<b>At 1.4.20</b>	<b>Cash flow</b>	<b>At 31.3.21</b>
	<b>£</b>	<b>£</b>	<b>£</b>
<b>Net cash</b>			
Cash at bank	<b><u>208,092</u></b>	<b><u>105,812</u></b>	<b><u>313,904</u></b>
	<b><u>208,092</u></b>	<b><u>105,812</u></b>	<b><u>313,904</u></b>
<b>Total</b>	<b><u>208,092</u></b>	<b><u>105,812</u></b>	<b><u>313,904</u></b>

The notes form part of these financial statements

**SWINDON ADVOCACY MOVEMENT**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 MARCH 2021**

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**1. COMPANY INFORMATION**

The company is a company limited by guarantee and incorporated in England and Wales, and a registered charity with the Charity Commission in England and Wales.

The registered office address is Sanford House, Sanford Street, Swindon, Wiltshire, SN1 1HE.

These financial statements are presented in British Pounds (GBP), which is the company's functional and presentational currency.

**2. ACCOUNTING POLICIES**

**Basis of preparing the financial statements**

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

**Tangible assets**

Small equipment such as laptops for projects are expended through the Statement of Financial Activities.

**Income**

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

**Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

**Taxation**

The charity is exempt from corporation tax on its charitable activities.

**Fund accounting**

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

**Pension costs and other post-retirement benefits**

The charitable company operates a defined contribution pension scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

# SWINDON ADVOCACY MOVEMENT

## NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 MARCH 2021

### 2. ACCOUNTING POLICIES - continued

#### Financial instruments

Short term debtors are measured at transaction price, less any impairment. Loans receivable are measured initially at fair value, net of transaction costs, and are measured subsequently at amortised cost using the effective interest method, less any impairment.

Short term trade creditors are measured at the transaction price. Other financial liabilities, including loans, are measured initially at fair value, net of transaction costs, and are measured subsequently at amortised cost using the effective interest method.

### 3. DONATIONS AND LEGACIES

	2021 £	2020 £
Donations	<u>2,202</u>	<u>6,850</u>

### 4. FUND GENERATING ACTIVITIES

	2021 £	2020 £
Other income	<u>19,732</u>	<u>16,150</u>

### 5. INVESTMENT INCOME

	2021 £	2020 £
Deposit account interest	<u>13</u>	<u>59</u>

### 6. INCOME FROM CHARITABLE ACTIVITIES

	Activity	2021 £	2020 £
Grants	Charitable activities	<u>539,277</u>	<u>468,237</u>

### 7. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs (see note 8) £	Totals £
Charitable activities	<u>519,238</u>	<u>3,923</u>	<u>523,161</u>

**SWINDON ADVOCACY MOVEMENT**  
**NOTES TO THE FINANCIAL STATEMENTS - continued**  
**FOR THE YEAR ENDED 31 MARCH 2021**

**8. SUPPORT COSTS**

	Finance £	Governance costs £	Totals £
Charitable activities	<u>114</u>	<u>3,809</u>	<u>3,923</u>

**9. TRUSTEES' REMUNERATION AND BENEFITS**

There was no remuneration to the trustees in 2020 or 2019.

**Trustees' expenses**

No expenses were paid to the trustees in 2020 or 2019.

**10. STAFF COSTS**

	2021 £	2020 £
Wages and salaries	438,416	404,967
Social security costs	30,804	29,454
Other pension costs	15,037	13,127
	<u>484,257</u>	<u>447,548</u>

The average monthly number of employees during the year was as follows:

	2021 22	2020 21
Staff	<u>22</u>	<u>21</u>

No employees received emoluments in excess of £60,000.

**11. INDEPENDENT EXAMINERS FEES**

	2021 £	2020 £
Statutory accounts production & external scrutiny	1,820	1,590
	<u>1,820</u>	<u>1,590</u>

**12. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES**

	Unrestricted funds £	Restricted funds £	Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>			
Donations and legacies	6,850	-	6,850
<b>Charitable activities</b>			
Charitable activities	-	468,237	468,237
Fund generating activities	13,488	2,662	16,150
Investment income	59	-	59
<b>Total</b>	<u>20,397</u>	<u>470,899</u>	<u>491,296</u>

**SWINDON ADVOCACY MOVEMENT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2021**

**12. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES - continued**

	Unrestricted funds £	Restricted funds £	Total funds £
<b>EXPENDITURE ON Charitable activities</b>			
Charitable activities	50,852	468,295	519,147
Other	150	5,896	6,046
<b>Total</b>	<b>51,002</b>	<b>474,191</b>	<b>525,193</b>
<b>NET INCOME/(EXPENDITURE)</b>	<b>(30,605)</b>	<b>(3,292)</b>	<b>(33,897)</b>
<b>Transfers between funds</b>	<b>(369)</b>	<b>369</b>	<b>-</b>
<b>Net movement in funds</b>	<b>(30,974)</b>	<b>(2,923)</b>	<b>(33,897)</b>
<b>RECONCILIATION OF FUNDS</b>			
<b>Total funds brought forward</b>	<b>156,528</b>	<b>25,799</b>	<b>182,327</b>
<b>TOTAL FUNDS CARRIED FORWARD</b>	<b>125,554</b>	<b>22,876</b>	<b>148,430</b>

**13. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	<b>2021</b> £	2020 £
Trade debtors	<b>9,339</b>	105,025
Prepayments	<b>522</b>	870
	<b>9,861</b>	<b>105,895</b>

**14. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	<b>2021</b> £	2020 £
Trade creditors	<b>1,104</b>	8,004
Social security and other taxes	<b>8,797</b>	8,738
Accrued expenses	<b>1,700</b>	1,500
Deferred income	<b>125,671</b>	147,315
	<b>137,272</b>	<b>165,557</b>

# SWINDON ADVOCACY MOVEMENT

## NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 MARCH 2021

### 15. MOVEMENT IN FUNDS

	At 1.4.20 £	Net movement in funds £	At 31.3.21 £
<b>Unrestricted funds</b>			
General fund	125,555	11,680	137,235
Zurich Community Trust Covid 19 Grant	-	7,954	7,954
	<u>125,555</u>	<u>19,634</u>	<u>145,189</u>
<b>Restricted funds</b>			
Big Lottery Fund	-	837	837
Children In Need	7,824	(131)	7,693
General Advocacy	5,210	(3,670)	1,540
Community Mental Health Advocacy	1,071	22,786	23,857
Day Opportunities	8,770	(2,605)	6,165
Wiltshire Community Foundation	-	1,212	1,212
	<u>22,875</u>	<u>18,429</u>	<u>41,304</u>
<b>TOTAL FUNDS</b>	<u>148,430</u>	<u>38,063</u>	<u>186,493</u>

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	12,872	(1,192)	11,680
Zurich Community Trust Covid 19 Grant	20,000	(12,046)	7,954
	<u>32,872</u>	<u>(13,238)</u>	<u>19,634</u>
<b>Restricted funds</b>			
Big Lottery Fund	9,833	(8,996)	837
Children In Need	16,657	(16,788)	(131)
General Advocacy	369,639	(373,309)	(3,670)
Childrens Advocacy Service	9,429	(9,429)	-
Community Mental Health Advocacy	48,670	(25,884)	22,786
Day Opportunities	47,991	(50,596)	(2,605)
Big Lottery for All - Covid Response	9,948	(9,948)	-
Wiltshire Community Foundation	6,495	(5,283)	1,212
Lloyds Covid	9,690	(9,690)	-
	<u>528,352</u>	<u>(509,923)</u>	<u>18,429</u>
<b>TOTAL FUNDS</b>	<u>561,224</u>	<u>(523,161)</u>	<u>38,063</u>

**SWINDON ADVOCACY MOVEMENT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2021**

**15. MOVEMENT IN FUNDS - continued**

**Comparatives for movement in funds**

	At 1.4.19 £	Net movement in funds £	Transfers between funds £	At 31.3.20 £
<b>Unrestricted funds</b>				
General fund	156,528	(30,604)	(369)	125,555
<b>Restricted funds</b>				
Big Lottery Fund	-	(37)	37	-
Children In Need	-	7,824	-	7,824
General Advocacy	16,581	(11,371)	-	5,210
Childrens Advocacy Service	523	(855)	332	-
Community Mental Health Advocacy	3,116	(2,045)	-	1,071
Money Matters (The MSE Charity)	5,579	(5,579)	-	-
Day Opportunities	-	8,770	-	8,770
	<u>25,799</u>	<u>(3,293)</u>	<u>369</u>	<u>22,875</u>
<b>TOTAL FUNDS</b>	<u>182,327</u>	<u>(33,897)</u>	<u>-</u>	<u>148,430</u>

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	20,397	(51,001)	(30,604)
<b>Restricted funds</b>			
Big Lottery Fund	-	(37)	(37)
Children In Need	20,664	(12,840)	7,824
General Advocacy	352,027	(363,398)	(11,371)
Non Statutory Advocacy Funding	10,001	(10,001)	-
Childrens Advocacy Service	9,429	(10,284)	(855)
Community Mental Health Advocacy	24,145	(26,190)	(2,045)
Money Matters (The MSE Charity)	14,643	(20,222)	(5,579)
Day Opportunities	39,990	(31,220)	8,770
	<u>470,899</u>	<u>(474,192)</u>	<u>(3,293)</u>
<b>TOTAL FUNDS</b>	<u>491,296</u>	<u>(525,193)</u>	<u>(33,897)</u>

**SWINDON ADVOCACY MOVEMENT**

**NOTES TO THE FINANCIAL STATEMENTS - continued  
FOR THE YEAR ENDED 31 MARCH 2021**

**15. MOVEMENT IN FUNDS - continued**

A current year 12 months and prior year 12 months combined position is as follows:

	At 1.4.19 £	Net movement in funds £	Transfers between funds £	At 31.3.21 £
<b>Unrestricted funds</b>				
General fund	156,528	(18,924)	(369)	137,235
Zurich Community Trust Covid 19 Grant	-	7,954	-	7,954
	<u>156,528</u>	<u>(10,970)</u>	<u>(369)</u>	<u>145,189</u>
<b>Restricted funds</b>				
Big Lottery Fund	-	800	37	837
Children In Need	-	7,693	-	7,693
General Advocacy	16,581	(15,041)	-	1,540
Childrens Advocacy Service	523	(855)	332	-
Community Mental Health Advocacy	3,116	20,741	-	23,857
Money Matters (The MSE Charity)	5,579	(5,579)	-	-
Day Opportunities	-	6,165	-	6,165
Wiltshire Community Foundation	-	1,212	-	1,212
	<u>25,799</u>	<u>15,136</u>	<u>369</u>	<u>41,304</u>
<b>TOTAL FUNDS</b>	<u>182,327</u>	<u>4,166</u>	<u>-</u>	<u>186,493</u>

## SWINDON ADVOCACY MOVEMENT

### NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 MARCH 2021

#### 15. MOVEMENT IN FUNDS - continued

A current year 12 months and prior year 12 months combined net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	33,269	(52,193)	(18,924)
Zurich Community Trust Covid 19 Grant	20,000	(12,046)	7,954
	<u>53,269</u>	<u>(64,239)</u>	<u>(10,970)</u>
<b>Restricted funds</b>			
Big Lottery Fund	9,833	(9,033)	800
Children In Need	37,321	(29,628)	7,693
General Advocacy	721,666	(736,707)	(15,041)
Non Statutory Advocacy Funding	10,001	(10,001)	-
Childrens Advocacy Service	18,858	(19,713)	(855)
Community Mental Health Advocacy	72,815	(52,074)	20,741
Money Matters (The MSE Charity)	14,643	(20,222)	(5,579)
Day Opportunities	87,981	(81,816)	6,165
Big Lottery for All - Covid Response	9,948	(9,948)	-
Wiltshire Community Foundation	6,495	(5,283)	1,212
Lloyds Covid	9,690	(9,690)	-
	<u>999,251</u>	<u>(984,115)</u>	<u>15,136</u>
<b>TOTAL FUNDS</b>	<u>1,052,520</u>	<u>(1,048,354)</u>	<u>4,166</u>

#### Details of Restricted Funds

##### General Advocacy

Contains the material funding by Swindon Borough Council for Statutory Advocacy under The Care Act, The Mental Capacity Act and The Mental Health Act. This also includes non-statutory advocacy for parents with learning disabilities going through Child Protection, 'Action for Independence' support for people with learning disabilities and for providing administration for the Swindon Learning Disability Partnership Board.

##### Non Statutory Advocacy

Funding provided by Henry Smith and Wiltshire Community Foundation for a crisis advocacy service for people with learning disabilities or Autism living independently in the community.

##### Children's Advocacy Service

Funding from Zurich Community Trust for an advocacy service for young people with mental health conditions.

##### Community Mental Health Advocacy

Funding from Lloyds Bank Foundation for a community mental health service for adults leaving mental health care to live independently in the community.

##### Money Matters

Funding from RBS Skills and Opportunities Fund for activities for people with learning disabilities to learn how to use and manage money.

## SWINDON ADVOCACY MOVEMENT

### NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 MARCH 2021

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#### 15. MOVEMENT IN FUNDS - continued

##### **Day Opportunities - Project Boost**

Funding from Swindon Borough Council for Day Opportunities for people with learning disabilities; enabling members to take up new work, volunteering or leisure opportunities in the community.

##### **Big Lottery 'Awards for All' - Boost Your Skills**

Funding from The Big Lottery 'Awards for All' to enable adults with learning disabilities to achieve AQA awards for independent living skills involving activities such as cooking, maintaining a habitable home, washing clothes or ironing.

##### **Transfers between funds**

Transfers are made between restricted and unrestricted funds at the end of every accounting period in cases where the restricted fund is in deficit and has either come to an end or there is no prospect of a surplus in a later period, when the deficit is eliminated by transfer from unrestricted funds.

#### 16. CONTINGENT LIABILITIES

Various funders retain the right to claw back grants should the use of the funds not be in accordance with the terms of the grant. In the opinion of the Trustees no such liability exists at the year end.

#### 17. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2021.

**SWINDON ADVOCACY MOVEMENT**  
**DETAILED STATEMENT OF FINANCIAL ACTIVITIES**  
**FOR THE YEAR ENDED 31 MARCH 2021**

	2021 £	2020 £
<b>INCOME AND ENDOWMENTS</b>		
<b>Donations and legacies</b>		
Donations	<b>2,202</b>	6,850
<b>Fund generating activities</b>		
Other income	<b>19,732</b>	16,150
<b>Investment income</b>		
Deposit account interest	<b>13</b>	59
<b>Charitable activities</b>		
Grants	<b>539,277</b>	468,237
<b>Total incoming resources</b>	<b>561,224</b>	491,296
<b>EXPENDITURE</b>		
<b>Charitable activities</b>		
Wages	<b>438,416</b>	404,967
Social security	<b>30,804</b>	29,454
Pensions	<b>15,037</b>	13,127
Rates and water	<b>288</b>	5,844
Insurance	<b>2,619</b>	2,484
Light and heat	<b>1,772</b>	2,770
Telephone	<b>8,748</b>	10,547
Postage and stationery	<b>2,926</b>	4,272
Advertising	<b>434</b>	871
Sundries	<b>938</b>	1,565
Travel	<b>713</b>	7,228
Computer costs	<b>7,276</b>	12,986
Office expenses	<b>7,105</b>	6,358
Training	<b>465</b>	7,981
Property expenses	<b>1,697</b>	8,599
	<b>519,238</b>	519,053
<b>Support costs</b>		
<b>Finance</b>		
Bank charges	<b>114</b>	94
<b>Governance costs</b>		
Accountancy fees	<b>3,164</b>	3,072
Legal fees	<b>645</b>	2,974
	<b>3,809</b>	6,046
Total resources expended	<b>523,161</b>	525,193
<b>Net income/(expenditure)</b>	<b>38,063</b>	(33,897)

This page does not form part of the statutory financial statements

Your life.  
Your choice.  
Your voice.



sam

Swindon Advocacy Movement

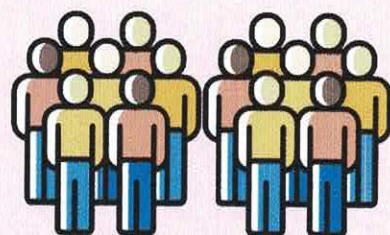
# ANNUAL REPORT 2020/21



## ACHIEVEMENT AND PERFORMANCE



Swindon Advocacy Movement is proud that during this challenging year of 2020/21 our advocacy team continued to provide all contracted advocacy services and gave a voice to



**809**

children, young people and adults with care and support needs.

In the early weeks of the lockdown we searched through our database from the past 2 years and contacted 104 people who we knew would be very vulnerable

Autism



Mental health concerns



Learning disabilities or parents with learning disabilities



104 people with



Living independently in the community with little or no support

## ACHIEVEMENT AND PERFORMANCE

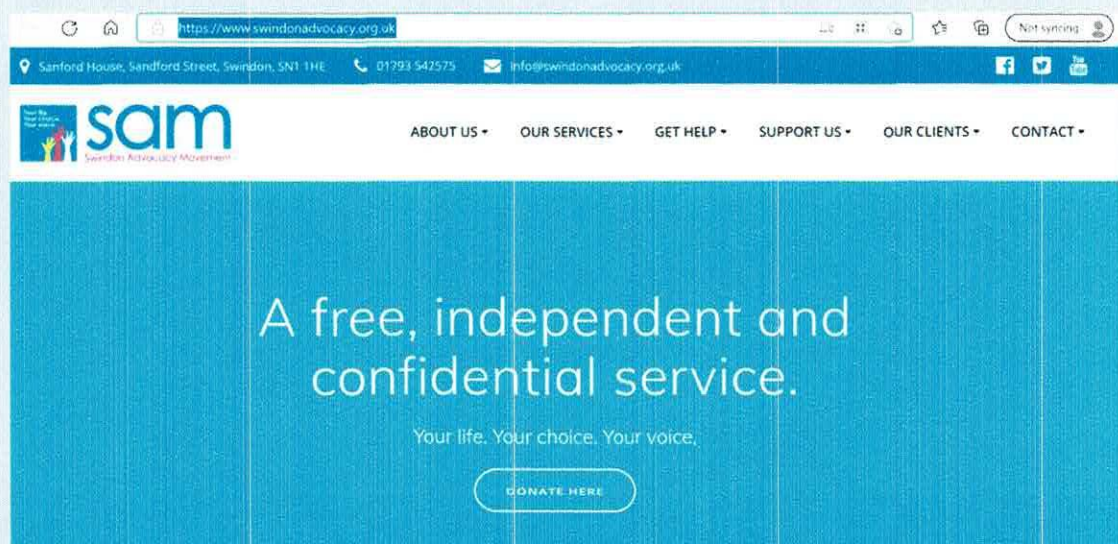


We increased our number of trained advocates across all statutory specialist services giving us the capacity to offer interface specialisms across the **Mental Capacity Act, The Care Act, and the Mental Health Act.**

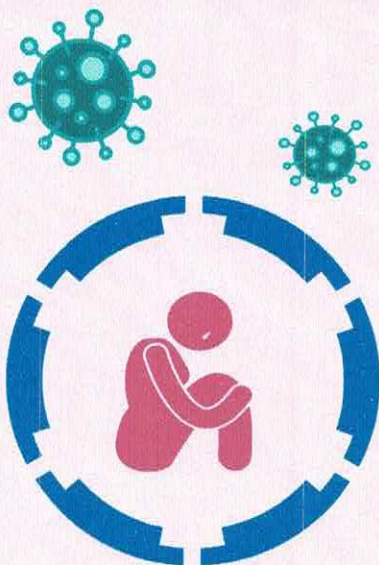


We now have **9 multi-trained advocates** which includes  
**5** qualified Care Act advocates,  
**5** Independent Mental Capacity Advocates  
and **4** Independent Mental Health Advocates  
with **6** people holding City & Guilds level 4 Diplomas  
in Independent Advocacy.

Our new website went live in July [www.swindonadvocacy.org.uk](https://www.swindonadvocacy.org.uk) which will make our service more accessible to clients and professionals.



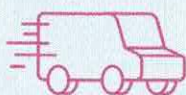
## WORKING UNDER COVID 19



The sudden impact of the pandemic left many of our clients isolated and vulnerable.

Many of them live independently in the community with little or no support and most had no access to the internet.

Some people had no means of keeping up to date with the changing, frightening situation and had no means of getting vital support they needed.



**Signposted** 137 people to food deliveries via the Live Well hub and other services



**Enabled** 89 people to get the medication they needed



Gave regular **emotional support** to 548 people



**Signposted** 194 to statutory health and social care services



**Made** 4030 phone calls to enable individuals to access support



Made regular wellbeing phone calls and delivered bespoke activity packs to 70 people with learning disabilities

## CHALLENGES MET DURING THE PANDEMIC



The team met the challenge of an **increase in demand** for the service and an intensity of work as many individuals in the community faced isolation and crisis.

Referrals for adults being detained under the **Mental Health Act** increased by **36%**.

At the same time the advocates found **creative ways** to support individuals and understand their needs and wishes whilst not being able to meet face to face.



We worked hard to support our staff team with **flexible working arrangements** and learnt how to use Teams quickly so we could all stay in touch and **work productively**.



They worked tirelessly and with **commitment** to ensure that the wellbeing of all our clients was protected.



Working within the **national guidelines** and to our **risk assessments**, they contacted people by phone, talked online, met people in gardens or parks and met people face to face in building based environments in safeguarding or crisis situations.



## ADVOCACY AT WORK...



“I have moved and I needed you to explain things simply so I could understand. I needed you to help me tell people what support I wanted. It works well now.”

Client treasures his reclusive lifestyle and is very protective of it - having said that he was always happy to receive advocacy visits and clarified at the beginning of each meeting how long he wanted it to go on for. It was interesting to see that as his understanding of advocacy increased he began to suggest slightly longer sessions and at the end of the pre agreed time he often said "we can go on for a bit longer". Client really understood the advocate role.

“Thanks for helping me I am so pleased.”

"Helped support me by getting a support worker"

"Absolutely perfect"

"Best company to support me and other people"

"Done so much"

"I don't know where I would be without SAM's support"

"Couldn't ask for a better person"

"Support me through good and bad times"

“Thank you ever so much for all your efforts I really appreciate it, the bus pass is such a life line for me. Thank you again and all the best for the future.”

## ADVOCACY AT WORK...



“Hello Rachel and Padraig. Thank you both so much for all the help, support and understanding you have given G and for keeping me in the loop. It's great to hear that the support package began as early as 23rd March. Thank you so much for getting us to this point and from us all we are truly grateful for the time, effort and understanding that you have given G. G's appeal for PIP was turned down but JB from CAB is taking it to Tribunal. I would also like to thank you for your time and effort in securing a care package for G. I know this will give him a much better quality of life both in the short and the long term.”

"It all went 'crispy crème well"  
Client thanked Georgina for  
"being there" and "appreciated  
your help".

Client confirmed he did not feel  
he needs support at the actual  
ward round itself but would like  
to have a conversation  
afterwards, he also said the  
advocacy support was useful  
"it's really good to have  
somebody to talk things over  
and get an understanding of  
what is going on".

“Your help was very useful  
because you told me what  
was happening when I  
couldn't face it and u  
explained things to me when  
I didn't fully understand or  
didn't hear properly, so yes  
were very helpful.”

“You have not stopped trying  
to understand me, you  
might not fully understand  
something but you will go  
away and think about it -  
that's what I need”

Client was caught up in a complex mix of family disagreements which culminated in the situation coming to safeguarding. Advocacy visits to client on the ward were very effective and client was very confident in describing the problems with certain family members, who she wants to see, who she wants to support and who she does not want to see. Client had a really good understanding of the role of advocacy in helping her to get her views heard.

“ Oh yes they said you could invite someone, and you were the first person I thought of. It is helpful to have an advocate, someone who is on your side. Who you can talk to. ”

“ The support I have had from Swindon Advocacy Movement and from the advocates including yourself has been the best support I have had in my entire life. ”

“ Really look forward to seeing you again as you were an absolute godsend to us and will always be in our hearts. ”

“ Thank you ..... After speaking to you, I feel so more confident and empowered to talk to the doctors about my needs and articulate my rights which are (reassuringly) not unreasonable. I wish I had known about your service a week ago (when I was admitted). ”

## ADVOCACY AT WORK...



Client had a really effective interaction with the advocacy support and very much took control of how she used the support - there were numerous accounts of Client saying, "I will talk to my advocate about that", or on some occasions she instructed a support worker to "please can you call my advocate and tell him I want to talk about something". At the time of closing Client was certain that she would like advocacy support again at her next Review.

“ For me when I talk with you everything is clear, everybody listen to you, everything is clear. ”

“ I am listened to, everybody know what I want. ”

“ I can breathe, for me it is calm.... you explain everything ”

“ I know what to do and who helps me. Safeguarding is closed – I can breathe now ”

“ Thank you so much for the wonderful support for today. I really appreciate it and believe your involvement was crucial in the Best Interests Meetings. After you left, we discussed about care provision, night support and homecare service and family was happy with the better understanding of clients' needs and what needs to be done per law. Many thanks again for support. ”

## FINANCIAL REVIEW



### ***Treasurer's Report and Financial Statement***

#### **SAM Year end figures 2020/21**

Income	£561,224
Expenditure	£523,161
Difference	£38,063

#### **Funds**

Unrestricted	£145,189
Restricted	£41,304
Total	£186,493

### ***Financial Position***

For the year ending **31st March 2021** the charity generated a surplus. This is a result of Covid emergency grant funding, some of which will continue to support our work into next year.

We are very grateful to **Zurich Community Trust, Lloyds Bank Foundation, The Big Lottery and Wiltshire Community Foundation** who provided valuable funds to enable us to respond to meet our clients' needs while the charity was under significant pressure to respond to unprecedented demand. The pandemic stopped us from community fundraising and limited the income we could raise through our spot purchase advocacy work.



## FUTURE PLANS



The COVID-19 pandemic has demonstrated the value of digital access and SAM will further develop our **Digital Inclusion** to support our clients.



We will continue to invest in our **staff** and will hold a salary review to give a sustainable increase where appropriate and set up a mechanism for future reviews.



We will also look at improving our **systems** with new database and reporting tools.



We will also develop our **spot purchase Advocacy** offering.