



SWAN ADVOCACY NETWORK

TRUSTEES' REPORT & FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 MARCH 2025

Charity Number: 1125679

Registered Company Number: 06599429

SWAN ADVOCACY NETWORK

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Swan Advocacy Network

Report of the Trustees

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

Reference and Administrative Details

Charity Name	SWAN Advocacy Network	
Charity Number	1125679	
Company Registration Number	06599429	
Trustees	Ms Claire Tough Mr Alan Guyver Mr Peter Harding Mrs Lynda Corwin Mr Povanen Veerappapillay Mr Mahrus Jalil Mr Richard Davis Mr Matthew Wall	Chair (resigned 21 November 2024) (resigned 21 November 2024) (resigned 21 November 2024) (appointed 21 November 2024)
Chief Executive	Vikki Holloway	
Registered Office	Hi Point Thomas Street Taunton Somerset TA2 6HB	
Bankers	CAF Bank Limited 25 Kings Hill Avenue West Malling ME19 4JQ	
Auditors	A C Mole LLP Chartered Accountants and Statutory Auditors Stafford House Blackbrook Park Avenue Taunton Somerset TA1 2PX	

Swan Advocacy Network

Report of the Trustees

Chair's Introduction to the Annual Report and Financial Statements 2025

The 2024–25 financial year marked a period of consolidation and reflection for SWAN, following the rapid expansion and contract awards of 2023–24, which saw the addition of West Berkshire, Portsmouth and Dorset to our portfolio. This year, our focus turned inward—welcoming new teams into SWAN and ensuring they were supported through high-quality induction and training programmes.

Our CEO and Executive Team have worked diligently to strengthen the operational and quality frameworks that underpin our service delivery. This included laying the groundwork for a forthcoming reorganisation of our management structure and introducing new metrics and assurance mechanisms to enhance strategic oversight by the Board.

In October 2024, we successfully handed over the Bristol contract, while also engaging in competitive tenders for the East Sussex advocacy service and the re-tender of our Somerset service. We are proud to report that both were awarded to SWAN and are scheduled for implementation in the 2025–26 financial year. This year also marked the conclusion of our Victims of Crime Advocacy Service (VOCAS), which came to a close after six impactful years. During this time, SWAN provided enhanced adult advocacy to 1,695 victims of crime and anti-social behaviour across Avon and Somerset. Although the new service was not re-tendered, we remain proud of the legacy and outcomes achieved through VOCAS.

Our commitment to Equality, Diversity, and Inclusion (EDI) was reaffirmed in 2024–25 with the re-establishment of the EDI Group and a refreshed, more accessible bi-annual workforce EDI survey. These efforts support our ongoing work to monitor and improve diversity across both our Board and workforce. Co-production continues to be a cornerstone of our approach. This year, the Somerset Co-production Group emerged from our Autism Project, with a mission to improve accessibility for clients with diverse communication needs across the region.

Finally, we began our AQPM (Advocacy Quality Performance Mark) assessment. Early feedback from the draft report has been encouraging, highlighting the value of our services and the positive experiences of those we support. One comment particularly stood out: “Feedback from people who had accessed SWAN’s advocacy services was very positive and indicated a much-valued service. There was a strong thread of good support being provided with people feeling listened to and empowered.”

As Chair, I am proud of the resilience, dedication, and compassion shown by our teams throughout this year of consolidation and together, we have laid a strong foundation for the future. This has been achieved through the hard work and dedication of Vikki our CEO, her Executive Team and the SWAN workforce who work tirelessly for their clients, all supported by our Board of Trustees who have also supported me throughout the year. I extend my thanks to all at SWAN and all of our involved partners.

Claire Tough
Chair of Board of Trustees

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SWAN's Vision

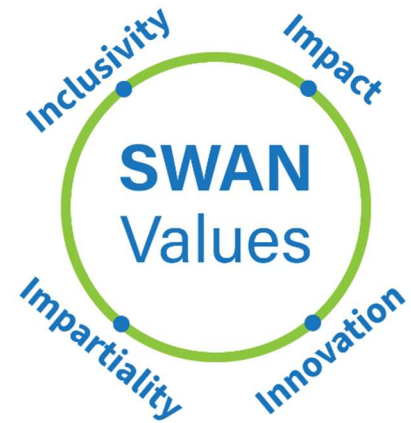
SWAN is committed to furthering the human rights of individuals by helping people to access their rights, lead the lives they want to lead, live without fear of discrimination and be as independent as possible. SWAN Trustees and workforce are passionate and committed to the work that SWAN does recognising that 'everyone needs someone on their side'.

SWAN's Vision is:

'A world without discrimination, with true social justice, where people are treated as equals and have influence on the decisions that affect their lives'.

SWAN's Mission

SWAN operates in a competitive environment, delivering services to the most marginalised people in society and striving to ensure that access to rights operates on an equal basis. The people delivering SWAN services are passionate about their work and SWAN is an organisation that cares deeply about justice, fairness and independence.



SWAN's Mission is:

'To be a fair and inclusive employer, respected by all stakeholders for delivering high quality, person centred and innovate services that ensure equal access to rights'

What we do

Advocacy has its foundations in Human Rights; we support people to get the information they need to understand them. Everyone has the right to ensure that their wishes are at the centre of decisions being made about them. Advocacy helps people to have their voices heard so that they can achieve the outcomes they want in their life. SWAN provides different types of advocacy to people in a variety of different situations and always seeks to enable as much independence as possible for every individual.

Victim of Crime Advocacy Service (VOCAS)

VOCAS provided enhanced adult advocacy alongside practical and emotional support to victims of crime and anti-social behaviour across Avon and Somerset. The service empowered and enabled individuals to cope and recover from their experience as a victim of crime.

"Everyone was very friendly and accommodating, and I enjoyed the responsibility of getting involved with my own cases."



**VOCAs
Volunteer**

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Independent Mental Capacity Advocacy (IMCA)

Our IMCA service provides independent advocacy for people who are deemed to lack capacity and have no-one else to represent them in decisions being made about their life. This may include where they live, what medical treatment they receive, what care and support they need or as part of 'protective measures' to ensure they are safe from harm or neglect. IMCA advocates also work with people who are subject to a Deprivation of Liberty Order (DoLS).



Professional

"Your contribution to G's improved situation can't be underestimated. I've witnessed how comfortable she is in your presence and you ensure her voice is heard in discussions regarding her future accommodation"

Deprivation of Liberty Safeguards (DoLS)

Advocacy is provided for people who experience deprivations of liberty through their living accommodations and/or their care planning approaches. Advocates ensure that restrictions are necessary and proportionate, and that mental capacity and best interest decisions have been fairly made, or whether an application to the court of protection is necessary to challenge a decision. Some advocacy for DoLS is provided by IMCAs and some can be provided by a paid or volunteer advocate who is appointed as the Paid Representative.

"Emma was a good person to work with over the past year. She always ensured the residents needs were being met, and any additional things were completed ASAP."



Professional

Independent Mental Health Advocacy (IMHA)

IMHA's have a regular presence on mental health wards to support people at tribunals, appeals, care plan meetings and those on ward rounds who have been detained under a Mental Health Section, a Community Treatment Order or Guardianship, an informal inpatient at a mental health hospital or the Carer of a qualifying patient. Advocates help people to access records and legal support; communicate with professionals and understand their rights in relation to their legal situation, their medication, and their right (or not) to temporarily or permanently leave the place of detention. IMHA's also facilitate 'Have your Say' meetings on wards to provide feedback on their experience and raise any issues to the ward.



Client

"Part of the reason for me feeling better is what the advocacy service and all of you have done for me especially the level of understanding and patience. So the advocacy service has some part to play in this. It's had a massive impact on the few relationships I have at a time I needed it. So I want to just say thank you all of you. You all have made a positive difference in my life."

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Independent Care Act Advocacy (Care Act)

The Care Act of 2014 ensures that people who have 'substantial difficulty' in understanding the Care Act processes and have no other appropriate person to support them is entitled to an independent advocate. 'Substantial difficulty' may be due to a learning disability or a physical or mental health condition. The aim is to ensure an individual's wishes are at the heart of the process and to enable them to be involved as fully as possible.

Independent Health Complaints Advocacy (IHCA)

This service is provided to anyone over the age of 18 who has a complaint about any NHS funded service within the previous year. We support people to consider the outcome they would like from making the complaint and we adapt the level of advocacy support required during the complaint process to suit the individual. SWAN provides a range of self-advocacy tools for people to pursue their own complaint if they feel able to do so. Health complaints can be long and complicated with many cases staying active for more than 12 months.

"Thank you for being my voice when I lost the ability to speak. You honestly made such a difference, and I can wholeheartedly say that you made me feel heard."



Client



Client

"I do appreciate all your help & being with me in the meeting. I have never had confidence to talk up like that before in my life but with you by my side I felt I could do it, once again thank you"

Community, Self or Generic Advocacy

Community advocates work with individuals who have difficulty being involved in decisions that affect them due to learning difficulties, physical or mental health issues, acquired brain injury or dementia. Advocates ensure that individuals are afforded fair and equal treatment through knowledge of all available options and access to relevant information and professional advice. This includes a wide variety of issues including benefits assessments, medical appointments, employment issues, gaining access to care and support, working with their care provider and making complaints. Other community advocates work to promote and support self-advocacy within their localities for people with a range of disabilities, commonly shared experiences and concerns. This advocacy support is accessed through our Be Heard projects.

"I just wanted to say again, thank you for today. It was lovely to meet you and to feel empowered to say what I've wanted to for some time. I really appreciated the support."



Client

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Non-instructed Advocacy

Non-instructed advocacy uses different approaches when an advocate is representing a person who is unable to instruct and/or consent to advocacy provision. The approaches used focus on all or some of the person's circumstances, for example, their unique needs and views or the appropriateness of their care or accommodation services or as part of formal health and social care decision making to ensure the person's views are at the heart of these processes. Not all advocates will use non-instructed advocacy, but it is an important part of independent advocacy knowledge and non-instructed advocacy training is provided to all active advocates.

"I had been non-verbal for 2 weeks whilst in hospital on section. I was using some sign language and my text app to communicate. She was able to help me communicate my needs and look at what support I need when I was discharged."



Client

Children and Young People's Advocacy (CYP)

CYP supports children and young people who are looked after, within child safety legislation or who are receiving health & social care services. SWAN IMHAs work with young people detained on ward and young people who are transitioning to adult social care services and have a right to access a Care Act Advocate. IMCAs may also work with young people aged 16yrs+ as Be Heard Community Advocates.

Performance Report

Our Goals and Performance during 2024-2025

SWAN has developed the following strategic goals to further the charitable objects of the organisation and deliver its Vision and Mission.

1. Embed organisational resilience by generating financial and people capacity to increase its outcomes and impact
2. Enhance our profile, build our reputation and expand our geographical footprint in the South-West and nationally
3. Increase our influence, capacity and ability to act through the development of strategic alliances and partnerships

The achievement of the strategic goals will increase revenue, efficiencies, collaboration and advocacy awareness through a broader geographical footprint. Furthermore, it will encourage a healthy workforce through strong retention and cultural cohesion. The cultural foundations of SWAN are of vital importance and built on trust, accountability and personal responsibility which is a tangible thread through all that we do, underpinning relationships, decisions and behaviour.

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Top Issues Supported



Rights under the Mental Capacity Act

Supporting people to be at the centres of decision-making processes



Rights under the Mental Health Act

Supporting people to be fully involved with and challenge their care and treatment



Access to Health and Social Care

Supporting applications for Needs and Care Assessments



Parents Advocacy

Supporting parents with additional learning needs who are within children and family services



Health and Social Care Complaints

Supporting people to use formal processes regarding their health or social care experience

During 2024-25 SWAN delivered advocacy throughout Bath & North East Somerset; Bournemouth, Christchurch and Poole; Bristol; Dorset; Isle of Wight; North Somerset; Portsmouth; Somerset; South Gloucestershire and West Berkshire. SWAN was also awarded the advocacy contract for East Sussex during the financial year, but the implementation will occur during 2025-26.

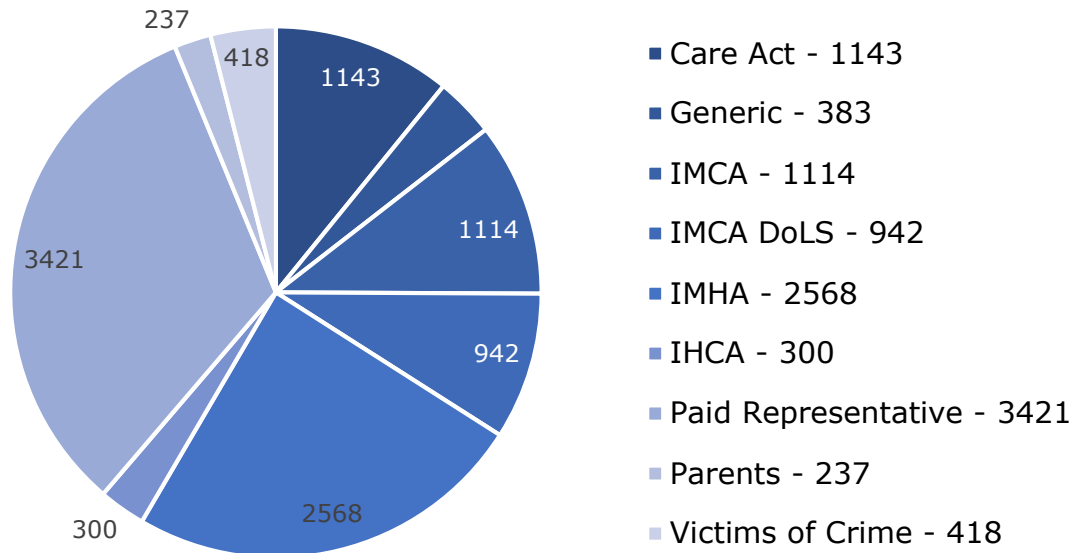
We aim for a local and responsive approach with hub and office spaces where appropriate, working closely with Commissioners and tailoring the services to the individual requirements of the contracts.



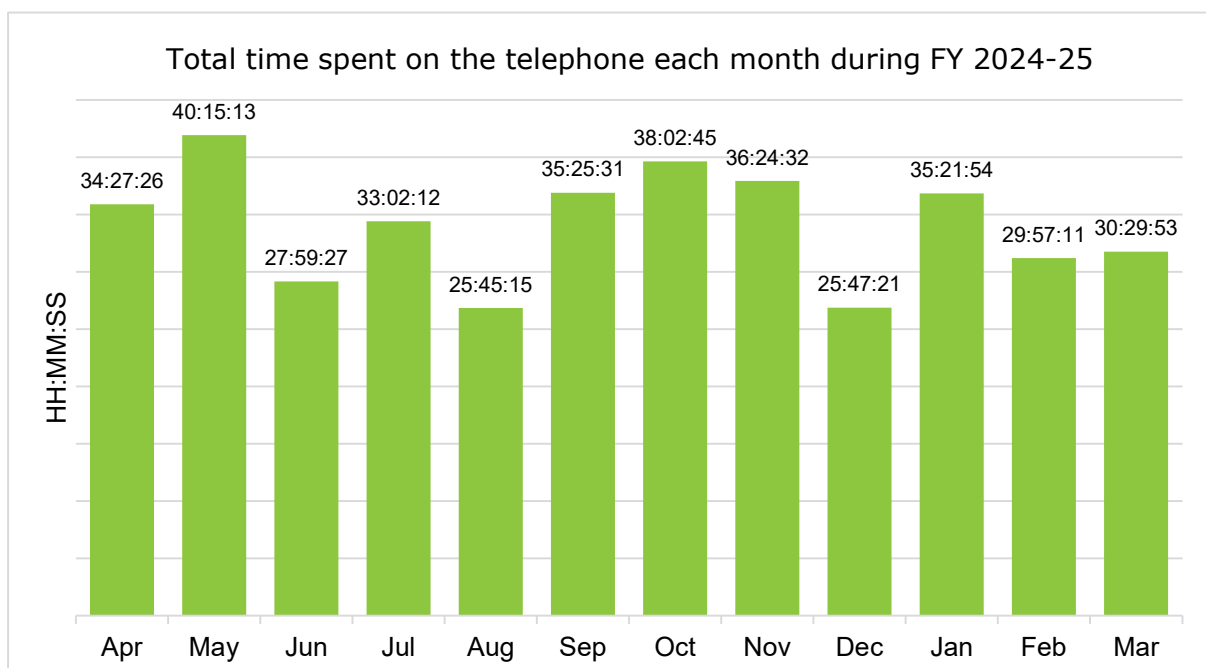
Swan Advocacy Network

Report of the Trustees For the year ended 31 March 2025

In working toward achieving the strategic goals during financial year 2024-25 SWAN held 10,526 active cases and received 7,365 referrals from partner organisations and self-referrals amounting to 77,133 total advocacy hours. During this time SWAN supported clients through the following themes:



SWAN operates a 'no wrong door' ethos and individuals can access our services through a variety of means. Our Advocacy Support Team who receive referrals into SWAN are highly experienced in assessing eligibility and communicating with vulnerable people. They provide support to clients through first response advocacy, triage and expert signposting. During the financial year the team answered a total of 5,507 calls and spent the equivalent of 16 days, 8 hours and 58 minutes talking time with clients.

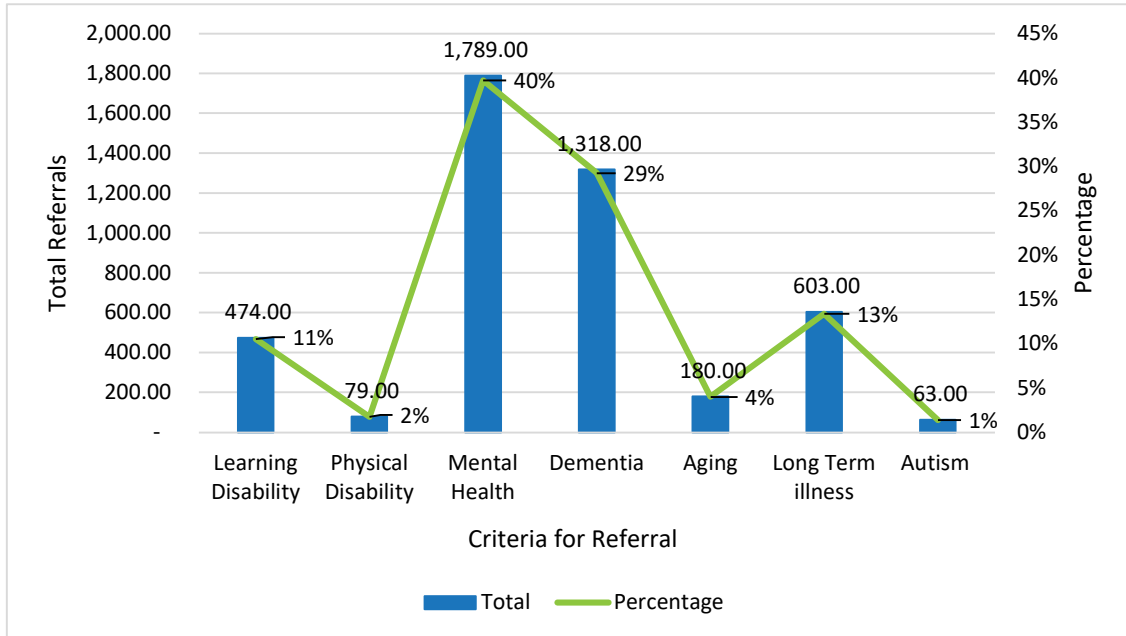


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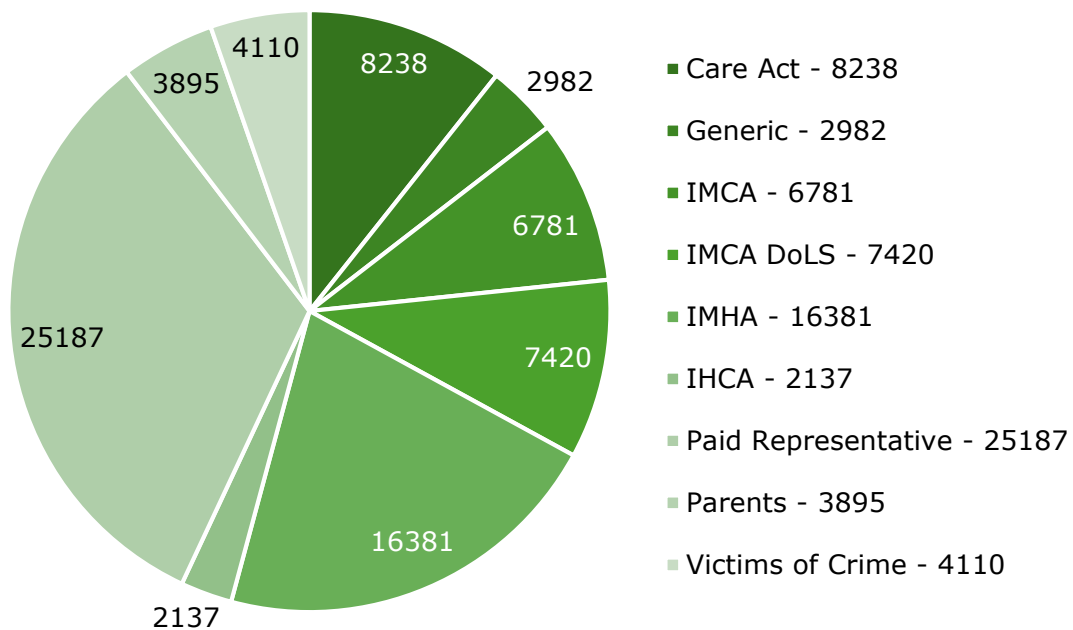
Report of the Trustees

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During 2024-2025 our largest number of referrals related to mental health, followed by dementia, as seen below:

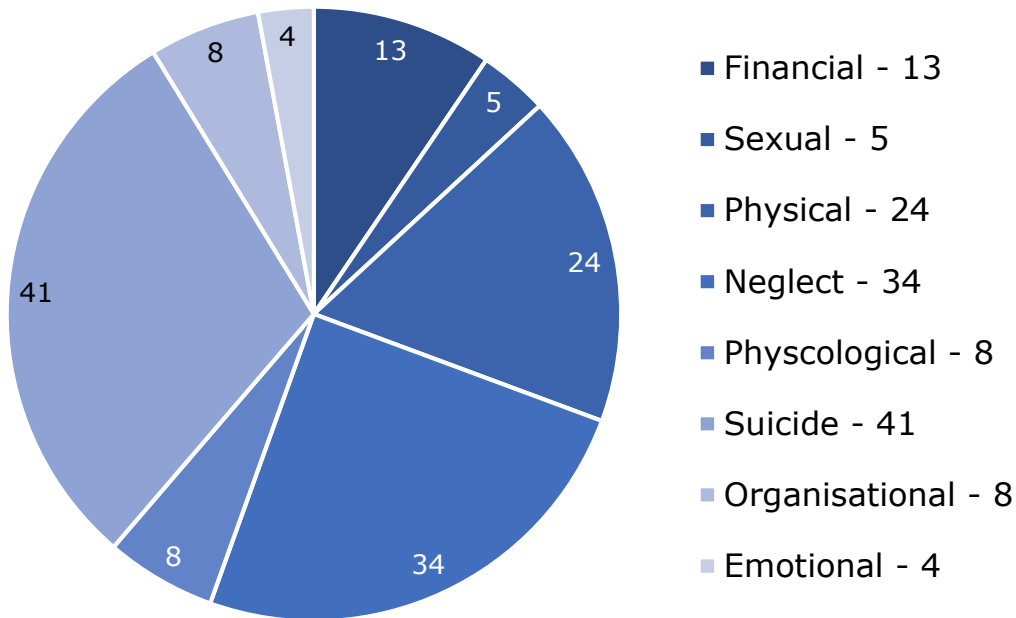


Over the financial year, SWAN spent a total of 77,133 hours on the different types of advocacy, categorised below:



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Safeguarding our clients is an important part of our work and advocates remain vigilant in raising safeguarding alerts. During 2024-25 advocates raised 137 concerns in the following categories:



Pro-active Safeguarding

All Service managers are members of their local Safeguarding Adults Boards. In September 2024, SWAN was thanked for delivering an Advocacy presentation to the SSAB tailored to the participants, with a remit to inform the board of the different types of advocacy provided by SWAN and how to refer into the service. SWAN takes pride in its approach to Safeguarding. The following comment is taken from the draft AQPM report 2024:

"SWAN evidenced there was robust approach to safeguarding throughout the QPM assessment. The advocates we spoke with were all able to describe clear and consistent approaches and had a good understanding of the organisations' expectations and the mechanisms in place in relation to safeguarding reporting, recording and best practice. Site visit conversations indicated that staff were also mindful how utilising SWANS's safeguarding policies and procedures strengthens their ability to safeguarding people in mental health settings"

AQPM comment from 2024 draft report

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Victim of Crime Advocacy Service (VOCAS)

During our 6-year contract VOCAS empowered and enabled 1,695 victims of crime and anti-social behaviour to cope and recover from the impact of their experience.

1,070 of the individuals supported experienced mental health issues, others had physical and/or learning disabilities. VOCAS also worked with victims who experienced crime and discrimination based on their gender, gender identity, race and disability. Many of the cases were complex with multiple issues to be addressed.

"[The crime] led to me having Post Traumatic Stress Disorder and severe anxiety Throughout the experience [with VOCAS] I have been reassured, supported professionally and with empathy at all times"



Client

How SWAN lived its Values

Our Values are central to our approach and the work we do on a daily basis. We work hard to ensure that we demonstrate our commitment to them in all of our work:



Inclusivity

We work with people to find the best way to deliver advocacy to them and their communities. In 2024-2025 we delivered Be Heard Projects to support people who weren't entitled to statutory advocacy to develop their self-advocacy skills and confidence.



Innovation

We are independent from other agencies meaning we can determine new ways to deliver advocacy in the way that people need it. During the reporting period we supported individuals to develop person directed Advocacy Plans and provided advocacy coaching sessions.



Impact

We find new ways to measure our impact and use that information to improve what we do and how we do it. During the financial year, in partnership with experts by experience to ensure accessibility, we launched our bespoke online client outcomes surveys for all contacts and projects.



Impartiality

In 2024-25 we continued efforts to ensure advocacy is accessible to everyone to ensure everyone can access social justice. This included prisoners, homeless people and those at risk of homelessness and individuals subject to hate crime.

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Volunteering and Co-Production

SWAN is complimented by our volunteers and experts by experience, who selflessly give their time to provide support to individuals and add value to our services. Our volunteers progress through a bespoke and dedicated volunteer induction and training programme and some volunteers go on to become paid members of staff. During 2024-25 SWAN volunteers contributed 667 hours.

In February 2024 SWAN's office team was joined by an expert by experience, with a learning disability, to work with us to create easy read referral forms and ensure our easy read documents are accessible. The Somerset co-production group launched in May and met every two months. The group emerged as a result of our learning from our autism project where a co-production group of experts by experience were involved throughout. The group aims to increase accessibility across Somerset for clients with different communication needs.

One of our experts by experience from the autism project has remained with us to provide consultancy on cases where there is an autistic client and where their autism could be a barrier to advocacy engagement. Our consultant also helps us to reviews our documents to ensure they are autism friendly.

Be Heard Programmes

A variety of Be Heard self-advocacy programmes were run throughout the service areas, all of which were well received by the attendees. Staff ensured the sessions were tailored to individual need to afford everyone the best possible experience. These programmes are designed to increase self-advocacy and empowerment for members of the public.

Staff on the Isle of Wight ran four Be Heard programmes for general public access during 2024-25. In January the programme was advertised and attended by people who were contacted prior to the workshops to ensure the sessions were tailored to meet individual needs.

Outcome	% Agreement
Learnt new ways to self-advocate	100%
Feel more confident planning how to get what they need	100%
Confidence to self-advocate increased	100%

The August programme had five attendees. People shared their experiences and what they hoped to achieve. This ranged from individuals needing to support clients, to others needing self-empowerment to deal with issues in their own lives including more knowledge about The Human Rights Act.



Be Heard
Attendee

"Thank you again for the Be Heard self-advocacy course, which was excellent. I thought you might like to know that I've got involved with the traveller dispute and thanks to you, I gained the courage to submit a formal complaint"

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During the financial year, SWAN ran Be Heard programmes at Albany and Parkhurst Prisons which afforded opportunities for co-production with prisoners; a full Be Heard in Somerset programme at the Recovery College for people with mental health issues and a Be Heard workshop in Bridgwater for ten people with hearing loss. Feedback from the participants indicated that individuals found real value in the programmes.

"Great for networking, finding different organisations and support, gaining skills to self-advocate."

"The trainer was brilliant. The toolkit helped me self-advocate with my GP to get what I needed with medication."

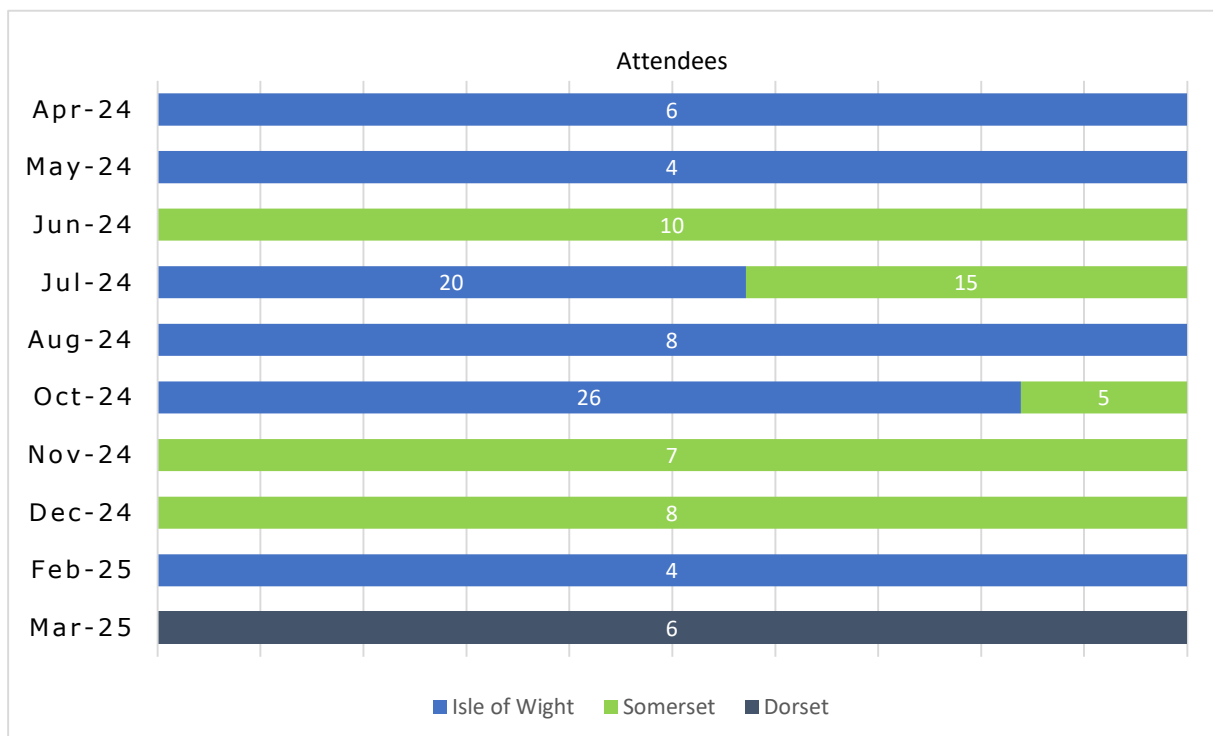
"The course was brilliant, Catherine was great, so much information that was invaluable"

"Catherine clearly understands her subject well and has the experience to be able to support the theoretical content of her subject"



Participant

The chart below shows the number of attendees to our Self-Advocacy sessions held in Somerset, Dorset and on the Isle of Wight during 2024-25:



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Training, Education and Addressing Communication Barriers

We identified the need for a refresher training session on 'total communication', to assist advocates when working with clients with communication impairments. We explored ways to communicate with clients with Profound and Multiple Learning Disabilities (PMLD). This developed transferable communication skills with other non-verbal clients including those experiencing impairments in verbal communication resulting from physical causation such as dementia or a stroke. Our trainer explored a variety of communication strategies which advocates found particularly useful, giving them the practical skills and confidence to use different approaches to communication in their practice.

Deaf and Hearing Impaired

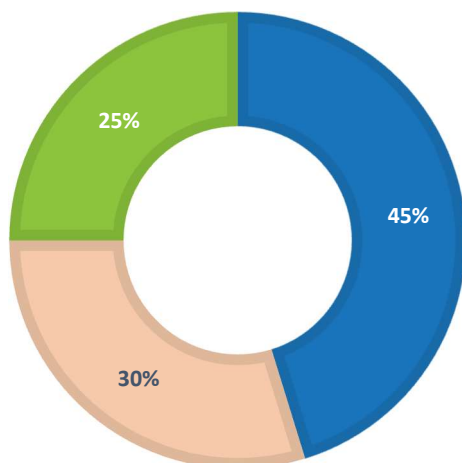
To improve the quality of our advocacy for deaf and hearing-impaired clients, we approached expert by experience and Director of Deafnate to provide deaf awareness training for advocates and a member of the support team. As a result, we have trained a member of the Somerset team to become a Deaf Awareness Champion.

Independent Advocacy Qualification Training

SWAN has successfully provided internal training for many years and continues to be an excellent resource ensuring that all advocates are appropriately trained in Independent Advocacy and receive regular workshops to upskill on all disciplines. ARC England are partners with SWAN enabling the in-house assessment for the Level 4 Independent Advocacy Qualification from two internal assessors. Three quarters of staff providing direct advocacy or advocacy management are qualified or qualifying. New advocates and experienced advocates joining the service without a qualification commence their qualification following a successful induction period. The following chart shows the number of staff qualified or in qualifying phases.

ADVOCACY QUALIFICATION 24-25

■ Qualified ■ Qualifying ■ Induction or other



Key:

Qualified

Advocacy staff who hold a Diploma, Certificate or Level 4 Independent Advocacy qualification.

Qualifying

Advocacy staff who are actively completing their Level 4 Independent Advocacy Qualification.

Induction or other

Advocacy staff who are currently not qualified, for example, new starters in induction processes.

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Workforce Development

SWAN is committed to developing its workforce and provided Management Training accredited by the Institute of Leadership for two Service Managers and supervisor training for three Team Supervisors. This training is bespoke to the needs of the organisation and is developed by Access2 Human Resources, our human resource partners and SWAN's Chief Executive who is Fellow of the Institute of Leadership.

SWAN continued refresher training sessions on 'total communication' to assist advocates when working with clients with communication impairments. Deafinite for deaf and hearing-impaired clients also continued with Lunch and Learn training for the workforce.



"The team have been very supportive, kind, respectful and understanding of my learning needs."

"The availability of shadowing opportunities and vast range of clients I was able to access."



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Partnership Working

During 2024-25 SWAN contributed to a range of engagement and development work including:

- Leaders in Advocacy Group – SWAN formed part of the Ethical Commissioning Group which evolved from Leaders in Advocacy Group scrutiny of the NHS and NDTi Review of Independent Advocacy document (published in 2023)
- SCIE Providers Group – meetings to feedback and consult with SCIE on a range of health and social care provider themes.
- Mental Health Act Reform Consultation in partnership with the Leaders in Advocacy Group. A wider consultation and feedback forum from advocacy providers for the White Paper process in Mental Health Act legislation.

SWAN have maintained contact with stakeholders and partners and supported an understanding of independent advocacy practice through event speaking & training including:

- Carnival of Practice - Speakers for Independent Advocacy – topic '*MCA and Communication*' – arranged by Somerset Local Authority
- Statutory Advocacy training delivery for Bristol Royal Infirmary Discharge Team
- *The Independent Advocacy Role* in Safeguarding for a Safeguarding Adults Board
- Co-teaching partnership with University of the West of England. Sessions for social work students re: *role and benefits of advocacy & IMCA role in Deprivation of Liberty Safeguards.*



Senior Lecturer UWE

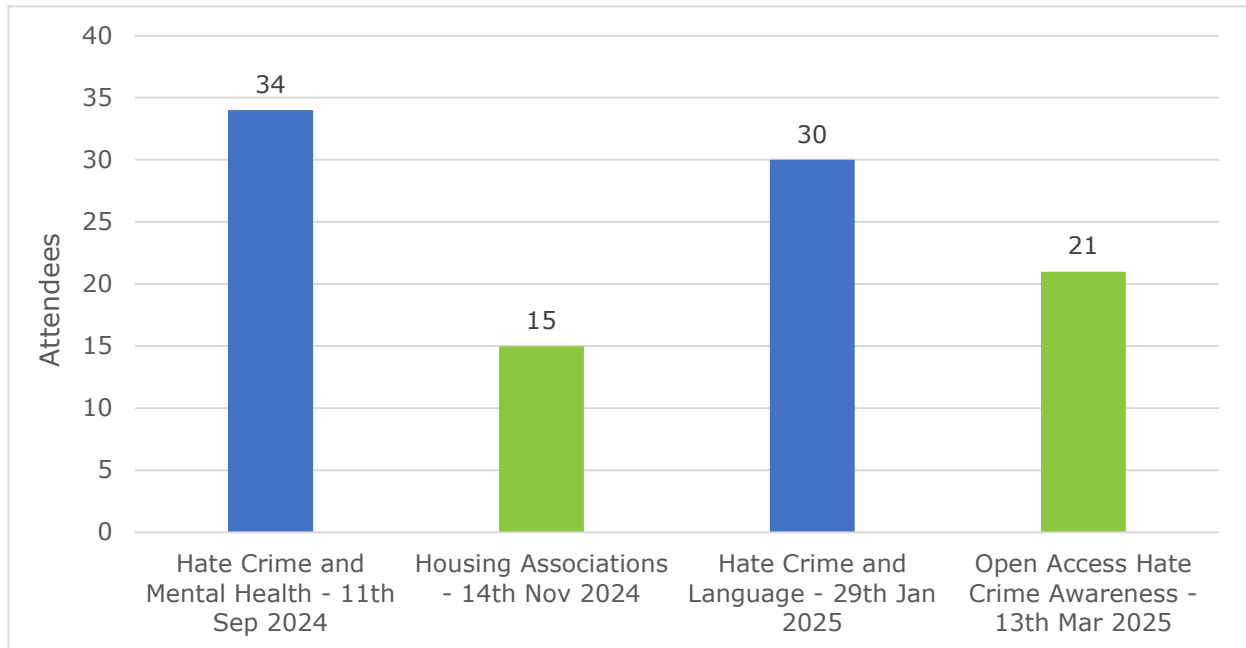
"Your involvement in teaching is always welcome as you are engaging and enthusiastic about the advocacy role generally. You are able to give nuanced and informed advice to the BIA students about the specialist representative and advocacy roles they might encounter in practice and give social work students important insights from both a legal and practice perspective into the similarities and differences between advocacy and social work roles in Care Act and safeguarding practice."

Every Victim Matters

Stand Against Racism and Inequality (SARI)'s National Lottery funded Every Victim Matters (EVM) service continued this year. SWAN partnered with SARI and The Diversity Trust delivering sessions for professionals and members of the public in Somerset, North Somerset and Bath and North East Somerset (BaNES) throughout 2024-25 SWAN were able to demonstrate our expertise in working with people with disabilities and our experiencing of supporting people with additional needs to cope and recover from the impact of hate crime and anti-social behaviour. These sessions, which ran for either 1 or 2 hours, attracted a greater number of attendees than the previous financial year. We also experienced improved attendee engagement and more positive feedback regarding the impact of the training. During 2024-25 SWAN supported the development and delivery of the following:

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SWAN look forward to working with SARI and the Diversity Trust in 2025-26 to further improve Every Victim Matters provision and achieve even better outcomes.

"Partnership working came across as very strong, with commissioners, partner providers and with some community organisations and almost without exception there is positive feedback from external stakeholders who reported teams to be reliable, responsive, helpful and collaborative with a transparent and open, solution orientated approach."
AQPM comment from 2024 draft report

Student placements

SWAN benefits greatly from the dedication of our students during their social work placements. During financial year 2024-25 Student Social Workers contributed 1,306 vital hours of advocacy. Placements, for both 70 days and 100 days, occurred on the Isle of Wight in partnership with Solent University and in Somerset in partnership with the University of West England.

Students learn about advocacy, application of legislation and how to ensure the persons views are respected. Some students go on to take casual work as an advocate. SWAN is very grateful for the time and commitment offered by our students and the invaluable partnerships with the University's.

One student provided the following feedback:

"The Somerset team are incredibly knowledgeable, and every member of the team works hard to support their clients fully, maximising both their time and extensive knowledge by working together and sharing expertise. As a student on placement with the Somerset Team, I was welcomed with open arms and integrated into the team; people took the time to teach me, spend additional time with me shadowing them and help whenever I needed some guidance. SWAN, as an agency, is incredibly supportive, but the kindness and knowledge I worked alongside will be a guiding force in my practice going forward. Thank you, Somerset!"



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SWAN is grateful to all its partners for the work we do together.



Legal Status and Charity Objectives

Swan Advocacy is a company limited by guarantee 06599429 incorporated on 21st May 2008 and registered as a charity 1125679 on 1st September 2008 with the legal framework set out in the governing documents, the Memorandum and Articles of Association. For the purposes of the registered company and legal requirements, it is referred to as “Swan Advocacy”, however the charity now trades as ‘SWAN’ (South West Advocacy Network).

Objectives of the Charity

SWAN’s objectives are expressed in the governing document, as follows:

The objects for which the Company is established are:

- a) the relief of those in need, by reason of youth, age, ill-health, disability, financial hardship, or other disadvantage in particular but not exclusively by the delivery of advocacy, money management and debt counselling.*
- b) the advancement of education in particular but not exclusively through the delivery of self-advocacy, training and end of life planning.*
- c) the advancement of human rights, conflict resolution or reconciliation or the promotion of religious or racial harmony or equality and diversity, in particular but not exclusively by the provision of statutory advocacy and victim support services.*

Primarily, but not solely, in counties across the South West of England or adjoining the South West.

Under Charities Act 2011, Public Benefit requirement, Trustees have a duty to report on how SWAN meets its charitable objectives for the public benefit. The strategic report provides information on how SWAN has achieved this primarily delivered through the provision of advocacy and during 2024-25 SWAN held 10,526 active cases and received amounting to 77,133 total advocacy hours.

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Report of the Trustees

For the year ended 31 March 2025

Governance

The Trustee Board is responsible for the governance of the Charity and ensuring that it delivers its objectives. Operational management is delegated by the Trustees to the Chief Executive who is accountable to the Board. The Trustees are also Directors of the Company for the purpose of company law. All Trustees are appointed through a transparent recruitment and selection process and are elected to the Board at the annual AGM. The skills and experience required for the organisation is reviewed through annual board appraisals; continued governance improvements were made via refined reporting and assurance mechanisms.

During the reporting period, the Trustees met formally four times for Board meetings and held an AGM in November. The meetings were all in person at the Head Office in Taunton. The Chief Executive and the Director of Finance and Central Services attend all Board meetings and other members of the Senior Leadership Group attend as required. The Board held an evaluation day in May 2024, enabling more detailed discussion and information sharing relating to newly awarded contracts, and our new ethics policy.

Due to the size of the organisation and the Board, there are no sub-committees, and all information is discussed at Board level. This is kept under review as SWAN continues to grow. A Trustee Task and Finish Group with members from the Board is enacted when there are specific pieces of work to undertake. In February 2024 Trustees attended a Governance Workshop facilitated by an external Governance specialist.

Risk Management

A comprehensive Board Assurance Framework and Strategic Risk Register is in place and is agreed on an annual basis. Trustees review the major risks to the organisation on a quarterly basis at Board meetings. Systems are in place to monitor, and control identified risks to mitigate the impact they may have on the Senior Leadership Group review the operational and strategic risks on a systematic basis by way of standing agenda items to ensure that current and emerging risks are considered regularly and raised to the Board if required.

During November and December 2024 SWAN prepared for, and engaged with AQPM reaccreditation, the only accreditation specifically aimed at Advocacy organisations. Assessment and interviews with the workforce, senior managers, CEO and Trustees took place during 2024-25. It is anticipated that SWAN will be reaccredited during Q2 of the financial year 2025-26.

SWAN partners with SSG Health and Safety advisers who conduct a comprehensive annual audit of the organisations Health and Safety policies, procedures and processes. The 2024-25 audit demonstrated that SWAN is compliant with no major issues and that minor areas for improvement are addressed.

Organisational structure and people

The operation of the organisation is delegated to a full-time Chief Executive who is supported by a Senior Leadership Group including Director of Business Development and Marketing and a Director of Finance and Central Support; two Head of Services who lead on day-to-day operations, a Volunteer Manager and a Training Manager. SWAN has a head office in Taunton, an office in Dorset and three hub offices, in Bristol, Portsmouth and the Isle of Wight. In October 2024 SWAN TUPE'd the Bristol team out of SWAN and the VOCAS contract expired in March 2025, resulting in a decrease in personnel on the previous year. During 2024-25 SWAN on average employed 109 staff which equated to 77 full time positions which was enhanced by 667 volunteer hours. SWAN staff and volunteers have a wide array of skills and experiences; all advocates are either qualified or registered to complete the required level of training in Independent Advocacy.

Swan Advocacy Network
Report of the Trustees
For the year ended 31 March 2025

Organisational structure and people (continued)

A year of consolidation ensued following the previous year of considerable change and geographical expansion. SWAN is committed to ensuring that all staff and managers have the skills required to enable them to thrive and enjoy their working life within the organisation. The workforce EDI Group, which includes a Trustee and workforce members from all delivery areas, representing all diversity streams met and revised the bi-annual Workforce Equality, Diversity and Inclusion Survey to ensure accessibility and increase response levels. The Group also reviewed progress against SWAN's EDI strategic goals.

Remuneration Policy for Staff

Employee salaries are set at a specific scale and level, which allows for progression in the role at a salary which is reflective of similar organisations pay. An incremental rise is considered every April following the completion of a positive appraisal review and subject to affordability. Any substantial changes to remuneration are agreed by the Board as required. During the financial period the handover of contracts, significant changes to employers national insurance contributions and national minimum wage increases meant that whilst salary uplifts were considered, the organisation was unable to award increases except to those on the lowest pay scale to ensure that all employees receive more than national minimum wage. SWAN staff pay is determined by the pay scale for all employees except for the Chief Executive whose pay is determined by the Board.

Responsibilities of the Board

SWAN Board of Trustees, who are Directors of the Company, work closely with the Chief Executive to set the strategic direction of the organisation. It is their responsibility to safeguard the assets of the Charity and ensure the financial statements comply with the relevant acts and legislation. Trustees volunteer their time, skills and expertise freely and receive no financial benefit from the charity, expenses that are incurred may be reclaimed and these are disclosed as required.

Company law requires that Trustees must not approve the financial statements unless they are satisfied that they give a 'true and fair' view of the income and expenditure and financial state of affairs of the Charity. The Trustees must keep proper accounting records that disclose the financial position of the charity with reasonable accuracy at any given time. Each Trustee confirms that as far as they are aware there is no relevant audit information of which the charitable company's auditor is unaware; also that individually, all steps that should have taken to be aware of any relevant audit information have been taken and to ensure the charitable company's auditor is aware of information that comes to light. This is confirmed in accordance with the provisions of s148 of Companies Act 2006.

Public Benefit

The trustees consider that they have complied with their duty under the Charities Act 2011 to have regard to the public benefit guidance issued by the Charity Commission.

The advocacy services provided by Swan Advocacy directly benefit those in society who are at their most vulnerable, due to age, illness, disability, in poverty or are socially excluded or a situation that they find themselves in e.g. bereavement, victim of crime.

Swan Advocacy Network

Report of the Trustees

For the year ended 31 March 2025

Public Benefit (continued)

SWAN works within its charitable objectives to support people to have a voice, to uphold their rights, to prevent discrimination and to gain the support and care that they need and are entitled too as well as resolve complaints, concerns and difficulties. As well as our direct beneficiaries a wide range of others in society in general benefit, including those who come into contact with and care for our direct beneficiaries.

Often the role the advocate has undertaken will influence and change working practice with statutory or other care providers thus benefiting the wider society and communities we work in.

We work with our commissioners to identify gaps in provision and any barriers to people receiving the support and care they are entitled too. We believe that it is important to promote the benefits of non-statutory services with our commissioners, in terms of early intervention, preventative support and building personal and community resilience.

In addition to supporting clients to find resolutions to issues, clients tell us that receiving advocacy support enables them to feel more empowered, take control of their lives and the learning of self-advocacy skills and approaches assists them in their future lives.

Financial Review, Reserves and Investment Policy

Details of Swan Advocacy's activities in 2024-25 is shown in the statement of financial activities on page 26.

The charity continues to grow sustainably by winning new business and retaining existing contracts through the delivery of high-quality, effective, and value-for-money services. All new tenders are subject to financial sustainability and risk assessment before submission to ensure that activities undertaken are viable and aligned with the charity's strategic objectives.

The Board has reviewed the charity's requirement for reserves, in light of the principal risks facing the organisation. These include the potential financial impact of a sudden loss of contract income and the need to maintain sufficient cash flow to support ongoing operations and protect employees.

The Board has determined that the total free unrestricted reserves should, at any point in time, be sufficient to cover approximately three months of forecast running costs. This level is considered appropriate to provide financial resilience, ensure operational continuity, and allow for contingencies. Forecast running costs will be based on expected future running costs pro-rated, three months forecast running costs for 2025/26 total £688,653 (2024/25: £770,473). Free unrestricted reserves are defined as unrestricted reserves less the value of any fixed assets, at the year end free reserves totalled £989,235 (2024: £798,924). Free reserves at the year end are higher than approximately three months of forecast running costs due to a large unexpected donation in the year of £107,360 and with a deficit forecast for the 2024/25 year, it was decided to retain excess reserves.

Financial performance and reserves levels are monitored through monthly forecasting and budget reviews, which assess both current reserves and projected cash flows. Annual budgets are prepared based on contractual commitments, historic cost trends, and anticipated changes such as inflation and regulatory updates (e.g., National Living Wage adjustments). Monthly management reports compare actual performance against budget, supporting effective financial control and informed decision-making by the Board and senior management.

The Reserves Policy is reviewed annually to ensure it remains appropriate, reflecting the charity's risk profile, operational requirements, and growth ambitions.

Swan Advocacy holds cash in excess of working capital required within our CAF gold account. The amounts of interest earned during the year was £13,691 (2024 - £8,721). Our investment policy is such that we ensure that our excess working capital is available for use at all times.

Swan Advocacy Network
Report of the Trustees
For the year ended 31 March 2025

Trustees' Responsibilities

The trustees (who are also directors of Swan Advocacy Network for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the directors' report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

Company law 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 charitable company and of the income and expenditure, of the charitable company for that period.

In preparing those 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 United Kingdom accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charitable charity will continue in business.

The trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware; and
- the Trustees have taken all the steps they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

Signed on behalf of the Trustees

Claire Tough
Chair of Trustees

Matthew Wall
Trustee

Swan Advocacy Network

Independent Auditors' Report to the Trustees of SWAN Advocacy Network For the year ended 31 March 2025

Opinion

We have audited the financial statements of Swan Advocacy Network ("the charitable company") for the year ended 31 March 2025 which comprise Statement of Financial Activities, the Balance Sheet, the Statement of Cash Flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2025 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Charities Act 2011.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on Swan Advocacy Network's ability to continue as a going concern for a period of at least 12 months from when the financial statements are authorised for issue.

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

Other information

The other information comprises the information included in the annual report, including the trustees' report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Swan Advocacy Network

Independent Auditors' Report to the Trustees of SWAN Advocacy Network For the year ended 31 March 2025

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees' Annual Report.

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 require us to report to you if, in our opinion;

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us;
- the financial statements are not in agreement with the accounting records and returns;
- certain disclosures of trustees' remuneration specified by law are not made, or
- we have not received all the information and explanations we require for our audit.

Responsibilities of the Trustees

As explained more fully in the Trustees' Responsibilities, the Trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as they determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the company or to cease operations, or have no realistic alternative but to do so.

Auditors' responsibilities for the audit of the financial statements

We have been appointed auditors under Section 144 of the Charities Act 2011 and report in accordance with the Act and relevant regulations made or having effect thereunder.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

Identifying and assessing potential risks of material misstatement due to irregularities

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- the legal and regulatory framework in which the charitable company operates
- the sector in which the charitable company operates
- the control environment and controls established to mitigate such risks
- the results of our enquiries of management about their identification and assessment of risks of irregularities

Swan Advocacy Network

Independent Auditors Report to the Trustees of SWAN Advocacy Network For the year ended 31 March 2025

- discussions with the audit engagement team about where fraud might occur
- the incentives for fraud.

Laws and regulations which are considered to be significant to the charitable company include those relating to the requirements of financial reporting framework FRS102, the Companies Act 2006, the Charities Act 2011, UK tax legislation, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the charitable company.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

Audit responses to risks identified

We undertook audit procedures to respond to the risks identified, and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- gaining an understanding of the charitable company's procedures for ensuring compliance with laws and regulations
- testing the appropriateness of journal entries and other adjustments
- considering whether accounting estimates were indicative of potential bias
- considering whether any transactions arose outside the normal course of business
- making enquiries of management
- corroborating our enquiries through review of Board Minutes and correspondence.

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities.

This description forms part of our auditor's report.

A C Mole LLP is eligible for appointment as auditor of the charitable company by virtue of its eligibility for appointment auditor of a company under section 1212 of the Companies Act 2006.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with part 4 of the Charities (Accounts and Reports) Regulations 2008. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

A C Mole LLP
Chartered Accountants and Statutory Auditor
Stafford House
Blackbrook Park Avenue
Taunton
Somerset TA1 2PX

Date:

Swan Advocacy Network

Statement of Financial Activities (Incorporating the Income and Expenditure Account) for the Year Ended 31 March 2025

	Notes	Unrestricted Funds £	Restricted Funds £	Total Funds 2025 £	Total Funds 2024 £
Income from:					
Donations and legacies		109,601	-	109,601	155
Charitable activities:					
Revenue contracts and grants	3	2,754,826	-	2,754,826	2,663,081
Fee income		278,483	-	278,483	273,667
Investment income	2	13,691	-	13,691	8,721
Other income		3,744	-	3,744	12,021
Total income		3,160,345	-	3,160,345	2,957,645
Expenditure on:					
Charitable activities	4	2,976,912	-	2,976,912	2,807,006
Total expenditure		2,976,912	-	2,976,912	2,807,006
Net income and Net movement in funds		183,433	-	183,433	150,639
Reconciliation of funds					
Total funds at 1 April 2024		819,784	-	819,784	669,145
Total funds at 31 March 2025	11	1,003,217	-	1,003,217	819,784

All of the charity's operations are classed as continuing. The charity has no recognised surpluses or deficits other than the net income for the year. The movement on reserves is shown above.

The notes shown on pages 29 to 37 form part of these financial statements.

Swan Advocacy Network

Registered Company Number: 06599429

Balance Sheet as at 31 March 2025

	Notes	31 March 2025		31 March 2024	
		£	£	£	£
Fixed Assets					
Tangible assets	6		13,982		20,860
Investments	7		<u>1</u>		<u>1</u>
			13,983		20,861
Current Assets					
Debtors	8	418,884		446,192	
Cash at bank and in hand		<u>641,143</u>		<u>436,690</u>	
		1,060,027		882,882	
Creditors					
Amounts falling due within one year	9	<u>70,793</u>		<u>83,959</u>	
		70,793		83,959	
Net Current Assets			<u>989,234</u>		<u>798,923</u>
Total Assets Less Current Liabilities			<u>1,003,217</u>		<u>819,784</u>
The Funds of the Charity:					
Unrestricted Funds	11		<u>1,003,217</u>		<u>819,784</u>
Total Charity Funds	11		<u>1,003,217</u>		<u>819,784</u>

For the year in question, the charitable company was entitled to exemption from an audit under section 477 of the Companies Act 2006.

The members have not required the charitable company to obtain an audit of its accounts for the year in question in accorded with section 476 of the Act.

The trustees/directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting reports and the preparation of accounts.

These accounts have been prepared in accordance with the provisions of part 15 of the Companies Act 2006 relating to the small companies' regime.

The financial statements were approved by the Trustees and signed their behalf by:

Claire Tough
Chair of Trustees

Matthew Wall
Trustee

Date:

The notes shown on pages 29 to 37 form part of these financial statements.

Swan Advocacy Network

Statement of Cash Flows
for the Year Ended 31 March 2025

	Notes	31 March 2025 £	31 March 2024 £
Cash flows from operating activities			
Net cash provided by operating activities	15a	197,328	20,032
Cash flows from investing activities			
Interest from investments		13,691	8,721
Purchase of equipment		(6,566)	(24,360)
Net cash provided by / (used in) investing activities		<u>7,125</u>	<u>(15,639)</u>
Change in cash in the reporting period		<u>204,453</u>	<u>4,393</u>
Cash at the beginning of the reporting period		436,690	432,297
Cash at the end of the reporting period	15b	<u><u>641,143</u></u>	<u><u>436,690</u></u>

The notes shown on pages 29 to 37 form part of these financial statements.

Swan Advocacy Network

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

1. Accounting Policies

a. Accounting convention

The financial statements have been prepared in accordance with 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) (issued October 2019) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102) and the Charities Act 2011. The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes.

b. Public benefit entity

Swan Advocacy meets the FRS102 definition of a public benefit entity.

c. Going concern

The financial statements have been prepared on a going concern basis as the trustees consider that the charity has adequate resources to continue in operational existence for the foreseeable future.

d. Income

i) Voluntary income

Voluntary income received by way of donations and gifts is included in full in the Statement of Financial Activities ("SOFA") when received.

ii) Revenue contracts and grants

Revenue grants are recognised in the period in which they are receivable. Contract income is recognised in the period in which it is receivable and when the contract service has been provided. Contract income received in advance is deferred.

e. Expenditure

The charity's cost of operating includes staff costs, rent and other related costs. Such costs are allocated between charitable activities, fundraising and support costs. All costs are accounted for on an accruals basis. Costs include attributable VAT which cannot be recovered.

Costs are allocated to different activities on the basis of staff time spent in each type of activity.

f. Pension costs

The charity contributes amounts between 3% and 6% of salary to individual personal pension arrangements for members of staff. The pension cost represents the employer contributions payable by the charity to these funds.

g. Tangible fixed assets

Fixed assets are capitalised and depreciated over their estimated useful lives. The rates applicable are as follows:

- Office Equipment 20% on cost
- Computer Equipment 33% on cost

Fixed assets are reviewed for impairment if evidence comes to light that the recoverable amount of a functional fixed asset is below its net book value.

h. Leases

Rentals payable under operating leases are taken to the statement of income and expenditure on a straight-line basis over the lease term.

Swan Advocacy Network

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

1. Accounting Policies (Continued)

i. Funds

The charity maintains various types of funds as follows:

- Restricted funds are those which are used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes.
- Unrestricted funds are funds which are expendable at the discretion of Trustees in furtherance of the objects of the charity.
- Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

j. Debtors

Debtors are measured at the amounts the charity anticipates it will receive from a debt. Prepayments are valued at the amount prepaid.

k. Cash at bank and in hand

Cash at bank and in hand includes cash and cash on deposit.

l. Creditors

Creditors are recognised when the charity has an obligation to transfer economic benefits to a third party. Creditors are usually recognised at their settlement amount or the amount received as an advance payment for goods or services it must provide.

m. Financial Instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

n. Consolidated financial statements

The financial statements are single entity accounts. The charity is exempt from the requirement to prepare group accounts as the subsidiary company is currently dormant.

2. Investment Income

	Total 2025 £	Total 2024 £
Bank and other interest receivable	13,691	8,721

3. Income: Revenue Contracts and Grants

	Unrestricted Funds £	Restricted Funds £	Total 2025 £	Total 2024 £
Contracts	2,754,826	-	2,754,826	2,639,616
Grants	-	-	-	23,465
	2,754,826	-	2,754,826	2,663,081

Swan Advocacy Network

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

4. Expenditure

	Staff Costs	Other Costs	Depreciation	Total 2025	Total 2024
	£	£	£	£	£
Charitable Activities	2,590,769	372,699	13,444	2,976,912	2,807,006
Total Expenditure	2,590,769	372,699	13,444	2,976,912	2,807,006

In 2024 the analysis was £2,454,948 staff costs, £332,331 other costs and £19,727 depreciation.

Expenditure is stated after charging:

	2025	2024
	£	£
Depreciation	13,444	19,727
Trustee indemnity insurance	771	527
Audit fee	5,880	5,640
Operating lease rentals - property	30,890	14,514

Staff costs:

	2025	2024
	£	£
Wages and salaries	2,166,247	1,974,428
Social security costs	165,922	152,165
Pension costs	110,889	101,853
Travel	132,646	123,085
Recruitment and training	15,065	87,354
Redundancy	-	16,063
	2,590,769	2,454,948

Analysis of governance and support costs

	Staff costs	Other costs	Governance	Total
	£	£	£	£
Wages and salaries	2,590,769	-	6,343	2,597,112
General office costs	-	373,920	-	373,920
External audit and accountancy fees	-	-	5,880	5,880
	2,590,769	373,920	12,223	2,976,912

The charity identifies the costs of its support function and governance.

Wages and salaries are allocated to specific activities on the basis of time.

General office costs are either allocated directly to specific activities or apportioned on the basis of time.

Support costs and governance activities are ultimately apportioned across the fundraising and publicity activities and charitable activities.

The key management personnel of the charity comprise the trustees, Chief Executive, Director of Operations, Director of Income Generation and Director of Finance and Central service. The total employee benefits of the key management personnel is £166,171 (2024: £152,972). Trustees are not remunerated for their services as Trustees.

Swan Advocacy Network

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

4. Expenditure (continued)

The average monthly number of employees (employee head count) during the period was 109 (2024: 102).

Employees are involved in advocacy work, management, administration and fundraising.

The number of employees whose annual emoluments were £60,000 or more were:

	2025	2024
£60,000 - £69,999	1	-

In addition to the employed staff SWAN is dependent on volunteer advocates to provide its service during the year. Volunteers undertake a variety of roles within Swan Advocacy and contribute their time, skills and experience for the benefit of the organisation and its beneficiaries. Primarily volunteers are advocates supporting clients on a 121 basis to resolve their particular issues and ensure their rights are protected and their voices heard. Volunteers also undertake other tasks such as administration, marketing and fundraising. Volunteers add significant value to the services delivered by Swan and enrich the organisation through their diverse skills, experiences and interests.

No Trustee received any remuneration for services as a Trustee (2024: none). Travel and meeting expenses for 1 Trustees of £89 (2024: 2 Trustees - £365) were reimbursed during the year.

No Trustee or other person related to the charity had any personal interest in any contract or transaction entered into by the charity during this period (2024: none).

The charity paid pension contributions to a range of personal pension funds on behalf of staff members. All of these schemes are defined contribution schemes where both the employer and the employee make contributions. At the year end contributions of £21,866 (2024: £24,276) were unpaid.

5. Taxation

SWAN Advocacy Network is a registered charity and as such is not liable for taxation on any surplus from its charitable activities.

6. Fixed Assets

	Office Equipment £	Computer Equipment £	Total £
Cost			
At 1 April 2024	16,277	117,012	133,289
Additions	-	6,566	6,566
Disposals	(8,871)	(58,056)	(66,927)
At 31 March 2025	<u>7,406</u>	<u>65,522</u>	<u>72,928</u>
Depreciation			
At 1 April 2024	13,943	98,486	112,429
Charge for year	846	12,598	13,444
Disposals	(8,871)	(58,056)	(66,927)
At 31 March 2025	<u>5,918</u>	<u>53,028</u>	<u>58,946</u>
Net Book Value			
At 31 March 2025	<u>1,488</u>	<u>12,494</u>	<u>13,982</u>
At 31 March 2024	<u>2,334</u>	<u>18,526</u>	<u>20,860</u>

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

7. Investments

	2025	2024
	£	£
Investment in subsidiary	1	1
	<u>1</u>	<u>1</u>

The subsidiary company, Swan Training Services Limited, has never traded and is dormant. It has assets of £1, being 1 £1 ordinary share.

8. Debtors

	2025	2024
	£	£
Trade debtors	414,330	436,207
Prepayments and accrued income	4,554	9,985
	<u>418,884</u>	<u>446,192</u>

9. Creditors: Amounts falling due within one year

	2025	2024
	£	£
Trade creditors	10,178	14,925
Other tax and social security costs (including pensions)	54,315	62,050
Accruals	6,300	6,984
	<u>70,793</u>	<u>83,959</u>

10. Operating leases

The charity has total commitments under operating leases expiring as follows:

	2025	Premises 2024
Less than 1 year	£8,000	£25,834
1 to 5 years	£22,667	£35,722

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

11. Description of Funds

	As at 1 April 2024 £	Income £	Expenditure £	Transfers £	As at 31 March 2025 £
Unrestricted Funds	819,784	3,160,345	(2,976,912)	-	1,003,217
Total Funds	<u>819,784</u>	<u>3,160,345</u>	<u>(2,976,912)</u>	<u>-</u>	<u>1,003,217</u>

Unrestricted Funds

The unrestricted funds comprise the accumulated surpluses and deficits which have neither been restricted by conditions imposed by donors, nor have been designated by the trustees for specific purposes.

12. Description of Funds - Comparative year ended 31 March 2024

	As at 1 April 2023 £	Income £	Expenditure £	Transfers £	As at 31 March 2024 £
Restricted Funds					
Autism Advocacy Project	-	23,465	(23,465)	-	-
Total Restricted Funds	<u>-</u>	<u>23,465</u>	<u>(23,465)</u>	<u>-</u>	<u>-</u>
Unrestricted Funds	669,145	2,934,180	(2,783,541)	-	819,784
Total Funds	<u>669,145</u>	<u>2,957,645</u>	<u>(2,807,006)</u>	<u>-</u>	<u>819,784</u>

Restricted Funds

Autism Advocacy project

SWAN received funding from the Open Mental Health Grant. This funded the Somerset Autism Advocacy project. This project provides a 1:1 advocacy provision to individuals with Autism using an empowerment and self-advocacy model.

Unrestricted Funds

The unrestricted funds comprise the accumulated surpluses and deficits which have neither been restricted by conditions imposed by donors, nor have been designated by the trustees for specific purposes.

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

13. Analysis of Net Assets between Funds

Fund balances as at 31 March 2025 are represented by:

	Unrestricted Funds £	Restricted Funds £	Total 2025 £
Fixed Assets	13,983	-	13,983
Current Assets	1,060,027	-	1,060,027
Creditors: amounts falling due within one year	(70,793)	-	(70,793)
	<u>1,003,217</u>	<u>-</u>	<u>1,003,217</u>

Fund balances as at 31 March 2024 are represented by:

	Unrestricted Funds £	Restricted Funds £	Total 2024 £
Fixed Assets	20,861	-	20,861
Current Assets	882,882	-	882,882
Creditors: amounts falling due within one year	(83,959)	-	(83,959)
	<u>819,784</u>	<u>-</u>	<u>819,784</u>

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

14. Statement of Financial Activities - Comparative year ended 31 March 2024

	Notes	Unrestricted Funds £	Restricted Funds £	Total Funds 2024 £	Total Funds 2023 £
Income from:					
Donations and legacies		155	-	155	42
Charitable activities:					
Revenue contracts and grants		2,639,616	23,465	2,663,081	1,863,063
Fee income		273,667	-	273,667	184,704
Investment income		8,721	-	8,721	2,931
Other income		12,021	-	12,021	1,875
Total income		2,934,180	23,465	2,957,645	2,052,615
Expenditure on:					
Charitable activities		2,783,541	23,465	2,807,006	2,009,347
Total expenditure		2,783,541	23,465	2,807,006	2,009,347
Net income and Net movement in funds		150,639	-	150,639	43,268
Reconciliation of funds					
Total funds at 1 April 2023		669,145	-	669,145	625,877
Total funds at 31 March 2024		819,784	-	819,784	669,145

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

15. Notes to the cash flow statement

a. Reconciliation of net income to net cash flow from operating activities

	31 March 2025	31 March 2024
Net income for the reporting period as per the Statement of Financial Activities	183,433	150,639
Adjustments for:		
Depreciation	13,444	19,726
Interest from investments	(13,691)	(8,721)
Decrease / (increase) in debtors	27,308	(175,156)
Increase / (decrease) in creditors	(13,166)	33,544
Net cash provided by operating activities	<u>197,328</u>	<u>20,032</u>

b. Reconciliation of net cashflow to movement in net funds

	31 March 2025	31 March 2024
Increase in cash in the period	204,453	819,784
Cash and cash equivalents at 1 April 2024	436,690	432,297
Cash and cash equivalents at 31 March 2025	<u>641,143</u>	<u>1,252,081</u>

c. Analysis of net funds

	Balance 1 April 2024	Cash flow	Balance 31 March 2025
Cash at bank and in hand	436,690	204,453	641,143
	<u>436,690</u>	<u>204,453</u>	<u>641,143</u>