

ADVOCACY MATTERS LTD

England & Wales · Charity number 1148198

Details

Other names	ADVOCACY MATTERS
Status	Registered
Legal form	Charitable company
Company number	07987156
Registered	2012-07-19
Register	View on the Charity Commission register

Contact

Address	Advocacy Matters 198 Boldmere Road Sutton Coldfield B73 5UE
Phone	01213212377
Email	info@advocacymatters.co.uk
Website	www.advocacymatters.co.uk

Activities

Objects: 1. TO PROMOTE THE RELIEF OF THE PHYSICAL AND MENTAL SICKNESS OF PERSONS IN NEED BY REASON OF ADDICTION, BEREAVEMENT OR LOSS, AND TO PROMOTE SOCIAL INCLUSION FOR THE PUBLIC BENEFIT BY PREVENTING PEOPLE FROM BECOMING SOCIALLY EXCLUDED, RELIEVING THE NEEDS OF THOSE PEOPLE, WHO ARE SOCIALLY EXCLUDED, ASSISTING THEM TO INTEGRATE INTO SOCIETY AND IMPROVING THEIR CONDITIONS OF LIFE, BY THE PROVISION OF AN ADVOCACY SERVICE IN THE COUNTIES OF WEST MIDLANDS, WARWICKSHIRE, WORCESTERSHIRE, STAFFORDSHIRE AND HEREFORDSHIRE WITH THE OBJECT OF IMPROVING THEIR CONDITIONS OF LIFE.FOR THE PURPOSE OF THIS CLAUSE, 'SOCIALLY EXCLUDED' MEANS BEING EXCLUDED FROM SOCIETY OR PARTS OF SOCIETY AS A RESULT OF ONE OR MORE OF THE FOLLOWING FACTORS: UNEMPLOYMENT; FINANCIAL HARDSHIP; YOUTH AND OLD AGE; ILL HEALTH, (PHYSICAL OR MENTAL); SUBSTANCE ABUSE OR DEPENDENCY, INCLUDING ALCOHOL AND DRUGS, DISCRIMINATION ON THE GROUNDS OF SEX, RACE, DISABILITY, ETHNIC ORIGIN, RELIGION, BELIEF, CREED, SEXUAL ORIENTATION, GENDER REASSIGNMENT; POOR EDUCATION OR SKILLS ATTAINMENT; RELATIONSHIP AND FAMILY BREAKDOWN; POOR HOUSING (THAT IS HOUSING THAT DOES NOT MEET BASIC HABITABLE STANDARDS); CRIME (IE. EITHER AS A VICTIM OF CRIME OR AS AN OFFENDER REHABILITATING INTO SOCIETY).2. TO ADVANCE EDUCATION IN PARTICULAR TRAINING IN ADVOCACY SKILLS AND DISABILITY ISSUES THROUGHOUT THE UK

Activities: Provision of Advocacy for vulnerable people.

Classification

- **How:** Provides Human Resources, Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Accommodation/housing, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** Children/young People, Elderly/old People, People With Disabilities

Geography

- Birmingham City
- Walsall

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£659,210	£623,060	£725,055	20
2024-03-31	£758,026	£660,645	£688,905	21
2023-03-31	£550,389	£657,077	£591,524	21
2022-03-31	£674,077	£479,495	£584,133	18
2021-03-31	£572,747	£413,128	£389,551	18

Trustees

Name	Role	Appointed
JENNY STECKLES	Chair	2012-07-17
GORDON LAW		2012-07-17
Naomi Campbell		2026-01-15
Robert Netherway		2020-01-23
Robert Punton		2023-01-19
Tharanjit Biring		2024-08-01

ADVOCACY MATTERS LTD

England & Wales - Charity number 1148198

Accounts

Charity registration number 1148198 (England and Wales)

Company registration number 07987156

ADVOCACY MATTERS LTD
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025

ADVOCACY MATTERS LTD

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Mrs J A Steckles - Chair Mr R Punton Mr R Netherway Mr Gordon Law Mr L Campbell Mrs Tharanjit Biring	(Appointed 9 May 2024)
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Charity number (England and Wales)	1148198
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Company number	07987156
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Registered office	198 Boldmere Road Sutton Coldfield West Midlands B73 5UE
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Independent examiner	Jerroms Lumaneri House Blythe Gate Blythe Valley Park Solihull West Midlands B90 8AH
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ADVOCACY MATTERS LTD

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ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE YEAR ENDED 31 MARCH 2025

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

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's governing document, the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" and the Charities SORP "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)".

Objectives and activities

The objects of the charity as set out in its Articles of Association are:

1. To promote the relief of the physical and mental sickness of persons in need by reason of addiction, bereavement or loss, and to promote social inclusion for the public benefit by preventing people from becoming socially excluded, relieving the needs of those people who are socially excluded, assisting them to integrate into society with the object of improving their conditions of life by the provision of an advocacy service in the counties of the West Midlands, Warwickshire, Worcestershire, Staffordshire and Herefordshire or elsewhere in England and Wales, where need is identified, and additional support with the object of improving their conditions of life.

For the purpose of this clause, 'socially excluded' means being excluded from society or parts of society as a result of one or more of the following factors: unemployment; financial hardship; youth and old age; ill health, (physical or mental); substance abuse or dependency, including alcohol and drugs; discrimination on the grounds of sex, race, disability, ethnic origin, religion, belief, creed, sexual orientation, gender reassignment, poor education or skills attainment; relationship and family breakdown; poor housing (that is housing that does not meet basic habitable standards); crime (i.e. either as a victim of crime or as an offender rehabilitating into society).

2. To advance education, in particular training in advocacy skills and disability issues, throughout the UK.

In support of these objects, the charity will provide advocacy to all disabled people although the requirements of funders may restrict either the geographical area or type of disability for projects.

When projects are first established, great care is taken to ensure that they are consistent with the aims and objectives of the charity and the trustees consider the Charity Commission's general guidance on public benefit. Each advocacy case is also reviewed regularly by management in supervision with the advocate responsible to ensure that these requirements continue to be met.

The advocacy provided is independent and is not subject to the direction or approval of the funder. Funds available and advocates' time will also restrict the numbers to whom advocacy can be provided. Subject to these limits, the projects are for the benefit of all members of the disabled community irrespective of ethnicity, gender or sexuality and advocacy is provided without charge to the recipient. Referrals are dealt with dependent on need, where a crisis situation or other complex issues may require immediate action.

Each project is reviewed annually to ensure that it continues to reflect the charity objectives and has delivered benefits to the group of people the project was set up to help.

Mission Statement

To provide Disabled People with an independent advocate to ensure individuals are heard and their rights, concerns and needs are acted upon.

Public benefit

The Trustees have paid due regard to guidance issued by the Charity Commission in deciding what activities the Charity should undertake.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

Achievements and performance

Significant activities and achievements against objectives

The surge in demand following the pandemic has continued with waiting lists being a necessity for non-statutory advocacy referrals. With many facing issues with mental health as a direct result of isolation in lockdowns. Service users have also been in financial hardship due to the cost-of-living crisis, many needing support to access food bank services and support to pay their utilities.

Birmingham City Council issued a section 114 notice on September 5, 2023, which means it has halted all spending except on essential services such as schooling, housing, social care, waste collection and road maintenance. This has directly impacted the finances of Advocacy Matters with a cut to the hourly rate paid to us by BCC. It has also adversely affected the citizens we support with the potential for service provision being cut to disabled people. This has also created a larger demand for advocacy support.

Recruitment has not been an issue in the last financial year, and we remain fully staffed to meet the needs of all contracts and projects. Safeguarding issues remain prevalent within all projects. We continue to support advocacy partners in increasing situations of abuse. Whilst these cases have resulted in the greater awareness of such problems and have also resulted in the improvement of safeguarding procedures and in the scrutiny of care providers, progress has been frustratingly slow, and the demand never decreases. Incidents such as these, which can often lead to protracted investigations, emphasise the need for greater diligence and the importance of independent advocacy.

As a result of the independent advocacy provided by Advocacy Matters, care provision and financial arrangements are often challenged, enabling individuals to be heard who might not otherwise have a voice and control.

In January 2024 Advocacy Matters hosted our second social work student placement from Birmingham University. Riya is studying to be a social worker and was in her first year. She is bright and engaging and has added a lively addition to the team until her placement ends in May 2025.

Advocacy Matters were awarded the QPM in July 2023 for 3 years. We will need to begin the process of renewal in October 2025.

Advocacy Matters office refurbishment started in February 2023 and was finished March 2023. The new office continues to be used regularly for training and community groups. We host the Sutton Coldfield Neighbourhood Network Scheme (NNS) and groups from Age Concern.

On 18th April 2024 we had a staff team awayday at the National Arboretum Staffordshire. We had team building exercises and wellbeing activities. This was a welcome reward to the staff team after a year of very hard work and high caseloads.

In June 2024 we held our second Volunteer Pamper Day to coincide with volunteer's week. We held this event at the local methodist hall as a thank you to all our dedicated volunteers. Volunteers and wider members of the public came along and experienced alternative therapies, such as hand massage, gong washing and mindfulness and music. There was also seated yoga for those that could participate.

In September 2024 due to the reduction in funding and hours on the Birmingham Project we began to take some spot purchase work from Birmingham and Solihull ICB. This work was to provide the 1.2 Rep role to individuals deprived of their liberty in their own homes.

October 2024 saw the beginning of our city-wide befriending offer. We have been able to develop and grow the new project with the support of our volunteers and have been providing befriending support and engaging activities to older adults without family living in care home settings. This has been funded for three years by The National Lottery Community fund. We launched this project in the office in our training room on the 18th of October 2024, this was well attended. People and older adults attending got to try some of our befriending activities, such as flower arranging, ceramic painting and paint by numbers.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

Advocacy Matters Projects

The following is a brief review for the period of each of the major projects run and supported by Advocacy Matters.

1. My Side: Volunteer Advocacy and Befriending Matters

The trustees consider this type of project and particularly the training and employment of volunteers to be a fundamental part of the DNA of Advocacy Matters and have agreed to continue to fund a proportion of the project from Unrestricted Funds but with reduced numbers and mainly by trained Volunteers.

We continue to provide a range of services within our My Side project including 1:1 independent advocacy, group work, training to volunteers, user involvement, engagement and participation, befriending, admin opportunities, support and supervision, development and promotional work. We provide our advocacy support across Birmingham and Walsall, and our befriending support is now offered Birmingham city wide with thanks to the Big Lottery which commenced in October 2024.

During this financial year we have trained and supported new volunteers through face-to-face sessions in the office and through virtual ways via Microsoft Teams. Our Volunteer Co-Ordinator has supported new and longstanding existing volunteers to provide a range of invaluable roles within the organisation. We have had a core team of 56 volunteers covering Trustee roles, Steering Group, Volunteer Advocates, Volunteer Befrienders, Admin support and Fundraising support. Through Volunteer Advocacy we have been able to provide 1:1 crisis advocacy to 54 individuals.

There is still a clear demand for non-statutory advocacy work in Birmingham and Walsall, and we continue to receive referrals for Volunteer Advocacy through our own channels within the organisation such as the website, telephone and email and also undertake a proportion of the non-statutory work on the Birmingham Advocacy project in which we are a partner with POHWER.

Befriending Matters (falling under My Side)

This year we have been able to grow our pilot befriending project to now cover the whole of the city of Birmingham. We have been providing volunteers to offer befriending support and engaging activities to older adults without family living in care home settings. During the year we have provided this support and friendship to 47 individuals.

The Steering Group

This is an important part of this project and provides input into the charity's governance from all areas of Birmingham and Walsall. It functions to provide former and current advocacy partners with the opportunity to access peer advocacy as well as develop self-advocacy skills. The purpose of the group is to address common barriers that prevent people accessing facilities in their local communities. Members are actively involved in such matters as the interviewing of all new staff, the provision of advice as to what accessible information should be provided by the charity, the design and content of the accessible information documentation produced and in contributing to the development of future projects for which the charity applies for funding.

Through the facilitation of our Steering Group who now totals 12 individuals all of whom have at some point experienced receiving Independent Advocacy and who can guide and steer our organisation to ensure we are able to provide what is most needed in our communities. During this time period that Steering Group has engaged in a range of consultations with external services to provide service user voice including with Healthwatch, Mencap Capturing Change, West Midlands Police and Energy providers.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

In this financial year we have received grants from 29th May and the Big Lottery.

2. Physical Disability Advocacy

PD Advocacy is funded by Birmingham Solihull Integrated Care Board and continues to be renewed and receive positive praise from commissioning about its impact and scope. We provide 1:1 Independent Advocacy for people living with the effects of Stroke, brain injury, neurological conditions, long term chronic conditions and the wider experiences of living with a physical disability. We have continued to find good engagement from commissioning contacts and meet quarterly. Work is being done to improve the scope of recording for the project to reflect the in-depth work by the Independent Advocate. We have seen a huge rise in the instances of housing issues and homelessness on this project and continue to support to resolve these which can be challenging and time consuming. During the period we have supported 63 people.

3. Walsall Care Act

The nature and scope of this project is the same as that of the Birmingham Care Act Advocacy project, see 4 below, albeit on a smaller scale. The arrangement was direct with Walsall Metropolitan Borough Council up until October 2022. Since October 2022 we have been providing this Care Act Service in a partnership with POHWER. April 2024 until 31st March 2025 support was provided for 280 individuals.

4. Birmingham Advocacy Hub

Birmingham City Council issued a tender encompassing not only statutory advocacy but also a pre-defined amount of non-statutory advocacy and volunteer training. This project was awarded to POHWER, a national advocacy provider. Advocacy Matters entered into a partnership agreement with POHWER to provide Advocacy Services on an agreed basis. This project commenced on 1st April 2019. It was retendered and re-won in April 2022 and will be contracted until April 2027. This Partnership is of critical importance to Advocacy Matters. It incorporated the Care Act, IMCA, and a part of the My Side projects. In addition, another statutory advocacy and some non-statutory advocacy is also included.

Birmingham City Council issued a section 114 notice on September 5th, 2023, which means it must halt all spending except on essential services such as schooling, housing, social care, waste collection and road maintenance. The council are planning to cut the hourly rate paid for this work from April 2024 which has not affected our continued inclusion in this work from April 2025. A summary of each of the elements of the project is given below.

Care Act Advocacy

Care Act Advocacy is a form of statutory Advocacy governed by the Care Act 2014 whereby local authorities must arrange an independent advocate to facilitate the involvement of a person in their assessment, in the preparation of their care and support plan, in the review of their care plan, and in appropriate safeguarding procedures. This independent advocacy must be implemented to provide assistance if the following two conditions are met:

- Where the potential recipient has substantial difficulty in being fully involved in these processes
- Where there is no one appropriate available to support and represent the person's wishes.

The role of the independent advocate is to support and represent the person and to facilitate their involvement in the key processes and interactions with the local authority. Acting as an advocate for a person who has substantial difficulty in engaging with care and support processes is a responsible position.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) **FOR THE YEAR ENDED 31 MARCH 2025**

This work includes: -

- Assisting a person to understand the assessment, the care and support planning and the review processes. This requires advocates to understand local authority policies and processes, the available assessment tools, the planning options and the options available at the review of a care or support plan. It may involve advocates spending considerable time with the individual, considering their communications needs, their wishes and feelings and their life story, and using all this to assist the person to be involved and where possible to make decisions.
- Assisting a person to communicate their views, wishes and feelings to the staff who are carrying out an assessment or developing a care or support plan or reviewing an existing plan.
- Assisting a person to understand how their needs can be met by the local authority or otherwise – understanding, for example, how a plan can be personalised, how it can be tailored to meet specific needs, how it can be creative and inclusive and how it can be used to promote a person's rights to liberty and to family life.
- Assisting the person to make decisions about their care and support arrangements – assisting them to weigh up various care and support options and to choose the ones that best meet the person's needs and wishes.
- Assisting the person to understand their rights under the Care Act – for an assessment which considers their wishes and feelings, and which considers the views of other people; their right to have their eligible needs met and to have a care or support plan that reflects their needs and their preferences. Also assisting the person to understand their wider rights, including their rights to liberty and family life. A person's rights are complemented by the local authority's duties, for example, to involve the person, to meet needs in a way that is least restrictive of a person's rights.
- Assisting a person to challenge a decision made by the local authority; and where a person cannot challenge the decision even with assistance, then

The Mental Capacity Act

The Mental Capacity Act came into force in April 2007 introducing statutory independent advocacy and imposing on the NHS and Local Authorities the duty to consult in defined situations concerning vulnerable individuals. IMCA requires the provision of non-instructed advocacy to individuals, aged 16 and over, who have been assessed to lack capacity for specific decisions and who have no family or friends who might otherwise advocate on their behalf.

This may include those with learning difficulties, dementia, mental health problems, acquired brain injury and cognitive impairments associated with serious physical illness.

IMCA is a very specialist form of advocacy and all advocates involved in this form of advocacy are required to undertake specialist training.

IMCA advocates will also be involved in any Safeguarding aspects related to Deprivation of Liberty (DoLs) under the Mental Capacity Act 2009.

Independent Mental Health Advocacy (IMHA)

IMHA is covered by Mental Health Act Revision 2007 and relates to inpatients held under a section of the Mental Health Act 1983.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

Independent Complaints Advocacy Service (ICAS)

National Health Complaints are the statutory responsibility of the National Health Service but these are commissioned through Public Health England and the local authority.

Community Advocacy

Community Advocacy applies to all issues that vulnerable people face which fall outside the above legislation.

Volunteer Advocacy Training

One of the forms of advocacy which Birmingham City Council are keen to support is advocacy by volunteers which they are promoting by supporting the training of potential new advocates.

1576 referrals were dealt with during the period and 4 training courses were held providing volunteer training for 60 participants.

5. Spot Purchase 1.2 Rep

A "1.2 representative" refers to a person appointed by the Court of Protection to represent someone who lacks the capacity to consent to restrictions on their freedom, particularly when a Deprivation of Liberty (DOLS) is being authorized in a community or domestic setting. This representative acts as an advocate for the individual, ensuring their views and wishes are considered in the legal process. We have been undertaking this work since September 2024 and have worked with 27 individuals in the financial year. Providing COP 11 Annex C and Cop 24 witness reports.

6. Children's Age Assessments

Appropriate Adult The age assessment of unaccompanied children seeking asylum is a challenging process and is there to establish if the individual will be supported as a child or adult. Often Children and young people seeking asylum do not have documentation with proof of age and sometimes are not aware of how old they are or their birthdate. A child or young person undergoing an age assessment must have the opportunity to have an appropriate adult present with them during the interviews. It is important that the role of the appropriate adult is clearly explained at the outset of the interviews, and it is recommended that the same appropriate adult is used throughout the age assessment. Advocacy Matters were awarded a contract to provide this service from Birmingham Children's Trust in January 2023. As in this financial period we have received 61 Referrals.

Financial review

The results for the year are set out in the attached Financial Statements and Notes. The net movement of funds for the period amounted to a surplus of £36,150. The total retained reserves at 31st March 2025 amounted to £725,055.

Reserves policy

It is the policy of the Charity that unrestricted funds which have not been designated for a specific use should be maintained at a level equivalent to between three and six month's expenditure. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the Charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

The trustees periodically review the reserves position of the charity to ascertain whether or not the funds that they are holding are adequate for its work. In doing this they take into consideration the financial risks to which the charity is subject, the assets and working capital requirements for continued service delivery and for unforeseen circumstances, particularly relating to uncertainties of future funding.

A further major consideration is the drastic change in the way that many projects are being funded. In many cases remuneration is on a per hour or per referral basis with payment in arrears with no guarantee of the number of referrals which will be required. This places all the risk on to the provider and could have a catastrophic effect on the charity's funds if things go wrong.

At 31 March 2025 the charity had reserves of £725,055. The trustees have reviewed whether unrestricted funds can be applied for public benefit whilst maintaining an appropriate level of free reserves. The trustees are of the opinion that free reserves (reserves available for working capital, development and provision of the service) should be at least six months costs of running the organisation. The trustees therefore consider that the free reserves are adequate.

Plans for future periods

The trustees will continue to seek new projects which are suitable and beneficial to the community of people with disabilities, which are consistent with the charity's aims and objectives and which deliver public benefit to all members of the community.

The reduction in funding from Local Authorities generally and the reluctance of other potential funders to fund non-statutory advocacy means that different approaches to fundraising are required if the charity is to remain sustainable with adequate levels of funding and this is now a priority which is being urgently addressed.

One of the Objects of the charity is to advance education, in particular by providing training in advocacy skills and disability issues. This training is now handled by the Volunteer Advocacy Training section of the Birmingham Advocacy Hub (see 4 above) and will continue to be a priority. A brief outline of the type of facilities which could be provided is available on the charity's website. This training will normally be provided to other advocacy organisations or health professionals to the ultimate public benefit of the disabled community.

Structure, governance and management

The Charity is a company limited by guarantee. The trustees/directors named on page 1 are also the only members of the company. In the event of the company being wound up, their liability in respect of the guarantee is limited to £1 each.

The charity was incorporated on 12th March 2012 and is governed by its Memorandum and Articles of Association. The company was formed specifically to take over the operations of Advocacy Matters, an unincorporated charity which has since been decommissioned. The company commenced operations on 1st October 2012 at which point any remaining assets or liabilities of the unincorporated charity were transferred to the company.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Mrs J A Steckles - Chair

Mr R Punton

Mr P Shergold

(Resigned 9 May 2024)

Mr R Netherway

Mr Gordon Law

Mr L Campbell

(Appointed 9 May 2024)

Mr S Watson

(Appointed 9 May 2024 and resigned 3 July 2025)

Mrs Tharanjit Biring

Recruitment and appointment of trustees

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) **FOR THE YEAR ENDED 31 MARCH 2025**

The charity is governed by an Executive Committee comprising all the Trustees who are also Directors and the only members of the company. During the year under review, the day-to-day management of the charity was undertaken by the Chief Executive Officer with the assistance of three Operations Managers and two Senior Advocates.

Where there is a requirement for a new trustee, candidates will normally be identified from recommendations by existing trustees or Operations Managers, particularly bearing in mind the skills and experience which such candidates would bring in areas which are beneficial to the charity but may not necessarily be represented by the existing trustees. Potential new trustees will usually be interviewed by the Chair and one of the Chief Executive who will explain the concept of advocacy and the aims and objectives of the charity. They are also informed of their legal obligations under charity and company law, the Charity Commission guidance on public benefit and are provided with leaflets from the Charity Commission so that they are aware of their roles and responsibilities before they decide to take on the role. Successful candidates are invited to attend the next trustees' meeting as observers and are provided with a copy of the Memorandum and Articles of Association.

New trustees are voted in by the Executive Committee and appointments are subject to Enhanced Disclosure and Barring Scheme checks. New trustees are provided with a trustee Induction Pack and offered Trustee training. Advocacy Training is available to ensure the new trustee is fully aware of the meaning of advocacy.

All members of the Executive Committee give their time voluntarily and do not receive any benefits from the charity. Note 7 to the accounts shows any expenses claimed by the Trustees during the period.

The Steering Group, which is incorporated into the My Side project, ensures that the charity remains "user led" and provides an important element of the charity's structure and governance.

Risk management

The Trustees continually assess the risks to which the charity and its staff are exposed. This has been more relevant than ever because of the potential dangers of COVID 19. Where appropriate, systems, policies and procedures have been implemented to reduce these risks. They cover areas such as health and safety of staff, volunteers and visitors and lone working for staff and volunteers. These policies and procedures are regularly reviewed to ensure they are up to date and cover all areas involving the charity. All staff and volunteer appointments are subject to Enhanced Disclosure and Barring Scheme checks and full training is given to safeguard not only the safety of staff and volunteers but also the users for whom they may be advocating. A written risk assessments are carried out for every disabled person who is to be supported by a member of staff or volunteer and is held on file.

Risk Assessments relating to the office are carried out annually and Health and Safety is included on the Agenda of Staff Meetings.

Financial Risk is a major consideration for a small charity and liquid funds and reserves are regularly reviewed to ensure that there is sufficient working capital for the charity's needs. This includes the ability to finance the expenditure for those projects where payment for services is made in arrears.

Pay policy

The trustees consider the Chief Executive Officer and the three Operations Managers to be key management personnel but the pay policy for these key personnel is the same as for other staff. The pay of all staff is reviewed annually and will normally be increased in line with, or above, average earnings benchmarked against similar roles at other charities or the public sector, with a view to ensuring that they are paid at least as well as those benchmarks.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) **FOR THE YEAR ENDED 31 MARCH 2025**

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



Mrs J A Steckles - Chair
Chair of Trustees

22 July 2025

ADVOCACY MATTERS LTD

STATEMENT OF TRUSTEES' RESPONSIBILITIES

FOR THE YEAR ENDED 31 MARCH 2025

The Trustees, who are also the directors of Advocacy Matters Ltd for the purpose of company law, are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (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 Charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the Trustees are required to:

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

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

Insofar as the trustees are aware:

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

The strategic report under the Companies Act 2006 (Strategic Report and Directors' Report) Regulations 2013 is not required as the charity qualifies as a small charitable company.

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 Charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
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- make judgements and estimates that are reasonable and prudent;
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ADVOCACY MATTERS LTD

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF ADVOCACY MATTERS LTD

I report to the Trustees on my examination of the financial statements of Advocacy Matters Ltd (the Charity) for the year ended 31 March 2025.

Responsibilities and basis of report

As the Trustees of the Charity (and also its directors for the purposes of company law), you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006.

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

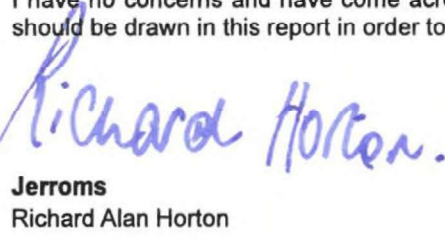
Independent examiner's statement

Since the Charity's gross income exceeded £250,000, the independent examiner must be a member of a body listed in section 145 of the Charities Act 2011. I confirm that I am qualified to undertake the examination because I am a member of the 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 that in any material respect:

- 1 accounting records were not kept in respect of the Charity as required by section 386 of the Companies Act 2006.
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of section 396 of the Companies Act 2006 other than any requirement that the financial statements give a true and fair view, which is not a matter considered as part of an independent examination; or
- 4 the financial statements 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 financial statements 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 financial statements to be reached.



Jerroms

Richard Alan Horton

Chartered Certified Accountant

Lumaneri House

Blythe Gate

Blythe Valley Park

Solihull

West Midlands

B90 8AH

22 July 2025

ADVOCACY MATTERS LTD

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2025

		Unrestricted funds 2025 £	Restricted funds 2025 £	Total 2025 £	Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £
	Notes						
Income from:							
Donations and legacies	3	298	-	298	570	-	570
Charitable activities	4	627,696	23,900	651,596	748,568	-	748,568
Investments	5	7,316	-	7,316	8,888	-	8,888
Total income		<u>635,310</u>	<u>23,900</u>	<u>659,210</u>	<u>758,026</u>	<u>-</u>	<u>758,026</u>
Expenditure on:							
Raising funds	6	5,943	-	5,943	10,043	-	10,043
Charitable activities	7	593,217	23,900	617,117	650,602	-	650,602
Total expenditure		<u>599,160</u>	<u>23,900</u>	<u>623,060</u>	<u>660,645</u>	<u>-</u>	<u>660,645</u>
Net income		<u>36,150</u>	<u>-</u>	<u>36,150</u>	<u>97,381</u>	<u>-</u>	<u>97,381</u>
Transfers between funds		-	-	-	76,677	(76,677)	-
Net movement in funds	8	<u>36,150</u>	<u>-</u>	<u>36,150</u>	<u>174,058</u>	<u>(76,677)</u>	<u>97,381</u>
Reconciliation of funds:							
Fund balances at 1 April 2024		<u>688,905</u>	<u>-</u>	<u>688,905</u>	<u>514,847</u>	<u>76,677</u>	<u>591,524</u>
Fund balances at 31 March 2025		<u>725,055</u>	<u>-</u>	<u>725,055</u>	<u>688,905</u>	<u>-</u>	<u>688,905</u>

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

ADVOCACY MATTERS LTD

BALANCE SHEET

AS AT 31 MARCH 2025

	Notes	2025 £	£	2024 £	£
Fixed assets					
Tangible assets	12		2,410		4,435
Current assets					
Debtors	13	49,934		57,807	
Cash at bank and in hand		676,525		630,473	
		726,459		688,280	
Creditors: amounts falling due within one year	14	(3,814)		(3,810)	
Net current assets			722,645		684,470
Total assets less current liabilities			725,055		688,905
The funds of the Charity					
Unrestricted funds	17		725,055		688,905
			725,055		688,905

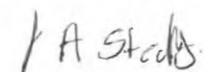
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2025.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 22 July 2025



Mrs J A Steckles - Chair
Chair of Trustees

Company registration number 07987156 (England and Wales)

ADVOCACY MATTERS LTD

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 MARCH 2025

	Notes	2025 £	£	2024 £	£
Cash flows from operating activities					
Cash generated from operations	19		40,550		81,969
Investing activities					
Purchase of tangible fixed assets		(1,814)		(2,090)	
Investment income received		7,316		8,888	
Net cash generated from investing activities			5,502		6,798
Net cash generated from financing activities			-		-
Net increase in cash and cash equivalents			46,052		88,767
Cash and cash equivalents at beginning of year			630,473		541,706
Cash and cash equivalents at end of year			676,525		630,473

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2025

1 Accounting policies

Charity information

Advocacy Matters Ltd is a private company limited by guarantee incorporated in England and Wales. The registered office is 198 Boldmere Road, Sutton Coldfield, West Midlands, B73 5UE.

1.1 Accounting convention

The financial statements have been prepared in accordance with the Charity's governing document, the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" and the Charities SORP "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)". The Charity is a Public Benefit Entity as defined by FRS 102.

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

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

1.2 Going concern

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

1.3 Charitable funds

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

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

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

1.4 Income

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

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

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

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

1 Accounting policies

(Continued)

1.5 Expenditure

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, 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 classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges are allocated on the portion of the asset's use.

1.6 Tangible fixed assets

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

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

Plant and equipment	3 years straight line
Fixtures and fittings	3 years straight line

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

1.7 Impairment of fixed assets

At each reporting end date, the Charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.8 Cash and cash equivalents

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

1.9 Financial instruments

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

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

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

Financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

1 Accounting policies

(Continued)

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3 Income from donations and legacies

	Unrestricted funds 2025 £	Unrestricted funds 2024 £
Donations and gifts	298	570

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

4 Income from charitable activities

	Unrestricted funds 2025 £	Restricted funds 2025 £	Total 2025 £	Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £
Project						
Power Contract	582,994	23,900	606,894	704,132	-	704,132
Physical Disability	44,702	-	44,702	44,436	-	44,436
	<u>627,696</u>	<u>23,900</u>	<u>651,596</u>	<u>748,568</u>	<u>-</u>	<u>748,568</u>

5 Income from investments

	Unrestricted funds 2025 £	Unrestricted funds 2024 £
Interest receivable	<u>7,316</u>	<u>8,888</u>

6 Expenditure on raising funds

	Unrestricted funds 2025 £	Unrestricted funds 2024 £
Fundraising and publicity		
Seeking donations, grants and legacies	8	1,787
Staff costs	5,935	8,256
	<u>5,943</u>	<u>10,043</u>

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

7 Expenditure on charitable activities

	Charitable expenditure	Governance costs	Admin costs	Depreciation	Total
	2025	2025	2025	2025	2025
	£	£	£	£	£
Direct costs					
Staff costs	21,140	39,110	468,332	-	528,582
Depreciation and impairment	-	-	-	3,839	3,839
Charitable activities	2,761	-	54,173	-	56,934
	<u>23,901</u>	<u>39,110</u>	<u>522,505</u>	<u>3,839</u>	<u>589,355</u>
Share of support and governance costs (see note)					
Support	20,158	-	-	-	20,158
Governance	-	7,604	-	-	7,604
	<u>44,059</u>	<u>46,714</u>	<u>522,505</u>	<u>3,839</u>	<u>617,117</u>
Analysis by fund					
Unrestricted funds	20,159	46,714	522,505	3,839	593,217
Restricted funds	23,900	-	-	-	23,900
	<u>44,059</u>	<u>46,714</u>	<u>522,505</u>	<u>3,839</u>	<u>617,117</u>
Previous year:					
	Charitable expenditure	Governance costs	Admin costs	Depreciation	Total
	2024	2024	2024	2024	2024
	£	£	£	£	£
Direct costs					
Staff costs	-	40,959	509,847	-	550,806
Depreciation and impairment	-	-	-	7,063	7,063
Charitable activities	2	-	58,998	-	59,000
	<u>2</u>	<u>40,959</u>	<u>568,845</u>	<u>7,063</u>	<u>616,869</u>
Share of support and governance costs (see note)					
Support	24,080	-	-	-	24,080
Governance	-	9,653	-	-	9,653
	<u>24,082</u>	<u>50,612</u>	<u>568,845</u>	<u>7,063</u>	<u>650,602</u>
Analysis by fund					
Unrestricted funds	24,082	50,612	568,845	7,063	650,602

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

8	Net movement in funds	2025	2024
		£	£
	The net movement in funds is stated after charging/(crediting):		
	Fees payable for the independent examination of the charity's financial statements	2,700	3,120
	Depreciation of owned tangible fixed assets	3,839	7,063
		<u> </u>	<u> </u>

9 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

10 Employees

The average monthly number of employees during the year was:

	2025	2024
	Number	Number
	20	21
	<u> </u>	<u> </u>

Employment costs

	2025	2024
	£	£
Wages and salaries	483,569	506,683
Social security costs	36,924	38,470
Other pension costs	14,024	13,909
	<u> </u>	<u> </u>
	534,517	559,062
	<u> </u>	<u> </u>

There were no employees whose annual remuneration was more than £60,000.

11 Taxation

The charity is exempt from taxation on its activities because all its income is applied for charitable purposes.

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2025

12 Tangible fixed assets

	Plant and equipment £	Fixtures and fittings £	Total £
Cost			
At 1 April 2024	66,327	25,914	92,241
Additions	-	1,814	1,814
At 31 March 2025	66,327	27,728	94,055
Depreciation and impairment			
At 1 April 2024	66,327	21,479	87,806
Depreciation charged in the year	-	3,839	3,839
At 31 March 2025	66,327	25,318	91,645
Carrying amount			
At 31 March 2025	-	2,410	2,410
At 31 March 2024	-	4,435	4,435

13 Debtors

	2025 £	2024 £
Amounts falling due within one year:		
Trade debtors	43,197	54,342
Other debtors	3,272	-
Prepayments and accrued income	3,465	3,465
	49,934	57,807

14 Creditors: amounts falling due within one year

	2025 £	2024 £
Trade creditors	714	810
Accruals and deferred income	3,100	3,000
	3,814	3,810

15 Retirement benefit schemes

	2025 £	2024 £
Defined contribution schemes		
Charge to profit or loss in respect of defined contribution schemes	14,024	13,909

The Charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the Charity in an independently administered fund.

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

16 Restricted funds

The restricted funds of the charity comprise the unexpended balances of donations and grants held on trust subject to specific conditions by donors as to how they may be used.

	At 1 April 2024 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2025 £
	-	23,900	(23,900)	-	-
Previous year:	At 1 April 2023 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2024 £
Crisis Advocacy	34,374	-	-	(34,374)	-
Moving on Project	42,303	-	-	(42,303)	-
	76,677	-	-	(76,677)	-

17 Unrestricted funds

The unrestricted funds of the charity comprise the unexpended balances of donations and grants which are not subject to specific conditions by donors and grantors as to how they may be used. These include designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes.

	At 1 April 2024 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2025 £
General funds	688,905	635,310	(599,160)	-	725,055
Previous year:	At 1 April 2023 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2024 £
General funds	514,847	758,026	(660,645)	76,677	688,905

18 Related party transactions

There were no disclosable related party transactions during the year (2024 - none).

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2025

19	Cash generated from operations	2025 £	2024 £
	Surplus for the year	36,150	97,380
	Adjustments for:		
	Investment income recognised in statement of financial activities	(7,316)	(8,888)
	Depreciation and impairment of tangible fixed assets	3,839	7,063
	Movements in working capital:		
	Decrease/(increase) in debtors	7,873	(14,917)
	Increase in creditors	4	1,331
	Cash generated from operations	<u>40,550</u>	<u>81,969</u>

20 Analysis of changes in net funds

The Charity had no material debt during the year.

ADVOCACY MATTERS LTD

England & Wales - Charity number 1148198

Accounts

Charity registration number 1148198

Company registration number 07987156 (England and Wales)

ADVOCACY MATTERS LTD
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2024

ADVOCACY MATTERS LTD

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Mrs J A Steckles - Chair	
	Mr R Punton	
	Mr R Netherway	
	Mr Gordon Law	
	Mr L Campbell	(Appointed 9 May 2024)
	Mr S Watson	(Appointed 9 May 2024)
Charity number	1148198	
Company number	07987156	
Registered office	198 Boldmere Road Sutton Coldfield West Midlands B73 5UE	
Independent examiner	Jerroms Lumaneri House Blythe Gate Blythe Valley Park Solihull West Midlands B90 8AH	

ADVOCACY MATTERS LTD

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ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 MARCH 2024

The Trustees present their annual report and financial statements for the year ended 31 March 2024.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's [governing document], the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019).

Objectives and activities

The objects of the charity as set out in its Articles of Association are:

1. To promote the relief of the physical and mental sickness of persons in need by reason of addiction, bereavement or loss, and to promote social inclusion for the public benefit by preventing people from becoming socially excluded, relieving the needs of those people who are socially excluded, assisting them to integrate into society with the object of improving their conditions of life by the provision of an advocacy service in the counties of the West Midlands, Warwickshire, Worcestershire, Staffordshire and Herefordshire or elsewhere in England and Wales, where need is identified, and additional support with the object of improving their conditions of life.

For the purpose of this clause, 'socially excluded' means being excluded from society or parts of society as a result of one or more of the following factors: unemployment; financial hardship; youth and old age; ill health, (physical or mental); substance abuse or dependency, including alcohol and drugs; discrimination on the grounds of sex, race, disability, ethnic origin, religion, belief, creed, sexual orientation, gender reassignment, poor education or skills attainment; relationship and family breakdown; poor housing (that is housing that does not meet basic habitable standards); crime (i.e. either as a victim of crime or as an offender rehabilitating into society).

2. To advance education, in particular training in advocacy skills and disability issues, throughout the UK.

In support of these objects, the charity will provide advocacy to all disabled people although the requirements of funders may restrict either the geographical area or type of disability for projects.

When projects are first established, great care is taken to ensure that they are consistent with the aims and objectives of the charity and the trustees consider the Charity Commission's general guidance on public benefit. Each advocacy case is also reviewed regularly by management in supervision with the advocate responsible to ensure that these requirements continue to be met.

The advocacy provided is independent and is not subject to the direction or approval of the funder. Funds available and advocates' time will also restrict the numbers to whom advocacy can be provided. Subject to these limits, the projects are for the benefit of all members of the disabled community irrespective of ethnicity, gender or sexuality and advocacy is provided without charge to the recipient. Referrals are dealt with dependent on need, where a crisis situation or other complex issues may require immediate action.

Each project is reviewed annually to ensure that it continues to reflect the charity objectives and has delivered benefits to the group of people the project was set up to help.

Mission Statement

To provide Disabled People with an independent advocate to ensure individuals are heard and their rights, concerns and needs are acted upon.

Public benefit

The Trustees have paid due regard to guidance issued by the Charity Commission in deciding what activities the Charity should undertake.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

Achievements and performance

Significant activities and achievements against objectives

In the year under review, we are still being challenged by the post COVID 19 landscape. We have had to be mindful that the virus has not gone however pre covid service provision has commenced. Advocacy Matters have continued to risk assess for COVID 19 to ensure the safety of our service users and our staff team, but we have returned to regular face to face meetings and visits.

The surge in demand following the pandemic has continued with waiting lists being a necessity for non-statutory advocacy referrals. With many facing issues with mental health as a direct result of isolation in lockdowns. Service users have also been in financial hardship due to the cost-of-living crisis, many needing support to access food bank services and support to pay their utilities.

Birmingham City Council issued a section 114 notice on September 5, which means it must halt all spending except on essential services such as schooling, housing, social care, waste collection and road maintenance. This has not only directly impacted the finances of Advocacy Matters it has adversely affected the citizens we support with the potential for service provision being cut to disabled people.

Recruitment has not been an issue in the last financial year, and we remain fully staffed to meet the needs of all contracts and projects.

Safeguarding issues remain prevalent within all projects. We continue to support advocacy partners in increasing situations of abuse. Whilst these cases have resulted in the greater awareness of such problems and have also resulted in the improvement of safeguarding procedures and in the scrutiny of care providers, progress has been frustratingly slow, and the demand never decreases. Incidents such as these, which can often lead to protracted investigations, emphasise the need for greater diligence and the importance of independent advocacy. In the last financial year, we have seen safeguarding issues within mental health units increase and have met with the NHS trusts safeguarding lead to address this.

As a result of the independent advocacy provided by Advocacy Matters, care provision and financial arrangements are often challenged, enabling individuals to be heard who might not otherwise have a voice and control.

In September 2023 Advocacy Matters were awarded a Community Inspiration Award by the Community foundation, for the work we do with volunteers and the difference made to Birmingham communities. This is quite a prestigious award, and participants are selected from across the West Midlands.

Also, in September 2023 Advocacy Matters hosted our first student placement from Birmingham University. Elikem is studying to be a social worker and was in her first year. She was bright and engaging and added a lively addition to the team until her placement ended successfully in December 2023.

In April 2024 we had a staff awayday at the National Arboretum Staffordshire. We had team building exercises and wellbeing activities. This was a welcome reward to the staff team after a year of very hard work and high caseloads.

On the 23rd of June 2024 Nuala, our dedicated office volunteer was nominated for 50 Big Thank You, hosted by the West Midlands Lieutenant on behalf of HRH King Charles. Out of 700 nominees only 50 were nominated to attend the event and receive a certificate for their volunteering work, quite an achievement.

In December 2022 we began the process of reapplying for the Quality Performance Mark in Advocacy from NDTI, completing the self-assessment workbook. We completed this process and were Awarded the QPM in July 2023 for 3 years.

Advocacy Matters office refurbishment started in February 2023 and was finished March 2023. We have repurposed the office to provide a training room and community space to further the charities objectives. This is now used regularly for training and community groups. We host the Sutton Coldfield Neighbourhood Network Scheme (NNS) and groups from Age Concern.

This year has seen the beginning of our befriending offer. We have been able to develop and grow a new project in Sutton Coldfield with the support of our volunteers and have been providing befriending support and engaging activities to older adults without family living in care home settings. This has been funded as a pilot project by Sutton Coldfield Charitable Trust, with a view to lottery funding to extend the project city wide.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

Advocacy Matters Projects

The following is a brief review for the period of each of the major projects run and supported by Advocacy Matters.

1. My Side

The trustees consider this type of project and particularly the training and employment of volunteers to be a fundamental part of the DNA of Advocacy Matters and have agreed to continue to fund the project from Unrestricted Funds but with reduced numbers and mainly by trained Volunteers.

We continue to provide a range of services within our My Side project including 1:1 independent advocacy, group work, training to volunteers, user involvement, engagement and participation, befriending, admin opportunities, support and supervision, development and promotional work. We provide our advocacy support across Birmingham and Walsall and our befriending support currently within Sutton Coldfield in North Birmingham with the plan to increase this to the whole of Birmingham in Autumn 2024.

During this financial year we have trained and supported new volunteers and continued to support our long-standing existing volunteers providing a range of invaluable roles within the organisation. We have had a core team of 44 volunteers that have supported our charity during the year and of those providing the Independent Advocacy role they have been able to offer support to 50 individuals.

The training of new volunteers has taken place face to face 3 times this year with the addition of online learning for people who have not been able to make the dates of the face-to-face learning and so training is offered flexibly and regularly to induct new volunteers to the organisation.

There is still a clear demand for non-statutory advocacy work in Birmingham and Walsall and we continue to receive referrals for Volunteer Advocacy through our own channels within the organisation such as the website, telephone and email and also undertake a proportion of the non-statutory work on the Birmingham Advocacy project in which we are a partner with POHWER.

We have been able to offer the ongoing support that the Hear to Help element of the My Side project can provide meaning that a team of volunteers are able to offer weekly chats to socially isolated people within the community to provide a listening ear, befriending and advocacy support.

Befriending Matters Pilot (falling under My Side)

This year has seen the rise of our befriending offer, and we have been able to develop and grow a new project in Sutton Coldfield with the support of our volunteers and have been providing befriending support and engaging activities to older adults without family living in care home settings. This project will increase in the next year to be Birmingham city wide thanks to the National Lottery.

The training element of this project has largely passed to the Volunteer Advocacy Training section of the Birmingham Advocacy Hub, see 4 below.

The Steering Group is an important part of this project and provides input into the charity's governance from all areas of Birmingham and Walsall. It functions to provide former and current advocacy partners with the opportunity to access peer advocacy as well as develop self-advocacy skills. The purpose of the group is to address common barriers that prevent people accessing facilities in their local communities. Members are actively involved in such matters as the interviewing of all new staff, the provision of advice as to what accessible information should be provided by the charity, the design and content of the accessible information documentation produced and in contributing to the development of future projects for which the charity applies for funding.

Through the facilitation of our Steering Group who now total 12 individuals all of whom have at some point experienced receiving Independent Advocacy and who can guide and steer our organisation to ensure we are able to provide what is most needed in our communities. The Steering group has participated in the development and early planning of a project aimed at addressing health inequalities experienced by disabled people in our geographical areas.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) **FOR THE YEAR ENDED 31 MARCH 2024**

In this financial year we have received grants from 29th May, Saintbury Trust, Eveson Trust and Sutton Coldfield Charitable Trust.

2. Physical Disability Advocacy

PD Advocacy is funded by Birmingham Solihull Integrated Care Board and continues to be renewed and receive positive praise from commissioning about its impact and scope. We provide 1:1 Independent Advocacy for people living with the effects of Stroke, brain injury, neurological conditions, long term chronic conditions and the wider experiences of living with a physical disability.

During the year to 31st March 2024, we have been able to provide advocacy support to 61 people experiencing crisis situations around a range of issues but primarily access to health services, housing, adaptations and social isolation.

We have found improved engagement from commissioning at the ICB and are finding it useful to meet with commissioners and have received positive feedback about the impact of the project

3. Walsall Care Act

The nature and scope of this project is the same as that of the Birmingham Care Act Advocacy project, see 4 below, albeit on a smaller scale. The arrangement was direct with Walsall Metropolitan Borough Council up until October 2022. Since October 2022 we have been providing this Care Act Service in a partnership with POHWER.

April 2023 until 31st March 2024 support was provided for 272 individuals.

4. Birmingham Advocacy Hub

Birmingham City Council issued a tender encompassing not only statutory advocacy but also a pre-defined amount of non-statutory advocacy and volunteer training. This project was awarded to POHWER, a national advocacy provider. Advocacy Matters entered into a partnership agreement with POHWER to provide Advocacy Services on an agreed basis. This project commenced on 1st April 2019. It was retendered and won in April 2022 and will be contracted until April 2027. This Partnership is of critical importance to Advocacy Matters. It incorporated the Care Act, IMCA, and a substantial part of the My Side projects which represented most of the charity's existing business. In addition, other statutory advocacy and some non-statutory advocacy is also included.

Birmingham City Council issued a section 114 notice on September 5, which means it must halt all spending except on essential services such as schooling, housing, social care, waste collection and road maintenance. The council are planning to cut the hourly rate paid for this work from April 2024 which may affect our continued inclusion in this work from April 2025.

A summary of each of the elements of the project is given below.

Care Act Advocacy

Care Act Advocacy is a form of statutory Advocacy governed by the Care Act 2014 whereby local authorities must arrange an independent advocate to facilitate the involvement of a person in their assessment, in the preparation of their care and support plan, in the review of their care plan, and in appropriate safeguarding procedures. This independent advocacy must be implemented to provide assistance if the following two conditions are met: -

- Where the potential recipient has substantial difficulty in being fully involved in these processes
- Where there is no one appropriate available to support and represent the person's wishes.

The role of the independent advocate is to support and represent the person and to facilitate their involvement in the key processes and interactions with the local authority. Acting as an advocate for a person who has substantial difficulty in engaging with care and support processes is a responsible position.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

This work includes: -

- Assisting a person to understand the assessment, the care and support planning and the review processes. This requires advocates to understand local authority policies and processes, the available assessment tools, the planning options and the options available at the review of a care or support plan. It may involve advocates spending considerable time with the individual, considering their communications needs, their wishes and feelings and their life story, and using all this to assist the person to be involved and where possible to make decisions.
- Assisting a person to communicate their views, wishes and feelings to the staff who are carrying out an assessment or developing a care or support plan or reviewing an existing plan.
- Assisting a person to understand how their needs can be met by the local authority or otherwise – understanding, for example, how a plan can be personalised, how it can be tailored to meet specific needs, how it can be creative and inclusive and how it can be used to promote a person's rights to liberty and to family life.
- Assisting the person to make decisions about their care and support arrangements – assisting them to weigh up various care and support options and to choose the ones that best meet the person's needs and wishes.
- Assisting the person to understand their rights under the Care Act – for an assessment which considers their wishes and feelings, and which considers the views of other people; their right to have their eligible needs met and to have a care or support plan that reflects their needs and their preferences. Also assisting the person to understand their wider rights, including their rights to liberty and family life. A person's rights are complemented by the local authority's duties, for example, to involve the person, to meet needs in a way that is least restrictive of a person's rights.
- Assisting a person to challenge a decision made by the local authority; and where a person cannot challenge the decision even with assistance, then

Independent Mental Capacity Advocacy (IMCA)

The Mental Capacity Act came into force in April 2007 introducing statutory independent advocacy and imposing on the NHS and Local Authorities the duty to consult in defined situations concerning vulnerable individuals. IMCA requires the provision of non-instructed advocacy to individuals, aged 16 and over, who have been assessed to lack capacity for specific decisions and who have no family or friends who might otherwise advocate on their behalf.

This may include those with learning difficulties, dementia, mental health problems, acquired brain injury and cognitive impairments associated with serious physical illness.

IMCA is a very specialist form of advocacy and all advocates involved in this form of advocacy are required to undertake specialist training.

IMCA advocates will also be involved in any Safeguarding aspects related to Deprivation of Liberty (DoLs) under the Mental Capacity Act 2009.

Independent Mental Health Advocacy (IMHA)

IMHA is covered by Mental Health Act Revision 2007 and relates to inpatients held under a section of the Mental Health Act 1983.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

Independent Complaints Advocacy Service (ICAS)

National Health Complaints are the statutory responsibility of the National Health Service but these are commissioned through Public Health England and the local authority.

Community Advocacy

Community Advocacy applies to all issues that vulnerable people face which fall outside the above legislation.

Volunteer Advocacy Training

One of the forms of advocacy which Birmingham City Council are keen to support is advocacy by volunteers which they are promoting by supporting the training of potential new advocates.

1592 referrals were dealt with during the period and 4 training courses were held providing volunteer training for 55 participants.

5. Charities Aid Foundation Resilience Grants

The Main Grant was awarded in October 2021. This was used to employ staff needed to make Advocacy Matters a robust charity. Using this grant we have appointed a full-time senior advocate, a user- led facilitator to work with the steering group and a Finance Manager. This grant was used by 31/3/2023.

6. Childrens Age Assessments- Appropriate Adult

The age assessment of unaccompanied children seeking asylum is a challenging process and is there to establish if the individual will be supported as a child or adult. Often Children and young people seeking asylum do not have documentation with proof of age and sometimes are not aware of how old they are or their birthdate. A child or young person undergoing an age assessment must have the opportunity to have an appropriate adult present with them during the interviews. It is important that the role of the appropriate adult is clearly explained at the outset of the interviews, and it is recommended that the same appropriate adult is used throughout the age assessment.

Advocacy Matters were awarded a contract to provide this service from Birmingham Children's Trust in January 2023. As of 31st of March 2024 we have received 51 Referrals.

Financial review

The results for the year are set out in the attached Financial Statements and Notes. The net movement of funds for the period amounted to a surplus of £97,381 The total retained reserves at 31st March 2024 amounted to £688,905.

Reserves policy

It is the policy of the Charity that unrestricted funds which have not been designated for a specific use should be maintained at a level equivalent to between three and six month's expenditure. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the Charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

The trustees periodically review the reserves position of the charity to ascertain whether or not the funds that they are holding are adequate for its work. In doing this they take into consideration the financial risks to which the charity is subject, the assets and working capital requirements for continued service delivery and for unforeseen circumstances, particularly relating to uncertainties of future funding.

A further major consideration is the drastic change in the way that many projects are being funded. In many cases remuneration is on a per hour or per referral basis with payment in arrears with no guarantee of the number of referrals which will be required. This places all the risk on to the provider and could have a catastrophic effect on the charity's funds if things go wrong.

At 31 March 2024 the charity had reserves of £688,905. The trustees have reviewed whether unrestricted funds can be applied for public benefit whilst maintaining an appropriate level of free reserves. The trustees are of the opinion that free reserves (reserves available for working capital, development and provision of the service) should be at least six months costs of running the organisation. The trustees therefore consider that the free reserves are adequate.

Plans for future periods

The trustees will continue to seek new projects which are suitable and beneficial to the community of people with disabilities, which are consistent with the charity's aims and objectives and which deliver public benefit to all members of the community.

The reduction in funding from Local Authorities generally and the reluctance of other potential funders to fund non-statutory advocacy means that different approaches to fundraising are required if the charity is to remain sustainable with adequate levels of funding and this is now a priority which is being urgently addressed.

One of the Objects of the charity is to advance education, in particular by providing training in advocacy skills and disability issues. This training is now handled by the Volunteer Advocacy Training section of the Birmingham Advocacy Hub (see 4 above) and will continue to be a priority. A brief outline of the type of facilities which could be provided is available on the charity's website. This training will normally be provided to other advocacy organisations or health professionals to the ultimate public benefit of the disabled community as a whole.

Structure, governance and management

The Charity is a company limited by guarantee. The trustees/directors named on page 1 are also the only members of the company. In the event of the company being wound up, their liability in respect of the guarantee is limited to £1 each.

The charity was incorporated on 12th March 2012 and is governed by its Memorandum and Articles of Association. The company was formed specifically to take over the operations of Advocacy Matters, an unincorporated charity which has since been decommissioned. The company commenced operations on 1st October 2012 at which point any remaining assets or liabilities of the unincorporated charity were transferred to the company.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Mrs J A Steckles - Chair

Mr R Punton

Mr P Shergold

(Resigned 9 May 2024)

Mr R Netherway

Mr Gordon Law

Mr L Campbell

(Appointed 9 May 2024)

Mr S Watson

(Appointed 9 May 2024)

Recruitment and appointment of trustees

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

The charity is governed by an Executive Committee comprising all the Trustees who are also Directors and the only members of the company. During the year under review, the day-to-day management of the charity was undertaken by the Chief Executive Officer with the assistance of three Operations Managers and two Senior Advocates.

Where there is a requirement for a new trustee, candidates will normally be identified from recommendations by existing trustees or Operations Managers, particularly bearing in mind the skills and experience which such candidates would bring in areas which are beneficial to the charity but may not necessarily be represented by the existing trustees. Potential new trustees will usually be interviewed by the Chair and one of the Chief Executive who will explain the concept of advocacy and the aims and objectives of the charity. They are also informed of their legal obligations under charity and company law, the Charity Commission guidance on public benefit and are provided with leaflets from the Charity Commission so that they are aware of their roles and responsibilities before they decide to take on the role. Successful candidates are invited to attend the next trustees' meeting as observers and are provided with a copy of the Memorandum and Articles of Association.

New trustees are voted in by the Executive Committee and appointments are subject to Enhanced Disclosure and Barring Scheme checks. New trustees are provided with a trustee Induction Pack and offered Trustee training. Advocacy Training is available to ensure the new trustee is fully aware of the meaning of advocacy.

All members of the Executive Committee give their time voluntarily and do not receive any benefits from the charity. Note 7 to the accounts shows any expenses claimed by the Trustees during the period.

The Steering Group, which is incorporated into the My Side project, ensures that the charity remains "user led" and provides an important element of the charity's structure and governance.

Risk management

The Trustees continually assess the risks to which the charity and its staff are exposed. This has been more relevant than ever because of the potential dangers of COVID 19. Where appropriate, systems, policies and procedures have been implemented to reduce these risks. They cover areas such as health and safety of staff, volunteers and visitors and lone working for staff and volunteers. These policies and procedures are regularly reviewed to ensure they are up to date and cover all areas involving the charity. All staff and volunteer appointments are subject to Enhanced Disclosure and Barring Scheme checks and full training is given to safeguard not only the safety of staff and volunteers but also the users for whom they may be advocating. A written risk assessments are carried out for every disabled person who is to be supported by a member of staff or volunteer and is held on file.

Risk Assessments relating to the office are carried out annually and Health and Safety is included on the Agenda of Staff Meetings.

Financial Risk is a major consideration for a small charity and liquid funds and reserves are regularly reviewed to ensure that there is sufficient working capital for the charity's needs. This includes the ability to finance the expenditure for those projects where payment for services is made in arrears.

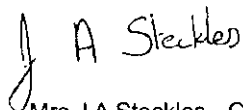
Pay policy

The trustees consider the Chief Executive Officer and the three Operations Managers to be key management personnel but the pay policy for these key personnel is the same as for other staff. The pay of all staff is reviewed annually and will normally be increased in line with, or above, average earnings benchmarked against similar roles at other charities or the public sector, with a view to ensuring that they are paid at least as well as those benchmarks.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

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



Mrs J A Steckles - Chair
Chair of Trustees

25 September 2024

ADVOCACY MATTERS LTD

STATEMENT OF TRUSTEES' RESPONSIBILITIES

FOR THE YEAR ENDED 31 MARCH 2024

The Trustees, who are also the directors of Advocacy Matters Ltd for the purpose of company law, are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (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 Charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the Trustees are required to:

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

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

Insofar as the trustees are aware:

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

The strategic report under the Companies Act 2006 (Strategic Report and Directors' Report) Regulations 2013 is not required as the charity qualifies as a small charitable company.

ADVOCACY MATTERS LTD

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF ADVOCACY MATTERS LTD

I report to the Trustees on my examination of the financial statements of Advocacy Matters Ltd (the Charity) for the year ended 31 March 2024.

Responsibilities and basis of report

As the Trustees of the Charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the financial statements of the Charity 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 the Charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

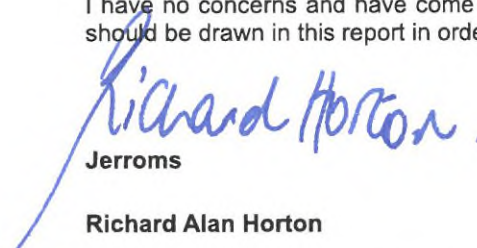
Independent examiner's statement

Since the Charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of [ENTER IN DATABASE cy1015], 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 that in any material respect:

- 1 accounting records were not kept in respect of the Charity as required by section 386 of the 2006 Act; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements 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 financial statements 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 financial statements to be reached.



Jerroms

Richard Alan Horton

Chartered Certified Accountant

Lumaneri House
Blythe Gate
Blythe Valley Park
Solihull
West Midlands
B90 8AH

Dated: 25 September 2024

ADVOCACY MATTERS LTD

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2024

		Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £
	Notes						
Income from:							
Donations and legacies	3	570	-	570	-	9,720	9,720
Charitable activities	4	748,568	-	748,568	538,531	114,080	652,611
Other trading activities	5	-	-	-	1,369	-	1,369
Investments	6	8,888	-	8,888	769	-	769
Total income		758,026	-	758,026	540,669	123,800	664,469
Expenditure on:							
Raising funds	7	10,043	-	10,043	16,862	-	16,862
Charitable activities	8	650,602	-	650,602	438,064	202,151	640,215
Total expenditure		660,645	-	660,645	454,926	202,151	657,077
Net income		97,381	-	97,381	85,743	(78,351)	7,392
Transfers between funds		76,677	(76,677)	-	4,248	(4,248)	-
Net movement in funds	9	174,058	(76,677)	97,381	89,991	(82,599)	7,392
Reconciliation of funds:							
Fund balances at 1 April 2023		514,847	76,677	591,524	424,856	159,276	584,132
Fund balances at 31 March 2024		688,905	-	688,905	514,847	76,677	591,524

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

ADVOCACY MATTERS LTD

BALANCE SHEET

AS AT 31 MARCH 2024

	Notes	2024 £	£	2023 £	£
Fixed assets					
Tangible assets	13		4,435		9,407
Current assets					
Debtors	14	57,807		42,890	
Cash at bank and in hand		630,473		541,706	
		688,280		584,596	
Creditors: amounts falling due within one year	15	(3,810)		(2,479)	
Net current assets			684,470		582,117
Total assets less current liabilities			688,905		591,524
Net assets excluding pension liability			688,905		591,524
The funds of the Charity					
Restricted income funds	17		-		76,677
Unrestricted funds			688,905		514,847
			688,905		591,524

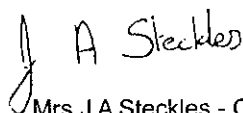
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2024.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 25 September 2024



Mrs J A Steckles - Chair
Chair of Trustees

Company registration number 07987156 (England and Wales)

ADVOCACY MATTERS LTD

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 MARCH 2024

	Notes	2024 £	£	2023 £	£
Cash flows from operating activities					
Cash generated from operations	21		81,969		13,115
Investing activities					
Purchase of tangible fixed assets		(2,090)		(9,126)	
Investment income received		8,888		769	
Net cash generated from/(used in) investing activities			6,798		(8,357)
Net cash used in financing activities			-		-
Net increase in cash and cash equivalents			88,767		4,758
Cash and cash equivalents at beginning of year			541,706		536,948
Cash and cash equivalents at end of year			630,473		541,706

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2024

1 Accounting policies

Charity information

Advocacy Matters Ltd is a private company limited by guarantee incorporated in England and Wales. The registered office is 198 Boldmere Road, Sutton Coldfield, West Midlands, B73 5UE.

1.1 Accounting convention

The financial statements have been prepared in accordance with the Charity's [governing document], the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the Charities SORP "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). The Charity is a Public Benefit Entity as defined by FRS 102.

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

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

1.2 Going concern

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

1.3 Charitable funds

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

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

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

1.4 Income

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

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

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

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

1 Accounting policies

(Continued)

1.5 Expenditure

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, 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 classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges are allocated on the portion of the asset's use.

1.6 Tangible fixed assets

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

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

Plant and equipment	3 years straight line
Fixtures and fittings	3 years straight line

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

1.7 Impairment of fixed assets

At each reporting end date, the Charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.8 Cash and cash equivalents

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

1.9 Financial instruments

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

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

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

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

1 Accounting policies

(Continued)

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3 Income from donations and legacies

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £
Donations and gifts	570	-	570	-	9,720	9,720

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

4 Income from charitable activities

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £
Project						
POhWER Contract	704,132	-	704,132	498,767	-	498,767
Physical Disability	44,436	-	44,436	39,764	-	39,764
Income from charitable activities	-	-	-	-	114,080	114,080
	<u>748,568</u>	<u>-</u>	<u>748,568</u>	<u>538,531</u>	<u>114,080</u>	<u>652,611</u>

5 Income from other trading activities

	Unrestricted funds 2024 £	Unrestricted funds 2023 £
Fundraising events	-	1,369
	<u>-</u>	<u>1,369</u>

6 Income from investments

	Unrestricted funds 2024 £	Unrestricted funds 2023 £
Interest receivable	8,888	769
	<u>8,888</u>	<u>769</u>

7 Expenditure on raising funds

	Unrestricted funds 2024 £	Unrestricted funds 2023 £
Fundraising and publicity		
Raising funds	1,787	8,763
Staff costs	8,256	8,099
	<u>10,043</u>	<u>16,862</u>

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

8 Expenditure on charitable activities

	Charitable expenditure	Governance costs	Admin costs	Depreciation	Total
	2024	2024	2024	2024	2024
	£	£	£	£	£
Direct costs					
Staff costs	-	40,959	509,847	-	550,806
Depreciation and impairment	-	-	-	7,063	7,063
Charitable activities	2	-	58,998	-	59,000
	<u>2</u>	<u>40,959</u>	<u>568,845</u>	<u>7,063</u>	<u>616,869</u>
Share of support and governance costs (see note)					
Support	24,080	-	-	-	24,080
Governance	-	9,653	-	-	9,653
	<u>24,082</u>	<u>50,612</u>	<u>568,845</u>	<u>7,063</u>	<u>650,602</u>
Analysis by fund					
Unrestricted funds	24,082	50,612	568,845	7,063	650,602
	<u>24,082</u>	<u>50,612</u>	<u>568,845</u>	<u>7,063</u>	<u>650,602</u>
Previous year:					
	Charitable expenditure	Governance costs	Admin costs	Depreciation	Total
	2023	2023	2023	2023	2023
	£	£	£	£	£
Direct costs					
Staff costs	146,128	17,401	322,555	-	486,084
Depreciation and impairment	-	-	-	6,407	6,407
Charitable activities	56,024	-	19,173	-	75,197
	<u>202,152</u>	<u>17,401</u>	<u>341,728</u>	<u>6,407</u>	<u>567,688</u>
Share of support and governance costs (see note)					
Support	67,383	-	-	-	67,383
Governance	-	5,144	-	-	5,144
	<u>269,535</u>	<u>22,545</u>	<u>341,728</u>	<u>6,407</u>	<u>640,215</u>
Analysis by fund					
Unrestricted funds	67,384	22,545	341,728	6,407	438,064
Restricted funds	202,151	-	-	-	202,151
	<u>269,535</u>	<u>22,545</u>	<u>341,728</u>	<u>6,407</u>	<u>640,215</u>

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

9	Net movement in funds	2024	2023
		£	£
	The net movement in funds is stated after charging/(crediting):		
	Depreciation of owned tangible fixed assets	7,063	6,407
		<u> </u>	<u> </u>

10 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

11 Employees

The average monthly number of employees during the year was:

	2024	2023
	Number	Number
	21	21
	<u> </u>	<u> </u>

Employment costs	2024	2023
	£	£
Wages and salaries	506,683	446,757
Social security costs	38,470	31,875
Other pension costs	13,909	15,551
	<u> </u>	<u> </u>
	559,062	494,183
	<u> </u>	<u> </u>

There were no employees whose annual remuneration was more than £60,000.

12 Taxation

The charity is exempt from taxation on its activities because all its income is applied for charitable purposes.

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

13 Tangible fixed assets

	Plant and equipment £	Fixtures and fittings £	Total £
Cost			
At 1 April 2023	66,327	23,823	90,150
Additions	-	2,090	2,090
At 31 March 2024	66,327	25,913	92,240
Depreciation and impairment			
At 1 April 2023	63,003	17,739	80,742
Depreciation charged in the year	3,324	3,739	7,063
At 31 March 2024	66,327	21,478	87,805
Carrying amount			
At 31 March 2024	-	4,435	4,435
At 31 March 2023	3,323	6,084	9,407

14 Debtors

	2024 £	2023 £
Amounts falling due within one year:		
Trade debtors	54,342	42,890
Prepayments and accrued income	3,465	-
	57,807	42,890

15 Creditors: amounts falling due within one year

	2024 £	2023 £
Trade creditors	810	(521)
Accruals and deferred income	3,000	3,000
	3,810	2,479

16 Retirement benefit schemes

	2024 £	2023 £
Defined contribution schemes		
Charge to profit or loss in respect of defined contribution schemes	13,909	15,551

The Charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the Charity in an independently administered fund.

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2024

17 Restricted funds

The restricted funds of the charity comprise the unexpended balances of donations and grants held on trust subject to specific conditions by donors as to how they may be used.

	At 1 April 2023 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2024 £
Crisis Advocacy	34,374	-	-	(34,374)	-
Moving on Project	42,303	-	-	(42,303)	-
	<u>76,677</u>	<u>-</u>	<u>-</u>	<u>(76,677)</u>	<u>-</u>
Previous year:	At 1 April 2022 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2023 £
Walsall Care Act	-	60,609	(56,332)	(4,277)	-
CAF Resilience Grants	82,628	46,536	(129,164)	-	-
Crisis Advocacy	34,374	-	-	-	34,374
Moving on Project	42,303	-	-	-	42,303
Next Stop	(4,885)	-	-	4,885	-
Working with Learning Disabled Parents	4,856	-	-	(4,856)	-
Creative City - Personal Best	-	10,280	(10,280)	-	-
Training Costs - Sutton Charities	-	6,375	(6,375)	-	-
	<u>159,276</u>	<u>123,800</u>	<u>(202,151)</u>	<u>(4,248)</u>	<u>76,677</u>

18 Unrestricted funds

The unrestricted funds of the charity comprise the unexpended balances of donations and grants which are not subject to specific conditions by donors and grantors as to how they may be used. These include designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes.

	At 1 April 2023 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2024 £
General funds	514,847	758,026	(660,645)	76,677	688,905
	<u>514,847</u>	<u>758,026</u>	<u>(660,645)</u>	<u>76,677</u>	<u>688,905</u>
Previous year:	At 1 April 2022 £	Incoming resources £	Resources expended £	Transfers £	At 31 March 2023 £
General funds	424,856	540,669	(454,926)	4,248	514,847
	<u>424,856</u>	<u>540,669</u>	<u>(454,926)</u>	<u>4,248</u>	<u>514,847</u>

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2024

19 Analysis of net assets between funds

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £
At 31 March 2024:			
Tangible assets	4,435	-	4,435
Current assets/(liabilities)	684,470	-	684,470
	<u>688,905</u>	<u>-</u>	<u>688,905</u>
	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £
At 31 March 2023:			
Tangible assets	9,407	-	9,407
Current assets/(liabilities)	505,440	76,677	582,117
	<u>514,847</u>	<u>76,677</u>	<u>591,524</u>

20 Related party transactions

There were no disclosable related party transactions during the year (2023 - none).

21 Cash generated from operations

	2024 £	2023 £
Surplus for the year	97,380	7,392
Adjustments for:		
Investment income recognised in statement of financial activities	(8,888)	(769)
Depreciation and impairment of tangible fixed assets	7,063	6,407
Movements in working capital:		
(Increase)/decrease in debtors	(14,917)	453
Increase/(decrease) in creditors	1,331	(368)
Cash generated from operations	<u>81,969</u>	<u>13,115</u>

22 Analysis of changes in net funds

The Charity had no material debt during the year.

ADVOCACY MATTERS LTD

England & Wales - Charity number 1148198

Accounts

Charity registration number 1148198

Company registration number 07987156 (England and Wales)

ADVOCACY MATTERS LTD
ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023

ADVOCACY MATTERS LTD

LEGAL AND ADMINISTRATIVE INFORMATION

Trustees	Mrs J A Steckles - Chair Mr R Punton Mr P Shergold Mr R Netherway Mr Gordon Law
Charity number	1148198
Company number	07987156
Registered office	198 Boldmere Road Sutton Coldfield West Midlands B73 5UE
Independent examiner	Jerroms Lumaneri House Blythe Gate Blythe Valley Park Sollhull West Midlands B90 8AH

ADVOCACY MATTERS LTD

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ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 MARCH 2023

The Trustees present their annual report and financial statements for the year ended 31 March 2023.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's [governing document], the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019).

Objectives and activities

The objects of the charity as set out in its Articles of Association are:

1. To promote the relief of the physical and mental sickness of persons in need by reason of addiction, bereavement or loss, and to promote social inclusion for the public benefit by preventing people from becoming socially excluded, relieving the needs of those people who are socially excluded, assisting them to integrate into society with the object of improving their conditions of life by the provision of an advocacy service in the counties of the West Midlands, Warwickshire, Worcestershire, Staffordshire and Herefordshire or elsewhere in England and Wales, where need is identified, and additional support with the object of improving their conditions of life.

For the purpose of this clause, 'socially excluded' means being excluded from society or parts of society as a result of one or more of the following factors: unemployment; financial hardship; youth and old age; ill health, (physical or mental); substance abuse or dependency, including alcohol and drugs; discrimination on the grounds of sex, race, disability, ethnic origin, religion, belief, creed, sexual orientation, gender reassignment, poor education or skills attainment; relationship and family breakdown; poor housing (that is housing that does not meet basic habitable standards); crime (i.e. either as a victim of crime or as an offender rehabilitating into society).

2. To advance education, in particular training in advocacy skills and disability issues, throughout the UK.

In support of these objects, the charity will provide advocacy to all disabled people although the requirements of funders may restrict either the geographical area or type of disability for projects.

When projects are first established, great care is taken to ensure that they are consistent with the aims and objectives of the charity and the trustees consider the Charity Commission's general guidance on public benefit. Each advocacy case is also reviewed regularly by management in supervision with the advocate responsible to ensure that these requirements continue to be met.

The advocacy provided is independent and is not subject to the direction or approval of the funder. Funds available and advocates' time will also restrict the numbers to whom advocacy can be provided. Subject to these limits, the projects are for the benefit of all members of the disabled community irrespective of ethnicity, gender or sexuality and advocacy is provided without charge to the recipient. Referrals are dealt with dependent on need, where a crisis situation or other complex issues may require immediate action.

Each project is reviewed annually to ensure that it continues to reflect the charity objectives and has delivered benefits to the group of people the project was set up to help.

Mission Statement

To provide Disabled People with an independent advocate to ensure individuals are heard and their rights, concerns and needs are acted upon.

The Trustees have paid due regard to guidance issued by the Charity Commission in deciding what activities the Charity should undertake.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) **FOR THE YEAR ENDED 31 MARCH 2023**

Achievements and performance

In the year under review, we have been challenged by the post COVID 19 landscape. We have had to be mindful that the virus has not gone but that there was a need to resume a pre COVID service provision. Managers and staff have responded well to all the issues with which they have been faced. Advocacy Matters have continued to risk assess for COVID 19 to ensure the safety of our service users and our staff team, but we have largely returned to regular face to face meetings and visits.

There has been a surge in demand following the pandemic with many facing issues with mental health as a direct result of isolation in lockdowns. Service users have also been in financial hardship, many needing support to access food bank services.

Post pandemic recruitment of staff and volunteers has been difficult, with many in our workforce and volunteering pool changing their lives, reducing their hours, retiring early and leaving the job market completely. This is thankfully easing at the end of March 2023.

Safeguarding issues are more prevalent within all projects. We have supported advocacy partners in increasing situations of abuse. Whilst these cases have resulted in the greater awareness of such problems and have also resulted in the improvement of safeguarding procedures and in the scrutiny of care providers, progress has been frustratingly slow, and the demand never decreases. Incidents such as these, which can often lead to protracted investigations, emphasise the need for greater diligence and the importance of independent advocacy.

As a result of the independent advocacy provided by Advocacy Matters, care provision and financial arrangements are often challenged, enabling individuals to be heard who might not otherwise have a voice and control.

2022/23 was Advocacy Matters 20th Birthday Year. On April the 9th we invited all service users, staff, and trustees to come and celebrate with us at the Advocacy Matters Tea Party. The venue was kindly donated by Jaffray Care at their Day Centre.

In May 2022 we completed our Theory of Change supporting the charities resilience and objectives. The whole staff team, volunteers and service users were involved in the formulation of this with Leah Salinger Consultant to facilitate. This was made possible with the grant funding from Charitable Aid Foundation and has brought a new outlook, business plan operational changes. These changes have included a communication strategy, new publicity materials and the production of the Advocacy Matters News Flash newsletter. (See 5 Below)

On the 5th of August Advocacy Matters in partnership with Bostin Creatives premiered 'Personal Best', the film we produced with monies from the creative city grant provided by Birmingham City council as part of the Commonwealth Games Festival. The film went on to be shown across Birmingham, Walsall, and Sandwell at the Commonwealth Games Festival events. (See 6 Below)

In December 2022 we began the process of reapplying for the Quality Performance Mark in Advocacy from NDTI, completing the self-assessment workbook. We will complete this process in June 2023. Advocacy Matters held a Celebration of Advocacy event at Sutton Coldfield Town Hall on the 19th of February 2023 as the final event of our 20th year.

Advocacy Matters office refurbishment started in February 2023 and was finished March 2023. We have repurposed the office to provide a training room and community space to further the charities objectives.

In 20 years, we have advocated 20,280 people across Birmingham & Walsall, 1164 of these were supported by volunteers. This is around 220,500 hours of advocacy support.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

Advocacy Matters Projects

The following is a brief review for the period of each of the major projects run and supported by Advocacy Matters.

1. My Side

The trustees consider this type of project and particularly the training and employment of volunteers to be a fundamental part of the DNA of Advocacy Matters. We have agreed to continue to fund the project from grant funding and Unrestricted Funds.

We have provided a range of different services on this project including one to one advocacy casework, group work, volunteer training, support, supervision, attendance at events and the continued promotion of our work. The project also facilitates user groups of disabled adults and those with support needs across Birmingham and Walsall.

During the year support was given by 42 Volunteers covering this range of activities and Independent Advocacy support was given to 48 people.

One of the project's aims is to recruit and train volunteer advocates, which has been challenging since the pandemic. This recruitment has continued, and a number of carefully vetted and trained volunteer advocates are undertaking advocacy work with careful support and supervision.

There is still a clear demand for non-statutory advocacy work in Birmingham and we continue to be a much-needed service for support for individuals with needs who do not meet the eligibility for statutory advocacy. We have been able to provide independent advocacy for 48 users, but this still leaves a huge number of people in Birmingham for whom no Independent advocacy is available.

The training element of this project has largely passed to the Volunteer Advocacy Training section of the Birmingham Advocacy Hub, see 4 below.

The Steering Group is an important part of this project and provides input into the charity's governance from all areas of Birmingham and Walsall. It functions to provide former and current advocacy partners with the opportunity to access peer advocacy as well as develop self-advocacy skills. The purpose of the group is to address common barriers that prevent people accessing facilities in their local communities. Members are actively involved in such matters as the interviewing of all new staff, the provision of advice as to what accessible information should be provided by the charity, the design and content of the accessible information documentation produced and in contributing to the development of future projects for which the charity applies for funding.

In this financial year we have received grants from 29th May Charitable Trust, Saintbury Trust and The Eveson Trust to support our volunteering work.

2. Physical Disability Advocacy

This project is now being funded by ICB (Birmingham Integrated Care Board) has again been renewed. The project provides support for people who have experienced strokes or have other long-term, chronic conditions, including certain physical disabilities arising from spinal injuries, amputations, neurological conditions, traumatic brain injury etc.

During the year to 31st March 2023, support with Independent Advocacy was provided to 58 people and a range of development activities were carried out at Queen Elizabeth and Good Hope hospitals, GP surgeries, the health Exchange and others.

'Excellent advocate. Extremely kind and understanding of my needs. Five star thank you for being my voice'.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

3. Walsall Care Act Advocacy

The nature and scope of this project is the same as that of the Birmingham Care Act Advocacy project, see 4 below, albeit on a smaller scale. The arrangement was direct with Walsall Metropolitan Borough Council up until October 2022. Since October 2022 we have been providing this Care Act Service in a partnership with POhWER.

During the year under review, support prior to October 2022 was provided for 142 individuals. Subsequent to October 2022 until 31st March 2023 support was provided for 130 individuals.

4. Birmingham Advocacy Hub

Birmingham City Council issued a tender encompassing not only statutory advocacy but also a pre-defined amount of non-statutory advocacy and volunteer training. This project was awarded to POhWER, a national advocacy provider.

Advocacy Matters entered into a partnership agreement with POhWER to provide Advocacy Services on an agreed basis. This project commenced on 1st April 2019. It was retendered and won in April 2022 and will be contracted until April 2027. This Partnership is of critical importance to Advocacy Matters. It incorporated the Care Act, IMCA, and a substantial part of the My Side projects which represented most of the charity's existing business. In addition, other statutory advocacy and some non-statutory advocacy is also included.

A summary of each of the elements of the project is given below.

Care Act Advocacy

Care Act Advocacy is a form of statutory Advocacy governed by the Care Act 2014 whereby local authorities must arrange an independent advocate to facilitate the involvement of a person in their assessment, in the preparation of their care and support plan, in the review of their care plan, and in appropriate safeguarding procedures. This independent advocacy must be implemented to provide support if the following two conditions are met: -

- Where an individual has substantial difficulty in being fully involved in these processes.
- Where there is no one appropriate available to support and represent the person's wishes.

The role of the independent advocate is to support and represent the person and to facilitate their involvement in the key processes and interactions with the local authority. Advocates ensure the individuals are able to challenge the outcome of Local Authority Care Act processes. Acting as an advocate for a person who has substantial difficulty in engaging with care and support processes is a responsible position.

'The advocate ensured that jargon was removed from the conversation, or at least explained in an understandable way'.

Independent Mental Capacity Advocacy (IMCA)

The Mental Capacity Act came into force in April 2007 introducing statutory Independent advocacy and imposing on the NHS and Local Authorities the duty to instruct advocates in defined situations concerning individuals who have been assessed to lack capacity for those decisions. The MCA requires the provision of non-instructed advocacy to individuals, aged 16 and over, who have been assessed to lack capacity for specific decisions and who have no family or friends who might otherwise advocate on their behalf.

This may include those with learning difficulties, dementia, mental health issues, acquired brain injury and cognitive impairments associated with serious physical illness.

IMCA is a very specialist form of advocacy and all advocates involved in this form of advocacy are required to undertake the Independent Advocacy Qualification.

IMCA must be instructed in decisions of long term moves of accommodation (8 weeks or longer and serious medical treatment decisions. IMCA must also be instructed for decisions within The Deprivation of Liberty Safeguards 2009. The IMCA may be instructed within safeguarding procedures and care home review, although this has been largely superseded by the Care Act provisions 2014.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

Independent Mental Health Advocacy (IMHA)

IMHA is covered by Mental Health Act Revision 2007 and relates to inpatients held under a section of the Mental Health Act 1983. The IMHA will support inpatients with all aspects of challenging their section under the Mental Health Act. The IMHA will support individuals at ward rounds, discharge and to identify a solicitor for tribunal.

IMHA can also support those individuals who are discharged on a Community Treatment Order to the community. Those on a CTO are still considered to be under a section of the Mental Health Act. Therefore, they can be recalled to hospital on the discretion of their treating clinicians.

Paid Persons Representative (PPR)

As part of the deprivation of Liberty Safeguard 2009 we provide the Paid persons Representative to individuals deprived of their liberty in hospitals and care homes. PPR visit the person deprived of their liberty regularly. Help the person to understand their Deprivation of Liberty Safeguards (DoLS) authorisation and how it affects them. As far as possible, assist the person to exercise their rights if they want to challenge their deprivation.

Independent Complaints Advocacy Service (ICAS)

National Health Complaints are the statutory responsibility of the National Health Service, but these are commissioned through Public Health England and the local authority. The ICAS advocate can support any citizen who requires support with making an NHS complaint. An ICAS advocate supports individuals to write, submit and appeal NHS Complaints. Ultimately the ICAS advocate will support the complainant to take their complaint to the Parliamentary and Health Service Ombudsman. Once the Ombudsman has responded the role of the ICAS advocate terminates.

Community Advocacy

Community Advocacy applies to all the issues, for individuals with support needs, face which fall outside of statutory advocacy. Community advocates support many citizens to have a voice and challenge decisions that affect their lives. It supports individuals to ensure their rights are upheld and they have the services they are entitled to and need. In 22/23 we have supported people to access appropriate housing, make complaints and ensure they are financially empowered and have all the monies they are entitled to and are free from abuse.

Volunteer Advocacy Training

Birmingham City Council would like citizens across the communities in Birmingham to gain advocacy skills to be able to advocate for themselves and their communities. Therefore, one of the forms of advocacy which Birmingham City Council are keen to support is advocacy by volunteers which they are promoting by supporting the training of potential new advocates.

'It was a great session, very informative and interactive. I learned the importance of advocacy, what makes a good advocate and the importance of valuing people'.

1676 referrals were dealt with in the Birmingham Advocacy Hub Project during the period and 4 training courses were held providing volunteer training for 48 participants.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

5. Charities Aid Foundation Resilience Grants

The Main Grant was awarded in October 2021. This was used to employ staff needed to make Advocacy Matters a robust charity. Using this grant, we have appointed a full-time senior advocate, a user-led facilitator to work with the steering group and a Finance Manager.

The organisational support for management which this grant provided enabled Senior Management to concentrate on Advocacy Matters' 5-year Strategic Plan, ensuring that this is delivered successfully. User involvement and the service user facilitation role are of vital importance to Advocacy Matters as a user-led organisation. A better communication channel between beneficiaries and management/trustees to drive forward a user led strategic plan and business plan.

The other Resilience grant was used to ensure Advocacy Matters becomes a resilient charity and a road map for change has been developed. Consultants have been employed to develop a Theory of Change for the charity and a communication strategy. The theory of change has solidified our goals and purpose. We have also had consultancy support to develop cases for support for funding bids and to identify potential funders. We have also been able to pay for all staff members to complete the Independent Advocacy Qualification and complete the Quality Performance Mark in advocacy from NDTI.

The money for the Main Grant and the Resilience Grant was used by 31st March 2023.

6. Birmingham City Council Creative City Grant

Advocacy Matters Steering Group of disabled people in conjunction with community groups across Birmingham created a bespoke film and portable screen experience for the Commonwealth Games. Advocacy Matters was chosen, alongside 106 other community groups, to receive a *Creative City* project grant, thanks to funding from *Birmingham City Council*. In partnership with *Blue and White Creative*, delivered by the *Bostin' Creative Arts & Theatre* team, Advocacy Matters made a short film *Personal Best*, which was screened and shared as part of the *Commonwealth Games Birmingham 2022 Festival*.

7. Childrens Age Assessments- Appropriate Adult

The age assessment of unaccompanied children seeking asylum is a challenging process and is there to establish if the individual will be supported as a child or adult. Often Children and young people seeking asylum do not have documentation with proof of age and sometimes are not aware of how old they are or their birthdate. A child or young person undergoing an age assessment must have the opportunity to have an appropriate adult present with them during the interviews. It is important that the role of the appropriate adult is clearly explained at the outset of the interviews, and it is recommended that the same appropriate adult is used throughout the age assessment.

Advocacy Matters were awarded a contract to provide this service from Birmingham Children's Trust in January 2023. As of 31st of March 2023 we are still awaiting our first referrals.

Financial review

The results for the year are set out in the attached Financial Statements and Notes. The net movement of funds for the period amounted to a surplus of £7,392. The total retained reserves at 31st March 2023 amounted to £591,524.

It is the policy of the Charity that unrestricted funds which have not been designated for a specific use should be maintained at a level equivalent to between three and six month's expenditure. The Trustees consider that reserves at this level will ensure that, in the event of a significant drop in funding, they will be able to continue the Charity's current activities while consideration is given to ways in which additional funds may be raised. This level of reserves has been maintained throughout the year.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

The trustees periodically review the reserves position of the charity to ascertain whether or not the funds that they are holding are adequate for its work. In doing this they take into consideration the financial risks to which the charity is subject, the assets and working capital requirements for continued service delivery and for unforeseen circumstances, particularly relating to uncertainties of future funding.

A further major consideration is the drastic change in the way that many projects are being funded. In many cases remuneration is on a per hour or per referral basis with payment in arrears with no guarantee of the number of referrals which will be required. This places all the risk on to the provider and could have a catastrophic effect on the charity's funds if things go wrong.

At 31 March 2023 the charity had reserves of £591,524 of which £514,847 were unrestricted. The trustees have reviewed whether unrestricted funds can be applied for public benefit whilst maintaining an appropriate level of free reserves. The trustees are of the opinion that free reserves (reserves available for working capital, development and provision of the service) should be at least six months costs of running the organisation. The trustees therefore consider that the free reserves are adequate.

Plans for future periods

The trustees will continue to seek new projects which are suitable and beneficial to the community of people with disabilities, which are consistent with the charity's aims and objectives, and which deliver public benefit to all members of the community.

Despite the reduction in funding from Local Authorities generally and the reluctance of other potential funders to fund non-statutory advocacy we have been successful in maintain local authority and grant funding. However this does not means that different approaches to fundraising aren't required if the charity is to mitigate risk and remain sustainable with adequate levels of funding and this is now a priority which is being addressed.

One of the Objects of the charity is to advance education, by providing training in advocacy skills and disability issues. This training is now handled by the Volunteer Advocacy Training section of the Birmingham Advocacy Hub (see 4 above) and will continue to be a priority. A brief outline of the type of facilities which could be provided is available on the charity's website. This training will normally be provided to other advocacy organisations or health professionals to the ultimate public benefit of the disabled community.

The training of professionals in disability awareness under the Working with Learning Disabled Parents project, which took place some time ago, has shown the necessity of such training and the charity will continue to look for similar opportunities.

We have applied to The Lottery Community Fund to work with young disabled people 13-18 in transition from children to adult services as we have in the past. This will focus on the Walsall area where there is the greatest need and deprivation.

We have also applied to The Lottery to work with isolated older adults to ensure they live an active and fulfilling life as long as possible.

Structure, governance and management

The Charity is a company limited by guarantee. The trustees/directors named on page 1 are also the only members of the company. In the event of the company being wound up, their liability in respect of the guarantee is limited to £1 each.

The charity was incorporated on 12th March 2012 and is governed by its Memorandum and Articles of Association. The company was formed specifically to take over the operations of Advocacy Matters, an unincorporated charity which has since been decommissioned. The company commenced operations on 1st October 2012 at which point any remaining assets or liabilities of the unincorporated charity were transferred to the company.

ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Mrs J A Steckles - Chair

Mr R Punton

Mr P Shergold

Mr R Netherway

Mr Gordon Law

Mr C Chadwick

Mr A M Parker

(Resigned 27 January 2023)

(Resigned 27 January 2023)

The charity is governed by an Executive Committee comprising all the Trustees who are also Directors and the only members of the company. During the year under review, the day-to-day management of the charity was undertaken by the Chief Executive Officer with the assistance of three Operations Managers and two Senior Advocates.

Where there is a requirement for a new trustee, candidates will normally be identified from recommendations by existing trustees or Operations Managers, particularly bearing in mind the skills and experience which such candidates would bring in areas which are beneficial to the charity but may not necessarily be represented by the existing trustees. Potential new trustees will usually be interviewed by the Chair and one of the Chief Executive who will explain the concept of advocacy and the aims and objectives of the charity. They are also informed of their legal obligations under charity and company law, the Charity Commission guidance on public benefit and are provided with leaflets from the Charity Commission so that they are aware of their roles and responsibilities before they decide to take on the role. Successful candidates are invited to attend the next trustees' meeting as observers and are provided with a copy of the Memorandum and Articles of Association.

New trustees are voted in by the Executive Committee and appointments are subject to Enhanced Disclosure and Barring Scheme checks. New trustees are provided with a trustee Induction Pack and offered Trustee training. Advocacy Training is available to ensure the new trustee is fully aware of the meaning of advocacy.

All members of the Executive Committee give their time voluntarily and do not receive any benefits from the charity. Note 7 to the accounts shows any expenses claimed by the Trustees during the period.

The Steering Group, which is incorporated into the My Side project, ensures that the charity remains "user led" and provides an important element of the charity's structure and governance.

Risk management

The Trustees continually assess the risks to which the charity and its staff are exposed. This has been more relevant than ever because of the potential dangers of COVID 19. Where appropriate, systems, policies and procedures have been implemented to reduce these risks. They cover areas such as health and safety of staff, volunteers and visitors and lone working for staff and volunteers. These policies and procedures are regularly reviewed to ensure they are up to date and cover all areas involving the charity. All staff and volunteer appointments are subject to Enhanced Disclosure and Barring Scheme checks and full training is given to safeguard not only the safety of staff and volunteers but also the users for whom they may be advocating. A written risk assessments are carried out for every disabled person who is to be supported by a member of staff or volunteer and is held on file.

Risk Assessments relating to the office are carried out annually and Health and Safety is included on the Agenda of Staff Meetings.

Financial Risk is a major consideration for a small charity and liquid funds and reserves are regularly reviewed to ensure that there is sufficient working capital for the charity's needs. This includes the ability to finance the expenditure for those projects where payment for services is made in arrears.

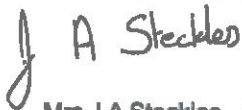
ADVOCACY MATTERS LTD

TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 MARCH 2023

Pay policy

The trustees consider the Chief Executive Officer and the three Operations Managers to be key management personnel but the pay policy for these key personnel is the same as for other staff. The pay of all staff is reviewed annually and will normally be increased in line with, or above, average earnings benchmarked against similar roles at other charities or the public sector, with a view to ensuring that they are paid at least as well as those benchmarks.

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



**Mrs J A Steckles - Chair
Chair of Trustees**

27 October 2023

ADVOCACY MATTERS LTD

STATEMENT OF TRUSTEES' RESPONSIBILITIES

FOR THE YEAR ENDED 31 MARCH 2023

The Trustees, who are also the directors of Advocacy Matters Ltd for the purpose of company law, are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (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 Charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in operation.

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

Insofar as the trustees are aware:

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

The strategic report under the Companies Act 2006 (Strategic Report and Directors' Report) Regulations 2013 is not required as the charity qualifies as a small charitable company.

ADVOCACY MATTERS LTD

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF ADVOCACY MATTERS LTD

I report to the Trustees on my examination of the financial statements of Advocacy Matters Ltd (the Charity) for the year ended 31 March 2023.

Responsibilities and basis of report

As the Trustees of the Charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the financial statements of the Charity 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 the Charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

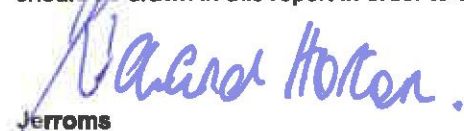
Independent examiner's statement

Since the Charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of , 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 that in any material respect:

- 1 accounting records were not kept in respect of the Charity as required by section 386 of the 2006 Act; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements 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 financial statements 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 financial statements to be reached.



Jerrons

Richard Alan Horton

Chartered Certified Accountant

Lumanerl House
Blythe Gate
Blythe Valley Park
Sollihull
West Midlands
B90 8AH

Dated: 27 October 2023

ADVOCACY MATTERS LTD

STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 MARCH 2023

	Notes	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds 2022 £	Restricted funds 2022 £	Total 2022 £
Income from:							
Donations and legacies	3	-	9,720	9,720	34,976	-	34,976
Charitable activities	4	538,531	114,080	652,611	454,348	178,678	633,026
Other trading activities	5	1,369	-	1,369	5,993	-	5,993
Investments	6	769	-	769	82	-	82
Total income		540,669	123,800	664,469	495,399	178,678	674,077
Expenditure on:							
Raising funds	7	16,862	-	16,862	7,109	-	7,109
Charitable activities	8	438,064	202,151	640,215	381,987	90,400	472,387
Total expenditure		454,926	202,151	657,077	389,096	90,400	479,496
Net incoming/(outgoing) resources before transfers		85,743	(78,351)	7,392	106,303	88,278	194,581
Gross transfers between funds		4,248	(4,248)	-	5,650	(5,650)	-
Net income/(expenditure) for the year/							
Net movement in funds		89,991	(82,599)	7,392	111,953	82,628	194,581
Fund balances at 1 April 2022		424,856	159,276	584,132	312,903	76,648	389,551
Fund balances at 31 March 2023		514,847	76,677	591,524	424,856	159,276	584,132

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

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

ADVOCACY MATTERS LTD

BALANCE SHEET

AS AT 31 MARCH 2023

	Notes	2023 £	£	2022 £	£
Fixed assets					
Tangible assets	12		9,407		6,688
Current assets					
Debtors	13	42,890		43,343	
Cash at bank and in hand		541,706		536,948	
		584,596		580,291	
Creditors: amounts falling due within one year	14	(2,479)		(2,847)	
Net current assets			582,117		577,444
Total assets less current liabilities			591,524		584,132
Income funds					
Restricted funds	16		76,677		159,276
Unrestricted funds			514,847		424,856
			591,524		584,132

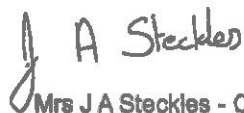
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2023.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 27 October 2023


Mrs J A Steckles - Chair
Trustee

Company registration number 07987156

ADVOCACY MATTERS LTD

STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 MARCH 2023

	Notes	2023 £	£	2022 £	£
Cash flows from operating activities					
Cash generated from operations	19		13,115		205,792
Investing activities					
Purchase of tangible fixed assets		(9,126)		(3,702)	
Investment income received		769		82	
Net cash used in investing activities			(8,357)		(3,620)
Net cash used in financing activities			-		-
Net increase in cash and cash equivalents			4,758		202,172
Cash and cash equivalents at beginning of year			536,948		334,776
Cash and cash equivalents at end of year			541,706		536,948

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies

Charity Information

Advocacy Matters Ltd is a private company limited by guarantee incorporated in England and Wales. The registered office is 198 Boldmere Road, Sutton Coldfield, West Midlands, B73 5UE.

1.1 Accounting convention

The financial statements have been prepared in accordance with the Charity's [governing document], the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the Charities SORP "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). The Charity is a Public Benefit Entity as defined by FRS 102.

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

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

1.2 Going concern

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

1.3 Charitable funds

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

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

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

1.4 Income

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

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

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

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies

(Continued)

1.5 Expenditure

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, 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 classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges are allocated on the portion of the asset's use.

1.6 Tangible fixed assets

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

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

Plant and equipment	3 years straight line
Fixtures and fittings	3 years straight line

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

1.7 Impairment of fixed assets

At each reporting end date, the Charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

1.8 Cash and cash equivalents

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

1.9 Financial Instruments

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

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

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

Basic financial assets

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

1 Accounting policies

(Continued)

Basic financial liabilities

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

Derecognition of financial liabilities

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

3 Donations and legacies

	Restricted funds	Unrestricted funds
	2023	2022
	£	£
Donations and gifts	9,720	34,976

ADVOCACY MATTERS LTD

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

4 Charitable activities

	Charitable Income 2023 £	Charitable Income 2022 £
POhWER Contract	498,767	411,721
Physical Disability	39,764	42,627
Income from charitable activities	114,080	178,678
	<u>652,611</u>	<u>633,026</u>
Analysis by fund		
Unrestricted funds	538,531	454,348
Restricted funds	114,080	178,678
	<u>652,611</u>	<u>633,026</u>

5 Other trading activities

	Unrestricted funds 2023 £	Unrestricted funds 2022 £
Fundraising events	<u>1,369</u>	<u>5,993</u>

6 Investments

	Unrestricted funds 2023 £	Unrestricted funds 2022 £
Interest receivable	<u>769</u>	<u>82</u>

ADVOCACY MATTERS LTD

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

7 Raising funds

	Unrestricted funds	Unrestricted funds
	2023	2022
	£	£
<u>Fundraising and publicity</u>		
Raising funds	8,763	5,692
Staff costs	8,099	1,417
Fundraising and publicity	16,862	7,109
	<u>16,862</u>	<u>7,109</u>

ADVOCACY MATTERS LTD

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

8 Charitable activities

	Charitable Expenditure		Governance costs		Admin costs		Depreciation		Total 2023	Charitable Expenditure		Governance costs		Admin costs		Total 2022
	2023	£	2023	£	2023	£	2023	£	£	2022	£	2022	£	2022	£	£
Staff costs	146,128		17,401		322,555		-		486,084	76,989		24,867		302,421		404,257
Depreciation and impairment	-		-		-		6,407		6,407	-		-		-		-
Charitable activities	56,024		-		19,173		-		75,197	13,431		-		30,577		44,008
	202,152		17,401		341,728		6,407		567,688	90,400		24,867		332,998		448,265
Share of support costs (see note)	67,383		-		-		-		67,383	14,861		-		-		14,861
Share of governance costs (see note)	-		5,144		-		-		5,144	-		9,261		-		9,261
	269,535		22,545		341,728		6,407		640,215	105,261		34,128		332,998		472,387
Analysis by fund																
Unrestricted funds	67,384		22,545		341,728		6,407		438,064	14,861		34,128		332,998		381,987
Restricted funds	202,151		-		-		-		202,151	90,400		-		-		90,400
	269,535		22,545		341,728		6,407		640,215	105,261		34,128		332,998		472,387

ADVOCACY MATTERS LTD

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

9 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

10 Employees

The average monthly number of employees during the year was:

	2023 Number	2022 Number
	21	18
Employment costs	2023 £	2022 £
Wages and salaries	446,757	369,274
Social security costs	31,875	25,760
Other pension costs	15,551	10,640
	494,183	405,674

There were no employees whose annual remuneration was more than £60,000.

11 Taxation

The charity is exempt from tax on income and gains falling within section 505 of the Taxes Act 1988 or section 252 of the Taxation of Chargeable Gains Act 1992 to the extent that these are applied to its charitable objects.

12 Tangible fixed assets

	Plant and equipment £	Fixtures and fittings £	Total £
Cost			
At 1 April 2022	66,327	14,698	81,025
Additions	-	9,126	9,126
At 31 March 2023	66,327	23,824	90,151
Depreciation and impairment			
At 1 April 2022	59,639	14,698	74,337
Depreciation charged in the year	3,365	3,042	6,407
At 31 March 2023	63,004	17,740	80,744
Carrying amount			
At 31 March 2023	3,323	6,084	9,407
At 31 March 2022	6,688	-	6,688

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

13 Debtors

	2023 £	2022 £
Amounts falling due within one year:		
Trade debtors	42,890	39,180
Prepayments and accrued income	-	4,163
	<u>42,890</u>	<u>43,343</u>

14 Creditors: amounts falling due within one year

	2023 £	2022 £
Trade creditors	(521)	517
Accruals and deferred income	3,000	2,330
	<u>2,479</u>	<u>2,847</u>

15 Retirement benefit schemes

Defined contribution schemes

The Charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the Charity in an independently administered fund.

The charge to profit or loss in respect of defined contribution schemes was £15,551 (2022 - £10,640).

ADVOCACY MATTERS LTD

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

16 Restricted funds

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

	Balance at 1 April 2021 £	Movement in funds			Balance at 1 April 2022 £	Movement in funds			Transfers £	Balance at 31 March 2023 £
		Incoming resources £	Resources expended £	Transfers £		Incoming resources £	Resources expended £	Transfers £		
Walsall Care Act	-	59,070	(53,419)	(5,651)	-	60,609	(56,332)	(4,277)	-	-
CAF Resilience Grants	-	119,609	(36,981)	-	82,628	46,536	(129,164)	-	-	-
Crisis Advocacy	34,374	-	-	-	34,374	-	-	-	-	34,374
Moving on Project	42,303	-	-	-	42,303	-	-	-	-	42,303
Next Stop	(4,885)	-	-	-	(4,885)	-	-	4,885	-	-
Working with Learning Disabled Parents	4,856	-	-	-	4,856	-	-	(4,856)	-	-
Creative City - Personal Best	-	-	-	-	-	10,280	(10,280)	-	-	-
Training Costs - Sutton Charities	-	-	-	-	-	6,375	(6,375)	-	-	-
	76,648	178,679	(90,400)	(5,651)	159,276	123,800	(202,151)	(4,248)	76,677	

ADVOCACY MATTERS LTD

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2023

17 Analysis of net assets between funds

	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds 2022 £	Restricted funds 2022 £	Total 2022 £
Fund balances at 31 March 2023 are represented by:						
Tangible assets	9,407	-	9,407	6,688	-	6,688
Current assets/(liabilities)	505,440	76,677	582,117	418,168	159,276	577,444
	<u>514,847</u>	<u>76,677</u>	<u>591,524</u>	<u>424,856</u>	<u>159,276</u>	<u>584,132</u>

18 Related party transactions

There were no disclosable related party transactions during the year (2022 - none).

19 Cash generated from operations

	2023 £	2022 £
Surplus for the year	7,392	194,581
Adjustments for:		
Investment income recognised in statement of financial activities	(769)	(82)
Depreciation and impairment of tangible fixed assets	6,407	3,551
Movements in working capital:		
Decrease in debtors	453	7,487
(Decrease)/Increase in creditors	(368)	255
Cash generated from operations	<u>13,115</u>	<u>205,792</u>

20 Analysis of changes in net funds

The Charity had no debt during the year.

ADVOCACY MATTERS LTD

England & Wales - Charity number 1148198

Accounts

ADVOCACY MATTERS LTD

A company limited by guarantee

Charity Number 1148198

Company Number 07987156

**Trustees' Report and Accounts
for the year ended 31st March 2022**

Contents

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ADVOCACY MATTERS

LEGAL AND ADMINISTRATION

Full Name:	Advocacy Matters Ltd
Legal Status	Company Limited by Guarantee
Charity Number:	1148198
Company Number:	07987156
Date of Incorporation:	12 th March 2012
Governing Document:	Memorandum and Articles of Association
Registered Address:	198 Boldmere Road Boldmere Sutton Coldfield West Midlands B73 5UE
Telephone Number:	0121 321 2377
Fax Number:	0121 321 2396
E-mail Address:	info@advocacymatters.co.uk
Website	www.advocacymatters.org.uk

Trustee Directors (Trustees) and Advisors

Trustees:	J Steckles	Chair
	C Chadwick	Treasurer
	G Law	
	A Parker	
	R Netherway	
	P Shergold	Appointed 6 th May 2021

Chief Executive Officer E Keegan

Bankers Lloyds TSB
9 Birmingham Road
Sutton Coldfield
West Midlands
B72 1QA

Independent Examiner Jerroms
Suite 1 The Gardens
Coleshill Manor Office Campus
South Drive
Coleshill
England
B46 1DL

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2022

The trustees of Advocacy Matters Ltd present their report and the independently examined financial statements of the charity for the year ended 31st March 2022. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland, published 16th July 2014.

Legal Status of the Charity

The charity is a company Limited by Guarantee incorporated on 12th March 2012 and is governed by its Memorandum and Articles of Association. The company was formed specifically to take over the operations of Advocacy Matters, an unincorporated charity which has since been decommissioned. The company commenced operations on 1st October 2012 at which point any remaining assets or liabilities of the unincorporated charity were transferred to the company.

Members' Liability

The charity is a company limited by Guarantee. The trustees/directors named on page 1 are also the only members of the company. In the event of the company being wound up, their liability in respect of the guarantee is limited to £1 each.

Mission Statement

To provide Disabled People with an independent advocate to ensure individuals are heard and their rights, concerns and needs are acted upon.

Objects of the Charity

The objects of the charity as set out in its Articles of Association are:

1. To promote the relief of the physical and mental sickness of persons in need by reason of addiction, bereavement or loss, and to promote social inclusion for the public benefit by preventing people from becoming socially excluded, relieving the needs of those people who are socially excluded, assisting them to integrate into society with the object of improving their conditions of life by the provision of an advocacy service in the counties of the West Midlands, Warwickshire, Worcestershire, Staffordshire and Herefordshire or elsewhere in England and Wales, where need is identified, and additional support with the object of improving their conditions of life.

For the purpose of this clause, 'socially excluded' means being excluded from society or parts of society as a result of one or more of the following factors: unemployment; financial hardship; youth and old age; ill health, (physical or mental); substance abuse or dependency, including alcohol and drugs; discrimination on the grounds of sex, race, disability, ethnic origin, religion, belief, creed, sexual orientation, gender reassignment, poor education or skills attainment; relationship and family breakdown; poor housing (that is housing that does not meet basic habitable standards); crime (i.e. either as a victim of crime or as an offender rehabilitating into society).

2. To advance education, in particular training in advocacy skills and disability issues, throughout the UK.

In support of these objects, the charity will provide advocacy to all disabled people although the requirements of funders may restrict either the geographical area or type of disability for particular projects.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2022

Objects of the Charity (Continued)

When projects are first established, great care is taken to ensure that they are consistent with the aims and objectives of the charity and the trustees give careful consideration to the Charity Commission's general guidance on public benefit. Each case is also reviewed regularly by management in supervision with the advocate responsible to ensure that these requirements continue to be met.

The advocacy provided is completely independent and is not subject to the direction or approval of the funder. Funds available and advocates' time will also restrict the numbers to whom advocacy can be provided. Subject to these limits, the projects are for the benefit of all members of the disabled community irrespective of ethnicity, gender or sexuality and, except in unusual circumstances such as referrals by a solicitor, advocacy is provided without charge to the recipient. Applicants are dealt with on a first come, first served basis except where a crisis situation or other complex issues may require immediate action.

Each project is reviewed annually to ensure that it continues to reflect the charity objectives and has delivered benefits to the group of people the project was set up to help.

Structure, Governance and Management

The charity is governed by an Executive Committee comprising all the Trustees who are also Directors and the only members of the company. During the year under review, the day-to-day management of the charity was undertaken by the Chief Executive Officer with the assistance of three Operations Managers.

Where there is a requirement for a new trustee, candidates will normally be identified from recommendations by existing trustees or Operations Managers, particularly bearing in mind the skills and experience which such candidates would bring in areas which are beneficial to the charity but may not necessarily be represented by the existing trustees. Potential new trustees will usually be interviewed by the Chair and one of the Operations Managers who will explain the concept of advocacy and the aims and objectives of the charity. They are also informed of their legal obligations under charity and company law, the Charity Commission guidance on public benefit and are provided with leaflets from the Charity Commission so that they are aware of their roles and responsibilities before they decide to take on the role. Successful candidates are invited to attend the next trustees' meeting as observers and are provided with a copy of the Memorandum and Articles of Association.

New trustees are voted in by the Executive Committee and appointments are subject to Enhanced Disclosure and Barring Scheme checks. New trustees are provided with a trustee Induction Pack and Advocacy Training is available to ensure the new trustee is fully aware of the meaning of advocacy.

All members of the Executive Committee give their time voluntarily and do not receive any benefits from the charity. Note 7 to the accounts shows any expenses claimed by the Trustees during the period.

The Steering Group, which is incorporated into the My Side project, ensures that the charity remains "user led" and provides an important element of the charity's structure and governance.

Risk Management

The Trustees continually assess the risks to which the charity and its staff are exposed. This has been more relevant than ever because of the potential dangers of COVID 19. Where appropriate, systems, policies and procedures have been implemented to reduce these risks. They cover areas such as health and safety of staff, volunteers and visitors and lone working for staff and volunteers. These policies and procedures are regularly reviewed to ensure they are up to date and cover all areas involving the charity. All staff and volunteer appointments are subject to Enhanced Disclosure and Barring Scheme checks and full training is given to safeguard not only the safety of staff and volunteers but also the users for whom they may be advocating. A written risk assessment is carried out for every disabled person who is to be supported by a member of staff or volunteer and is held on file.

Risk Assessments relating to the office are carried out annually and Health and Safety is included on the Agenda of Staff Meetings.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2022

Risk Management (Continued)

Financial Risk is a major consideration for a small charity and liquid funds and reserves are regularly reviewed to ensure that there is sufficient working capital for the charity's needs. This includes the ability to finance the expenditure for those projects where payment for services is made in arrears.

Pay Policy

The trustees consider the Chief Executive Officer and the three Operations Managers to be key management personnel but the pay policy for these key personnel is the same as for other staff. The pay of all staff is reviewed annually and will normally be increased in line with, or above, average earnings benchmarked against similar roles at other charities or the public sector, with a view to ensuring that they are paid at least as well as those benchmarks.

Achievements and Performance

The year under review has again been extremely challenging, particularly because of COVID 19 but, yet again, managers and staff have responded well to all the problems with which they have been faced. They had particularly been affected by not being able to carry out face to face meetings. These began to resume within this period.

Advocates continue to raise Safeguarding issues on several of the projects where there appears to be abuse of their disabled partners. Whilst these cases have resulted in the greater awareness of such problems and have also resulted in the improvement of safeguarding procedures and in the scrutiny of care providers, progress has been frustratingly slow. Incidents such as these, which can often lead to protracted investigations, emphasise the need for greater diligence and the importance of independent advocacy.

As a result of the independent advocacy provided by Advocacy Matters, care provision is often challenged, enabling individuals to be heard who might not otherwise have a voice.

Projects

The following is a brief review for the period of each of the major projects run by Advocacy Matters.

1. My Side

The trustees consider this type of project and particularly the training and employment of volunteers to be a fundamental part of the DNA of Advocacy Matters and have agreed to continue to fund the project from Unrestricted Funds but with reduced numbers and mainly by trained Volunteers.

We have provided a range of different services on this project including one to one advocacy casework, group work, volunteer training, support, supervision, attendance at events and the continued promotion of our work. The project also facilitates user groups of vulnerable adults across Birmingham and Walsall. During the year support was given by 42 Volunteers covering this range of activities and Independent Advocacy support was given to 48 people.

One of the project's aims is to recruit and train volunteer advocates. This recruitment has continued and a number of carefully vetted and trained volunteer advocates are undertaking advocacy work with careful support and supervision.

There is still a clear demand for non-statutory advocacy work in Birmingham and we continue to be a much-needed service for support for vulnerable individuals who do not meet the eligibility for statutory advocacy. Even with this restricted capacity we have been able to provide independent advocacy for 48 users, but this still leaves a huge number of vulnerable people in Birmingham for whom no independent advocacy is available

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2022

Achievements and Performance (Continued)

1. My Side (Continued)

The training element of this project has largely passed to the Volunteer Advocacy Training section of the Birmingham Advocacy Hub, see 4 below.

The Steering Group is an important part of this project and provides input into the charity's governance from all areas of Birmingham and Walsall. It functions to provide former and current advocacy partners with the opportunity to access peer advocacy as well as develop self-advocacy skills. The purpose of the group is to address common barriers that prevent people accessing facilities in their local communities. Members are actively involved in such matters as the interviewing of all new staff, the provision of advice as to what accessible information should be provided by the charity, the design and content of the accessible information documentation produced and in contributing to the development of future projects for which the charity applies for funding.

In this financial year we have received grants from Awards for All, Arnold Clark and Garfield Weston to support out volunteering work. We received money from Birmingham Airport to purchase computers. For volunteers.

2. Physical Disability Advocacy

This project is now being funded by Birmingham and Solihull Clinical Commissioning Group has again been extended. The project provides support for people who have experienced strokes or have other long-term, chronic conditions, including certain physical disabilities arising from spinal injuries, amputations, neurological conditions, traumatic brain injury etc.

During the year to 31st March 2022, support with Independent Advocacy was provided to 58 people and a range of development activities were carried out at Queen Elizabeth and Good Hope hospitals, GP surgeries, the Health Exchange and others.

3. Walsall Care Act Advocacy

The nature and scope of this project is the same as that of the Birmingham Care Act Advocacy project, see 4 below, albeit on a smaller scale. The arrangement is direct with Walsall Metropolitan Borough Council.

During the year under review, support was provided for 240 individuals.

4. Birmingham Advocacy Hub

Birmingham City Council issued a tender encompassing not only statutory advocacy but also a pre-defined amount of non-statutory advocacy and volunteer training. This project was awarded to POhWER, a national advocacy provider.

Advocacy Matters entered into a partnership agreement with POhWER to provide Advocacy Services on an agreed basis. This project commenced on 1st April 2019 and is of critical importance to Advocacy Matters. It incorporated the Care Act, IMCA, and a substantial part of the My Side projects which represented most of the charity's existing business. In addition other statutory advocacy and some non-statutory advocacy is also included.

A summary of each of the elements of the project is given below.

**ADVOCACY MATTERS LTD
TRUSTEES' REPORT**

For the year ended 31st March 2022

Achievements and Performance (Continued)

4. Birmingham Advocacy Hub (Continued)

Care Act Advocacy

Care Act Advocacy is a form of statutory Advocacy governed by the Care Act 2014 whereby local authorities must arrange an independent advocate to facilitate the involvement of a person in their assessment, in the preparation of their care and support plan, in the review of their care plan, and in appropriate safeguarding procedures. This independent advocacy must be implemented to provide assistance if the following two conditions are met:-

- Where the potential recipient has substantial difficulty in being fully involved in these processes
- Where there is no one appropriate available to support and represent the person's wishes.

The role of the independent advocate is to support and represent the person and to facilitate their involvement in the key processes and interactions with the local authority. Acting as an advocate for a person who has substantial difficulty in engaging with care and support processes is a responsible position.

This work includes:-

- Assisting a person to understand the assessment, the care and support planning and the review processes. This requires advocates to understand local authority policies and processes, the available assessment tools, the planning options and the options available at the review of a care or support plan. It may involve advocates spending considerable time with the individual, considering their communications needs, their wishes and feelings and their life story, and using all this to assist the person to be involved and where possible to make decisions.
- Assisting a person to communicate their views, wishes and feelings to the staff who are carrying out an assessment or developing a care or support plan or reviewing an existing plan.
- Assisting a person to understand how their needs can be met by the local authority or otherwise – understanding, for example, how a plan can be personalised, how it can be tailored to meet specific needs, how it can be creative and inclusive and how it can be used to promote a person's rights to liberty and to family life.
- Assisting the person to make decisions about their care and support arrangements – assisting them to weigh up various care and support options and to choose the ones that best meet the person's needs and wishes.
- Assisting the person to understand their rights under the Care Act – for an assessment which considers their wishes and feelings and which considers the views of other people; their right to have their eligible needs met and to have a care or support plan that reflects their needs and their preferences. Also assisting the person to understand their wider rights, including their rights to liberty and family life. A person's rights are complemented by the local authority's duties, for example, to involve the person, to meet needs in a way that is least restrictive of a person's rights.
- Assisting a person to challenge a decision made by the local authority; and where a person cannot challenge the decision even with assistance, then to challenge it on their behalf.

Independent Mental Capacity Advocacy (IMCA)

The Mental Capacity Act came into force in April 2007 introducing statutory independent advocacy and imposing on the NHS and Local Authorities the duty to consult in defined situations concerning vulnerable individuals. IMCA requires the provision of non-instructed advocacy to individuals, aged 16 and over, who have been assessed to lack capacity for specific decisions and who have no family or friends who might otherwise advocate on their behalf.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2022

Birmingham Advocacy Hub (Continued)

Independent Mental Capacity Advocacy (Continued)

This may include those with learning difficulties, dementia, mental health problems, acquired brain injury and cognitive impairments associated with serious physical illness.

IMCA is a very specialist form of advocacy and all advocates involved in this form of advocacy are required to undertake specialist training.

IMCA advocates will also be involved in any Safeguarding aspects related to Deprivation of Liberty (DoLs) under the Mental Capacity Act 2009.

Independent Mental Health Advocacy (IMHA)

IMHA is covered by Mental Health Act Revision 2007 and relates to inpatients held under a section of the Mental Health Act 1983.

Independent Complaints Advocacy Service (ICAS)

National Health Complaints are the statutory responsibility of the National Health Service but these are commissioned through Public Health England and the local authority.

Community Advocacy

Community Advocacy applies to all issues that vulnerable people face which fall outside the above legislation.

Volunteer Advocacy Training

One of the forms of advocacy which Birmingham City Council are keen to support is advocacy by volunteers which they are promoting by supporting the training of potential new advocates.

1592 referrals were dealt with during the period and 4 training courses were held providing volunteer training for 48 participants.

5. Charities Aid Foundation Resilience Grants

The Main Grant was awarded in October 2021. This was used to employ staff needed to make Advocacy Matters a robust charity. Using this grant we have appointed a full time senior advocate, a user-led facilitator to work with the steering group and a Finance Manager.

The organisational support for management which this grant provided enabled Senior Management to concentrate on Advocacy Matters' 5-year Strategic Plan, ensuring that this is delivered successfully. User involvement and the service user facilitation role are of vital importance to Advocacy Matters as a user-led organisation. A better communication channel between beneficiaries and management/trustees to drive forward a user led strategic plan and business plan.

The other Resilience grant was used to ensure Advocacy Matters becomes a resilient charity and a road map for change has been developed. Consultants have been employed to develop a Theory of Change for the charity and a communication strategy. The theory of change has solidified our goals and purpose. We have also had consultancy support to develop cases for support for funding bids and to identify potential funders.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2022

6. Birmingham City Council Creative City Grant

Advocacy Matters Steering Group of disabled people in conjunction with community groups across Birmingham created a bespoke film and portable screen experience for the Commonwealth Games. Advocacy Matters was chosen, alongside 106 other community groups, to receive a *Creative City* project grant, thanks to funding from *Birmingham City Council*. In partnership with *Blue and White Creative*, delivered by the *Bostin' Creative Arts & Theatre* team, Advocacy Matters made a short film, which was screened and shared as part of the Commonwealth Games *Birmingham 2022 Festival*.

Financial Results

The results for the year are set out in the attached Financial Statements and Notes. The net movement of funds for the period amounted to a surplus of £194,582. The total retained reserves at 31st March 2022 amounted to £584,133.

Reserves

The trustees periodically review the reserves position of the charity to ascertain whether or not the funds that they are holding are adequate for its work. In doing this they take into consideration the financial risks to which the charity is subject, the assets and working capital requirements for continued service delivery and for unforeseen circumstances, particularly relating to uncertainties of future funding.

A further major consideration is the drastic change in the way that many projects are being funded. In many cases remuneration is on a per hour or per referral basis with payment in arrears with no guarantee of the number of referrals which will be required. This places all the risk on to the provider and could have a catastrophic effect on the charity's funds if things go wrong.

At 31 March 2022 the charity had reserves of £584,133 of which £424,856 were unrestricted. The trustees have reviewed whether unrestricted funds can be applied for public benefit whilst maintaining an appropriate level of free reserves. The trustees are of the opinion that free reserves (reserves available for working capital, development and provision of the service) should be at least six months costs of running the organisation which currently equates to £239,748. The trustees therefore consider that the free reserves are adequate.

Subsequent Events

A number of funding bids have been submitted, some of which have been successful and others which have not yet been awarded but look very hopeful.

Plans for Future Periods

The trustees will continue to seek new projects which are suitable and beneficial to the community of people with disabilities, which are consistent with the charity's aims and objectives and which deliver public benefit to all members of the community.

The reduction in funding from Local Authorities generally and the reluctance of other potential funders to fund non-statutory advocacy means that different approaches to fundraising are required if the charity is to remain sustainable with adequate levels of funding and this is now a priority which is being urgently addressed.

One of the Objects of the charity is to advance education, in particular by providing training in advocacy skills and disability issues. This training is now handled by the Volunteer Advocacy Training section of the Birmingham Advocacy Hub (see 4 above) and will continue to be a priority. A brief outline of the type of facilities which could be provided is available on the charity's website. This training will normally be provided to other advocacy organisations or health professionals to the ultimate public benefit of the disabled community as a whole.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2022

Plans for Future Periods (Continued)

The training of professionals in disability awareness under the Working with Learning Disabled Parents project, which took place some time ago, has shown the necessity of such training and the charity will continue to look for similar opportunities. In the meantime, the provision of training for professionals working with learning disabled parents is taking place on an as and when required basis.

We have plans to apply for grants to work with young disabled people 13-18 in transition from children's to adult services as we have in the past. This will focus on the Walsall area where there is the greatest need and deprivation.

Statement of Trustees' Responsibilities

The trustees (who are also directors of Advocacy Matters Ltd for the purposes of company law) are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (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 incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing the 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 (FRS102);
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed subject to any material departures disclosed and explained in the financial statements.
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that 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.

Insofar as the trustees are aware:

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

The strategic report under the Companies Act 2006 (Strategic Report and Directors' Report) Regulations 2013 is not required as the charity qualifies as a small charitable company.

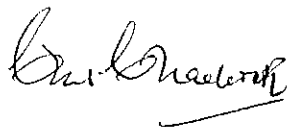
Independent Examiner

Jerroms Business Solutions Limited have indicated their willingness to act as Independent Examiner to the charitable company and were duly re-appointed.

**ADVOCACY MATTERS LTD
TRUSTEES' REPORT**

For the year ended 31st March 2022

This report was approved by the Trustees on 19th December 2022
and signed on their behalf by:-

A handwritten signature in black ink, appearing to read 'C Chadwick', with a horizontal line underneath.

C Chadwick
Trustee/Director

**ADVOCACY MATTERS LTD
TRUSTEES' REPORT**

**For the year ended 31st March 2022
ADVOACY MATTERS LTD**

Independent Examiner's Report to the Board of Advocacy Matters Ltd

I report to the Board on my examination of the financial statements of Advocacy Matters Ltd (the charity) for the year ended 31st March 2022.

Responsibilities and basis of report

As the Board of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the financial statements of the charity 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 the charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

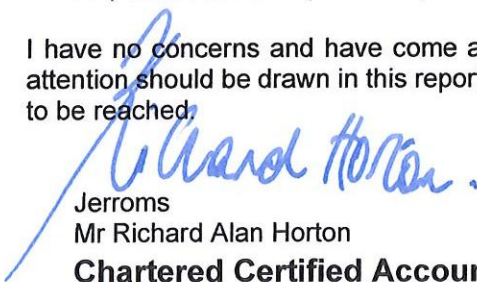
Independent Examiner's Statement

Since the charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of 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 that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act; or
2. the financial statements do not accord with those records; or
3. the financial statements 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 financial statements 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 financial statements to be reached.



Jerroms

Mr Richard Alan Horton

Chartered Certified Accountants

Suite 1
The Gardens
Coleshill Manor
Office Campus
South Drive
Coleshill
England
B46 1DL

Dated: 20th December 2022

**ADVOCACY MATTERS LTD
TRUSTEES' REPORT**

For the year ended 31st March 2022

	Notes	Restricted Funds £	Unrestricted Funds £	2022 £	2021 £
Income from :-					
Donations and Legacies	2		34,976	34,976	40,790
Generated Income	4		5,993	5,993	2,766
Income from Investments	5		82	82	132
Income from Charitable Activities	3	178,678	454,348	633,026	529,058
Total Income		<u>178,678</u>	<u>495,398</u>	<u>674,077</u>	<u>572,746</u>
Expenditure on:-					
Raising Funds			7,109	7,109	3,284
Charitable Activities		90,399	381,987	472,386	409,844
Total Expenditure		<u>90,399</u>	<u>389,096</u>	<u>479,495</u>	<u>413,128</u>
Net Income		88,279	106,302	194,582	159,618
Inter Fund Transfers	15	(5651)	5,651		
Net Movement in Funds		<u>82,629</u>	<u>111,953</u>	<u>194,582</u>	<u>159,618</u>
Total Funds Brought Forward	15	76,648	312,903	389,551	229,932
Total Funds Carried Forward	15	<u>159,277</u>	<u>424,856</u>	<u>584,133</u>	<u>389,550</u>

All recognised gains and losses are included in these accounts.

The notes on Pages 14 to 18 form part of these accounts.

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2022

ADVOCACY MATTERS LTD

Balance Sheet as at 31 March 2022

	Notes	2022	2021
		£	£
Fixed Assets			
Tangible fixed Assets	11	6,688	6,537
Current Assets			
Debtors	12	43,345	50,830
Cash at Bank and in hand		536,947	334,776
Total Current Assets		<u>580,292</u>	<u>385,606</u>
Current Liabilities - amounts falling due within one year			
Creditors	13	2,847	2,592
Total Current Liabilities -		<u>2,847</u>	<u>2,592</u>
Net Current Assets		577,445	383,014
Total Assets less Liabilities		<u>584,133</u>	<u>389,551</u>
Represented by Funds carried forward			
Unrestricted Funds	15	424,856	312,903
Restricted Funds	15	159,277	76,648
Total of Accumulated Funds carried forward		<u>584,133</u>	<u>389,551</u>

These Financial Statements have been prepared in accordance with special provisions of Part 15 of the Companies Act 2006 relating to small companies and in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1st January 2019).

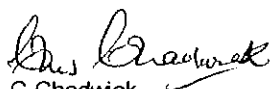
For the year ended 31 March 2022 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies.

No members have required the company to obtain an audit of its accounts for the year in question in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

Agreed by the Trustees on 19th December 2022
and signed on their behalf by:-


C Chadwick
Director/Trustee

The notes on Pages 14 to 18 form part of these Accounts.

Notes to the Accounts for the year ended 31st March 2022

1. Accounting Policies

Accounting Convention

The accounts are prepared on an historical cost basis and in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1st January 2019) and the Statement of Recommended Practice for Charities (SORP 102), the Charities Act 2011 and the Companies Act 2006. Advocacy Matters Ltd has taken advantage of the exemption in Financial Reporting Practice No. 1 from the requirement to produce a Cash Flow Statement on the grounds that it is a small charitable company.

Income

Incoming Resources include grants received from local government and other organisations and generated income which are accounted for on an accruals basis. Donations, gifts, donated services and other voluntary income are accounted for when received.

Expenditure

Resources expended are accounted for on an accruals basis. Costs relating to specific projects are allocated on a direct basis. Other costs are allocated on an estimated usage basis.

Tangible Fixed Assets

All Tangible Fixed Assets costing, or with an estimated cost of, at least £250 are valued at cost or a reasonable value on receipt and are depreciated on a straight-line basis over a period of three years.

2. Voluntary Income

	2022 £	2021 £
Donations	270	
Miscellaneous Advocacy	842	
Grants	33,800	40,290
Other Income	64	500
Total Voluntary Income	34,976	40,790

3. Incoming Resources from Charitable Activities

Restricted Income from Charitable Activities

Walsall Metropolitan Borough Council	59,070	58,611	
Walsall Care Act		59,070	58,611
Birmingham Children's Hospital		2,500	
Hear Me Out			2,500
Charities Aid Foundation	119,609		
CAF Resilience Grants		119,609	
Total Restricted Income from Charitable Activities	178,678	61,111	

Unrestricted Income from Charitable Activities

Birmingham Advocacy Hub	411,721	425,252	
POhWER Contract		411,721	425,252
Cross Birmingham Clinical Commissioning Group	42,627	42,696	
Physical Disability Advocacy		42,627	42,696
Total Unrestricted Income from Charitable Activities	454,348	467,948	
Total Income from Charitable Activities	633,026	529,059	

4. Generated Funds

	2022 £	2021 £
Income from Fundraising Events	73	23
Generated Income	5,920	2,743
Total Generated Income	5,993	2,766

5. Investment Income

	2022 £	2021 £
Bank Interest	82	132

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2022

6. Staff Numbers and Costs

Staff Numbers	2022	2021
The average monthly numbers of employees during the year were as follows:-		
On Charitable Operations	17	17
On Administration	1	1
	2022	2021
	£	£
Staff Costs		
Salaries	399,274	324,946
Employers National Insurance	25,760	22,018
Employers Pension Contributions & other staff costs	10,640	9,922
	<u>405,675</u>	<u>356,886</u>

Pension Administration

The charity administers contributions by the staff to a workplace pension scheme. The charity contributes 3% of the annual salary of members of staff who have not opted out of the scheme and who contribute a minimum of 5% of salary

Number of staff in the scheme during the period - 17 (2021- 17)

There are no members of staff earning more than £60,000 per annum

7. Trustee Remuneration and Expenses

None of the Trustees received remuneration for their services.

	2022	2021
	£	£
Reimbursement of expenses relating to travel and attendance at Trustee Meetings	-	-
Number of Trustees reimbursed during the year - none (2021 - none)		

8. Support and Governance Costs

	2022	2021
	£	£
6.1 Support Costs		
Salary & Salary Costs	10,009	20,206
Premises & Office Costs	9,411	10,846
HR Services	5,450	5,737
	<u>34,830</u>	<u>36,679</u>

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2022

	2022	2021
	£	£
8.2 Governance Costs		
Salaries & Salary Costs	20,868	24,257
Premises & Office Costs	1,789	4,037
Legal & Professional	433	13
Audit Fee	1,620	1,620
Insurance	1,779	902
Bank Charges	92	82
Depreciation	3,551	4,489
	<u>30,127</u>	<u>35,380</u>

Support and Governance costs are allocated to projects in proportion to the staffing levels in each project.

9. Government Grants and Contracts

	2022	2021
	£	£
Details of the Grants Received and Service Contracts with Local Authorities are shown in Note 3 to the Accounts. The totals for the year under review are:-		
Grants from Local Government		
Contracts from Local Government	101,697	101,307

10. Taxation

The company is a registered charity and therefore is not liable for corporation tax on income derived from its charitable activities as it falls within the various exemptions available to registered charities.

11. Tangible Fixed Assets

	2022		2021	
	£	£	£	£
Cost				
	Office Furniture & Equipment	Office Machinery	Total	Total
At 1st April 2021	14,698	62,625	77,322	70,830
Additions		3,702	3,702	6,392
At 31st March 2022	<u>14,698</u>	<u>66,327</u>	<u>81,024</u>	<u>77,322</u>
Depreciation				
At 1st April 2021	14,698	58,088	70,785	68,298
Charge for the period		3,551	3,551	4,489
At 31st March 2022	<u>14,698</u>	<u>59,639</u>	<u>74,336</u>	<u>70,785</u>
Net Book Value at 31st March 2022		<u>6,688</u>	<u>6,688</u>	<u>6,537</u>

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2022

12. Debtors

	2022	2021
	£	£
Prepayments and accrued income	4,183	
Other Debtors	39,181	50,830
	<u>43,345</u>	<u>50,830</u>

13. Creditors

	2022	2021
	£	£
Amounts falling due within one year		
Accruals and deferred income	2,330	1,760
Trade Creditors	517	832
	<u>2,847</u>	<u>2,592</u>

14. Operating Lease Commitments

At 31st March 2022, the company had annual commitments under non-cancellable operating leases as follows:-

	2022	2021
	£	£
Buildings		
Expiry Date		
Within one year		
Between two and five years	18,833	12,000

15. Movement of Funds

15.1 Accumulated Funds

	Accumulated Funds Brought Forward	Income for the Period	Expenditure for the Period	Balances before Transfers	Inter Fund Transfers	Accumulated Funds Carried Forward
	£	£	£	£	£	£
Walsall Care Act		59,070	53,419	5,651	5,651	
CAF Resilience Grants		119,809	38,880	82,829		82,829
Crisis Advocacy	34,374			34,374		34,374
Moving on Project	42,303			42,303		42,303
Next Stop	(4,885)			(4,885)		(4,885)
Working with Learning Disabled Parents	4,856			4,856		4,856
Total - Restricted Funds	78,548	178,878	90,399	184,927	5,651	159,277

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2022

Physical Disability		42,827	22,812	19,815	(19,815)	
Birmingham Advocacy Hub		411,721	359,176	52,545	(52,545)	
General Fund	312,904	41,050	7,109	348,845	78,011	424,856

Total - Unrestricted Funds	312,904	495,388	389,095	419,205	5,651	424,856
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Total Accumulated Funds	389,552	674,077	479,495	584,133		584,133
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15.2 Analysis of Balances Carried Forward

	Net Fixed Assets	Debtors	Creditors	Prepaid Charges	Accrued Charges	Accrued Income	Bank & Cash	Balances Carried Forward
	£	£	£	£	£	£	£	£
Restricted Funds								
Walsall Care Act								
CAF Resilience Grants							82,629	82,629
Crisis Advocacy							34,374	34,374
Moving on Project							42,303	42,303
Next Stop							(4,885)	(4,885)
Working with Learning Disabled Parents							4,856	4,856
Total - Restricted Funds							159,277	159,277

Physical Disability								
Birmingham Advocacy Hub		39,181					(39,181)	
General Fund	6,668		517	4,213	2,330		425,229	424,856

Total Unrestricted Funds	6,668	39,181	517	4,213	2,330		396,047	424,856
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Balances Carried Forward	6,668	39,181	517	4,213	2,330		545,324	584,133
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ADVOCACY MATTERS LTD

England & Wales - Charity number 1148198

Accounts

ADVOCACY MATTERS LTD

A company limited by guarantee

Charity Number 1148198

Company Number 07987156

**Trustees' Report and Accounts
for the year ended 31st March 2021**

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Page 11	Statement of Financial Activities
Page 12	Balance Sheet
Pages 13-16	Notes to the Accounts

ADVOCACY MATTERS LTD

LEGAL AND ADMINISTRATION

Full Name: Advocacy Matters Ltd

Legal Status Company Limited by Guarantee

Charity Number: 1148198

Company Number: 07987156

Date of Incorporation: 12th March 2012

Governing Document: Memorandum and Articles of Association

Registered Address: 198 Boldmere Road
Boldmere
Sutton Coldfield
West Midlands
B73 5UE

Telephone Number: 0121 321 2377

Fax Number: 0121 321 2396

E-mail Address: info@advocacymatters.co.uk

Website www.advocacymatters.co.uk

Trustee Directors (Trustees) and Advisors

Trustees:	J Steckles	Chair
	C Chadwick	Treasurer
	G Law	
	A Parker	
	A Mott	Resigned 12 th February 2021
	R Netherway	
	P Shergold	Appointed 6 th May 2021

Chief Executive Officer E Keegan

Bankers Lloyds TSB
9 Birmingham Road
Sutton Coldfield
West Midlands
B72 1QA

Independent Examiner Jerroms
Suite 1, The Gardens
Coleshill Manor Office Campus
South Drive
Coleshill
B46 1DS

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2021

The trustees of Advocacy Matters Ltd present their report and the audited financial statements of the charity for the year ended 31st March 2021. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland, published 16th July 2014.

Legal Status of the Charity

The charity is a company Limited by Guarantee incorporated on 12th March 2012 and is governed by its Memorandum and Articles of Association. The company was formed specifically to take over the operations of Advocacy Matters, an unincorporated charity which has since been decommissioned. The company commenced operations on 1st October 2012 at which point any remaining assets or liabilities of the unincorporated charity were transferred to the company.

Members' Liability

The charity is a company limited by Guarantee. The trustees/directors named on page 1 are also the only members of the company. In the event of the company being wound up, their liability in respect of the guarantee is limited to £1 each.

Mission Statement

To provide Disabled People with an independent advocate to ensure individuals are heard and their rights, concerns and needs are acted upon.

Objects of the Charity

The objects of the charity as set out in its Articles of Association are:

1. To promote the relief of the physical and mental sickness of persons in need by reason of addiction, bereavement or loss, and to promote social inclusion for the public benefit by preventing people from becoming socially excluded, relieving the needs of those people who are socially excluded, assisting them to integrate into society with the object of improving their conditions of life by the provision of an advocacy service in the counties of the West Midlands, Warwickshire, Worcestershire, Staffordshire and Herefordshire or elsewhere in England and Wales, where need is identified, and additional support with the object of improving their conditions of life.

For the purpose of this clause, 'socially excluded' means being excluded from society or parts of society as a result of one or more of the following factors: unemployment; financial hardship; youth and old age; ill health, (physical or mental); substance abuse or dependency, including alcohol and drugs; discrimination on the grounds of sex, race, disability, ethnic origin, religion, belief, creed, sexual orientation, gender reassignment, poor education or skills attainment; relationship and family breakdown; poor housing (that is housing that does not meet basic habitable standards); crime (i.e. either as a victim of crime or as an offender rehabilitating into society).

2. To advance education, in particular training in advocacy skills and disability issues, throughout the UK.

In support of these objects, the charity will provide advocacy to all disabled people although the requirements of funders may restrict either the geographical area or type of disability for particular projects.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2021

Objects of the Charity (Continued)

When projects are first established, great care is taken to ensure that they are consistent with the aims and objectives of the charity and the trustees give careful consideration to the Charity Commission's general guidance on public benefit. Each case is also reviewed regularly by management in supervision with the advocate responsible to ensure that these requirements continue to be met.

The advocacy provided is completely independent and is not subject to the direction or approval of the funder. Funds available and advocates' time will also restrict the numbers to whom advocacy can be provided. Subject to these limits, the projects are for the benefit of all members of the disabled community irrespective of ethnicity, gender or sexuality and, except in unusual circumstances such as referrals by a solicitor, advocacy is provided without charge to the recipient. Applicants are dealt with on a first come, first served basis except where a crisis situation or other complex issues may require immediate action.

Each project is reviewed annually to ensure that it continues to reflect the charity objectives and has delivered benefits to the group of people the project was set up to help.

Structure, Governance and Management

The charity is governed by an Executive Committee comprising all the Trustees who are also Directors and the only members of the company. During the year under review, the day-to-day management of the charity was delegated to the Interim Chief Executive Officer, who assumed the role of Chief Executive Officer from 1st January 2021, with the assistance of three Operations Managers.

Where there is a requirement for a new trustee, candidates will normally be identified from recommendations by existing trustees or Operations Managers, particularly bearing in mind the skills and experience which such candidates would bring in areas which are beneficial to the charity but may not necessarily be represented by the existing trustees. Potential new trustees will usually be interviewed by the Chair and one of the Operations Managers who will explain the concept of advocacy and the aims and objectives of the charity. They are also informed of their legal obligations under charity and company law, the Charity Commission guidance on public benefit and are provided with leaflets from the Charity Commission so that they are aware of their roles and responsibilities before they decide to take on the role. Successful candidates are invited to attend the next trustees' meeting as observers and are provided with a copy of the Memorandum and Articles of Association.

New trustees are voted in by the Executive Committee and appointments are subject to Enhanced Disclosure and Barring Scheme checks. New trustees are provided with a trustee Induction Pack and Advocacy Training is available to ensure the new trustee is fully aware of the meaning of advocacy.

All members of the Executive Committee give their time voluntarily and do not receive any benefits from the charity. Note 7 to the accounts shows any expenses claimed by the Trustees during the period.

The Steering Group, which is incorporated into the My Side project, ensures that the charity remains "user led" and provides an important element of the charity's structure and governance.

Risk Management

The Trustees continually assess the risks to which the charity and its staff are exposed. This has been more relevant than ever because of the potential dangers of COVID 19. Where appropriate, systems, policies and procedures have been implemented to reduce these risks. They cover areas such as health and safety of staff, volunteers and visitors and lone working for staff and volunteers. These policies and procedures are regularly reviewed to ensure they are up to date and cover all areas involving the charity. All staff and volunteer appointments are subject to Enhanced Disclosure and Barring Scheme checks and full training is given to safeguard not only the safety of staff and volunteers but also the users for whom they may be advocating. A written risk assessment is carried out for every disabled person who is to be supported by a member of staff or volunteer and is held on file.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2021

Risk Management (Continued)

Risk Assessments relating to the office are carried out annually and Health and Safety is included on the Agenda of Staff Meetings.

Financial Risk is a major consideration for a small charity and liquid funds and reserves are regularly reviewed to ensure that there is sufficient working capital for the charity's needs. This includes the ability to finance the expenditure for those projects where payment for services is made in arrears.

Pay Policy

The Trustees consider the Chief Executive Officer and the three Operations Managers to be key management personnel but the pay policy for these key personnel is the same as for other staff. The pay of all staff is reviewed annually and will normally be increased in line with, or above, average earnings benchmarked against similar roles at other charities or the public sector, with a view to ensuring that they are paid at least as well as those benchmarks.

Achievements and Performance

The year under review has again been extremely challenging, particularly because of COVID 19 but, yet again, managers and staff have responded well to all the problems with which they have been faced. They have particularly been affected by not being able to carry out face to face meetings.

Advocates continue to raise Safeguarding issues on a number of the projects where there appears to be abuse of their disabled partners. Whilst these cases have resulted in the greater awareness of such problems and have also resulted in the improvement of safeguarding procedures and in the scrutiny of care providers, progress has been frustratingly slow. Incidents such as these, which can often lead to protracted investigations, emphasise the need for greater diligence and the importance of independent advocacy.

As a result of the independent advocacy provided by Advocacy Matters, care provision is often challenged, enabling individuals to be heard who might not otherwise have a voice.

Projects

The following is a brief review for the period of each of the major projects run by Advocacy Matters.

1. My Side

The trustees consider this type of project and particularly the training and employment of volunteers to be a fundamental part of the DNA of Advocacy Matters and have agreed to continue to fund the project from Unrestricted Funds but with vastly reduced numbers and mainly by trained Volunteers.

We have provided a range of different services on this project including one to one advocacy casework, group work, volunteer training, support, supervision, attendance at events and the continued promotion of our work. The project also facilitates user groups of vulnerable adults across Birmingham and Walsall. During the year support was given by 28 Volunteers covering this range of activities and Independent Advocacy support was given to 46 people.

One of the project's aims is to recruit and train volunteer advocates. This recruitment has continued and a number of carefully vetted and trained volunteer advocates are undertaking advocacy work with careful support and supervision.

Hear to Help

The Hear to Help project is a project within My Side set up specifically to provide a telephone, befriending and information support service by volunteers to respond to the issue of isolated people during the pandemic.

**ADVOCACY MATTERS LTD
TRUSTEES' REPORT**

For the year ended 31st March 2021

Achievements and Performance (Continued)

1. My Side (Continued)

There is still a clear demand for non-statutory advocacy work in Birmingham and we continue to be a much-needed service for support for vulnerable individuals who do not meet the eligibility for statutory advocacy. Even with this restricted capacity we have been able to provide independent advocacy for 38 users but this still leaves a huge number of vulnerable people in Birmingham for whom no independent advocacy is available.

The training element of this project has largely passed to the Volunteer Advocacy Training section of the Birmingham Advocacy Hub, see 4 below.

The Steering Group is an important part of this project and provides input into the charity's governance from all areas of Birmingham and Walsall. It functions to provide former and current advocacy partners with the opportunity to access peer advocacy as well as develop self advocacy skills. The purpose of the group is to address common barriers that prevent people accessing facilities in their local communities. Members are actively involved in such matters as the interviewing of all new staff, the provision of advice as to what accessible information should be provided by the charity, the design and content of the accessible information documentation produced and in contributing to the development of future projects for which the charity applies for funding.

2. Physical Disability Advocacy

This project is now being funded by Birmingham and Solihull Clinical Commissioning Group has again been extended. The project provides support for people who have experienced strokes or have other long-term, chronic conditions, including certain physical disabilities arising from spinal injuries, amputations, neurological conditions, traumatic brain injury etc.

During the year to 31st March 2021 support with Independent Advocacy was provided to 59 people and a range of development activities were carried out at Queen Elizabeth and Good Hope hospitals, GP surgeries, the Health Exchange and others.

3. Walsall Care Act Advocacy

The nature and scope of this project is the same as that of the Birmingham Care Act Advocacy project, see 4 below, albeit on a smaller scale. The arrangement is direct with Walsall Metropolitan Borough Council.

During the year under review, support was provided for 240 individuals.

4. Birmingham Advocacy Hub

Birmingham City Council issued a tender encompassing not only statutory advocacy but also a pre-defined amount of non-statutory advocacy and volunteer training. This project was awarded to POHWER, a national advocacy provider.

Advocacy Matters entered into a partnership agreement with POHWER to provide Advocacy Services on an agreed basis. This project commenced on 1st April 2019 and is of critical importance to Advocacy Matters. It incorporated the Care Act, IMCA, and a substantial part of the My Side projects which represented most of the charity's existing business. In addition other statutory advocacy and some non-statutory advocacy is also included.

A summary of each of the elements of the project is given below.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2021

Achievements and Performance (Continued)

4. Birmingham Advocacy Hub (Continued)

Care Act Advocacy

Care Act Advocacy is a form of statutory Advocacy governed by the Care Act 2014 whereby local authorities must arrange an independent advocate to facilitate the involvement of a person in their assessment, in the preparation of their care and support plan, in the review of their care plan, and in appropriate safeguarding procedures. This independent advocacy must be implemented to provide assistance if the following two conditions are met:-

- Where the potential recipient has substantial difficulty in being fully involved in these processes
- Where there is no one appropriate available to support and represent the person's wishes.

The role of the independent advocate is to support and represent the person and to facilitate their involvement in the key processes and interactions with the local authority. Acting as an advocate for a person who has substantial difficulty in engaging with care and support processes is a responsible position.

This work includes:-

- Assisting a person to understand the assessment, the care and support planning and the review processes. This requires advocates to understand local authority policies and processes, the available assessment tools, the planning options and the options available at the review of a care or support plan. It may involve advocates spending considerable time with the individual, considering their communications needs, their wishes and feelings and their life story, and using all this to assist the person to be involved and where possible to make decisions.
- Assisting a person to communicate their views, wishes and feelings to the staff who are carrying out an assessment or developing a care or support plan or reviewing an existing plan.
- Assisting a person to understand how their needs can be met by the local authority or otherwise – understanding, for example, how a plan can be personalised, how it can be tailored to meet specific needs, how it can be creative and inclusive and how it can be used to promote a person's rights to liberty and to family life.
- Assisting the person to make decisions about their care and support arrangements – assisting them to weigh up various care and support options and to choose the ones that best meet the person's needs and wishes.
- Assisting the person to understand their rights under the Care Act – for an assessment which considers their wishes and feelings and which considers the views of other people; their right to have their eligible needs met and to have a care or support plan that reflects their needs and their preferences. Also assisting the person to understand their wider rights, including their rights to liberty and family life. A person's rights are complemented by the local authority's duties, for example, to involve the person, to meet needs in a way that is least restrictive of a person's rights.
- Assisting a person to challenge a decision made by the local authority; and where a person cannot challenge the decision even with assistance, then to challenge it on their behalf.

Independent Mental Capacity Advocacy (IMCA)

The Mental Capacity Act came into force in April 2007 introducing statutory independent advocacy and imposing on the NHS and Local Authorities the duty to consult in defined situations concerning vulnerable individuals. IMCA requires the provision of non-instructed advocacy to individuals, aged 16 and over, who have been assessed to lack capacity for specific decisions and who have no family or friends who might otherwise advocate on their behalf.

**ADVOCACY MATTERS LTD
TRUSTEES' REPORT**

For the year ended 31st March 2021

Achievements and Performance (Continued)

4. Birmingham Advocacy Hub (Continued)

Independent Mental Capacity Advocacy (Continued)

This may include those with learning difficulties, dementia, mental health problems, acquired brain injury and cognitive impairments associated with serious physical illness.

IMCA is a very specialist form of advocacy and all advocates involved in this form of advocacy are required to undertake specialist training.

IMCA advocates will also be involved in any Safeguarding aspects related to Deprivation of Liberty (DoLs) under the Mental Capacity Act 2009.

Independent Mental Health Advocacy (IMHA)

IMHA is covered by Mental Health Act Revision 2007 and relates to inpatients held under a section of the Mental Health Act 1983.

Independent Complaints Advocacy Service (ICAS)

National Health Complaints are the statutory responsibility of the National Health Service but these are commissioned through Public Health England and the local authority.

Community Advocacy

Community Advocacy applies to all issues that vulnerable people face which fall outside the above legislation.

Volunteer Advocacy Training

One of the forms of advocacy which Birmingham City Council are keen to support is advocacy by volunteers which they are promoting by supporting the training of potential new advocates.

1471 referrals were dealt with during the period and, despite the restrictions arising out of the lockdown under COVID, 4 training courses were held providing volunteer training for 38 participants.

5. Hear Me Out

This was a small but important project commissioned by the Birmingham Children's Hospital Charity to provide advocacy for sick children in the Birmingham Children's Hospital and to give young people hospitalised in the Birmingham Children's Hospital a say in their future and assist them to move on to further education or on to adult life. In particular the problems encountered in moving on to university are extremely daunting.

There has again been very positive feedback, not only from the young people themselves but from hospital consultants and parents. Despite the popularity of the project with the users, it was decommissioned at the end of September 2020.

Other than Hear Me Out, the above projects were ongoing at the period end. Many have long waiting lists due to the current high demand for advocacy.

Income and Expenditure for the year for each of these projects and the balances at the year-end are shown in Note 15 to the Accounts.

ADVOCACY MATTERS LTD TRUSTEES' REPORT

For the year ended 31st March 2021

Financial Results

The results for the year are set out in the attached Financial Statements and Notes. The net movement in funds for the period amounted to a surplus of £159,618. The total retained reserves at 31st March 2021 amounted to £389,551.

Reserves

The trustees periodically review the reserves position of the charity in order to ascertain whether or not the funds that they are holding are adequate for its work. In doing this they take into consideration the financial risks to which the charity is subject, the assets and working capital requirements for continued service delivery and for unforeseen circumstances, particularly relating to uncertainties of future funding.

A further major consideration is the drastic change in the way that many projects are being funded. In many cases remuneration is on a per hour or per referral basis with payment in arrears with no guarantee of the number of referrals which will be required. This places all the risk on to the provider and could have a catastrophic effect on the charity's funds if things go wrong.

At 31 March 2021 the charity had reserves of £389,551 of which £312,903 were unrestricted. The trustees have reviewed whether unrestricted funds can be applied for public benefit whilst maintaining an appropriate level of free reserves. The trustees are of the opinion that free reserves (reserves available for working capital, development and provision of the service) should be at least six months costs of running the organisation which currently equates to £206,564. The trustees therefore consider that the free reserves are adequate.

Subsequent Events

A number of funding bids have been submitted, some of which have been successful and others which have not yet been awarded but look very hopeful.

Plans for Future Periods

The trustees will continue to seek new projects which are suitable and beneficial to the community of people with disabilities, which are consistent with the charity's aims and objectives and which deliver public benefit to all members of the community.

The reduction in funding from Local Authorities generally and the reluctance of other potential funders to fund non-statutory advocacy means that different approaches to fundraising are required if the charity is to remain sustainable with adequate levels of funding and this is now a priority which is being urgently addressed.

One of the Objects of the charity is to advance education, in particular by providing training in advocacy skills and disability issues. This training is now handled by the Volunteer Advocacy Training section of the Birmingham Advocacy Hub (see 4 above) and will continue to be a priority. A brief outline of the type of facilities which could be provided is available on the charity's website. This training will normally be provided to other advocacy organisations or health professionals to the ultimate public benefit of the disabled community as a whole.

The training of professionals in disability awareness under the Working with Learning Disabled Parents project, which took place some time ago, has shown the necessity of such training and the charity will continue to look for similar opportunities. In the meantime the provision of training for professionals working with learning disabled parents is taking place on an as and when required basis.

Statement of Trustees' Responsibilities

The trustees (who are also directors of Advocacy Matters Ltd for the purposes of company law) are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

**ADVOCACY MATTERS LTD
TRUSTEES' REPORT**

For the year ended 31st March 2021

Statement of Trustees' Responsibilities (Continued)

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 incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing the 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 (FRS102);
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed subject to any material departures disclosed and explained in the financial statements.
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that 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.

Insofar as the trustees are aware:

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

The strategic report under the Companies Act 2006 (Strategic Report and Directors' Report) Regulations 2013 is not required as the charity qualifies as a small charitable company.

Independent Examiner

Jerroms Business Solutions Limited have indicated their willingness to act as Independent Examiner to the charitable company and were duly re-appointed.

This report was approved by the Trustees on 13th December 2021 and signed on their behalf by:-



C. Chadwick
Director/Trustee

ADVOCACY MATTERS LTD

Independent Examiner's Report to the Board of Advocacy Matters Ltd

I report to the Board on my examination of the financial statements of Advocacy Matters Ltd (the charity) for the year ended 31st March 2021.

Responsibilities and basis of report

As the Board of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the financial statements of the charity 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 the charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

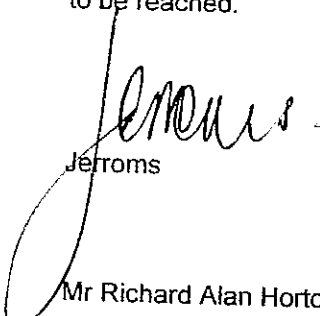
Independent Examiner's Statement

Since the charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of 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 that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act; or
2. the financial statements do not accord with those records; or
3. the financial statements 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 financial statements 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 financial statements to be reached.



Jerroms

Mr Richard Alan Horton

Chartered Certified Accountants

Suite 1, The Gardens
Coleshill Manor Office Campus
South Drive
Coleshill
B46 1DS

Dated: 14th December 2021

ADVOCACY MATTERS LTD
Statement of Financial Activities
for the year to 31st March 2021

	Notes	Restricted Funds £	Unrestricted Funds £	2021 £	2020 £
Income from :-					
Donations and Legacies	2		40,790	40,790	9,038
Generated Income	4		2,766	2,766	1,975
Income from Investments	5		132	132	136
Income from Charitable Activities	3	61,111	467,948	529,059	480,175
Total Income		<u>61,111</u>	<u>511,636</u>	<u>572,747</u>	<u>491,323</u>
Expenditure on:-					
Raising Funds			3,284	3,284	3,284
Charitable Activities		44,689	365,155	409,844	539,879
Total Expenditure		<u>44,689</u>	<u>368,439</u>	<u>413,128</u>	<u>543,163</u>
Net Income		16,422	143,197	159,619	(51,840)
Inter Fund Transfers	15	(16,422)	16,422		
Net Movement in Funds			159,619	159,619	(51,840)
Total Funds Brought Forward	15	76,648	153,284	229,932	281,772
Total Funds Carried Forward	15	<u>76,648</u>	<u>312,903</u>	<u>389,551</u>	<u>229,932</u>

All recognised gains and losses are included in these accounts.

The notes on Pages 13 to 16 form part of these accounts.

ADVOCACY MATTERS LTD
Balance Sheet as at 31 March 2021

	Notes	£	2021 £	£	2020 £
Fixed Assets					
Tangible fixed Assets	11		6,537		4,634
Current Assets					
Debtors	12	50,830		37,938	
Cash at Bank and in hand		334,776		190,391	
Total Current Assets		<u>385,606</u>		<u>228,330</u>	
Current Liabilities - amounts falling due within one year					
Creditors	13	2,592		3,032	
Total Current Liabilities -		<u>2,592</u>		<u>3,032</u>	
Net Current Assets			383,014		225,298
Total Assets less Liabilities			<u>389,551</u>		<u>229,932</u>
Represented by Funds carried forward					
Unrestricted Funds	15		312,903		153,284
Restricted Funds	15		76,648		76,648
Total of Accumulated Funds carried forward			<u>389,551</u>		<u>229,932</u>

These Financial Statements have been prepared in accordance with special provisions of Part 15 of the Companies Act 2006 relating to small companies and in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1st January 2015).

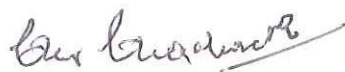
For the year ended 31 March 2021 the company was entitled to exemption under section 477 of the Companies Act 2006 relating to small companies.

No members have required the company to obtain an audit of its accounts for the year in question in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

Agreed by the Trustees on 13th December 2021
and signed on their behalf by:-



C Chadwick
Director/Trustee

The notes on Pages 13 to 16 form part of these Accounts.

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2021

1. Accounting Policies

Accounting Convention

The accounts are prepared on an historical cost basis and in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1st January 2015) and the Statement of Recommended Practice for Charities (SORP 102), the Charities Act 2011 and the Companies Act 2006. Advocacy Matters Ltd has taken advantage of the exemption in Financial Reporting Practice No. 1 from the requirement to produce a Cash Flow Statement on the grounds that it is a small charitable company.

Income

Incoming Resources include grants received from local government and other organisations and generated income which are accounted for on an accruals basis. Donations, gifts, donated services and other voluntary income are accounted for when received.

Expenditure

Resources expended are accounted for on an accruals basis. Costs relating to specific projects are allocated on a direct basis. Other costs are allocated on an estimated usage basis.

Tangible Fixed Assets

All Tangible Fixed Assets costing, or with an estimated cost of, at least £250 are valued at cost or a reasonable value on receipt and are depreciated on a straight-line basis over a period of three years.

2. Voluntary Income

	£	2021	£	2020
Donations				
Miscellaneous Advocacy			2,113	
Grants			3,169	
Legacy	40,290		747	
Other Income			2,009	
Total Voluntary Income	500		1,000	
		<u>40,790</u>		<u>9,038</u>

3. Incoming Resources from Charitable Activities

Restricted Income from Charitable Activities

Walsall Metropolitan Borough Council				
Walsall Care Act	58,611		58,157	
Birmingham Children's Hospital		58,611		58,157
Hear Me Out	2,500		12,500	
		2,500		12,500
Total Restricted Income from Charitable Activities		<u>61,111</u>		<u>70,657</u>

Unrestricted Income from Charitable Activities

Birmingham Advocacy Hub				
POHWER Contract	425,252		367,531	
Birmingham Adults and Communities		425,252		367,531
Independent Mental Capacity Advocacy				
VoiceAbility				
Care Act				
Cross Birmingham Clinical Commissioning Group				
Physical Disability Advocacy	42,696		41,987	
		42,696		41,987

Volunteers' Advocacy

Total Unrestricted Income from Charitable Activities

Total Income from Charitable Activities

<u>467,948</u>	<u>409,518</u>
<u>529,059</u>	<u>480,175</u>

4. Generated Funds

	2021	2020
	£	£
Income from Fundraising Events		
Generated Income	23	1,773
Total Generated Income	2,743	202
	<u>2,766</u>	<u>1,975</u>

5. Investment Income

Bank Interest

	2021	2020
	£	£
	<u>132</u>	<u>136</u>

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2021

6. Staff Numbers and Costs

Staff Numbers

The average monthly numbers of employees during the year were as follows:-

On Charitable Operations
On Administration

2021	2020
17	17
1	2

Staff Costs

Salaries
Employers National Insurance
Employers Pension Contributions & other staff costs

2021 £	2020 £
324,946	413,961
22,018	29,611
9,922	11,813
<u>356,886</u>	<u>455,385</u>

Pension Administration

The charity administers contributions by the staff to a workplace pension scheme. The charity contributes 3% of the annual salary of members of staff who have not opted out of the scheme and who contribute a minimum of 5% of salary

Number of staff in the scheme during the period - 18 (2020- 19)

There are no members of staff earning more than £60,000 per annum

7. Trustee Remuneration and Expenses

None of the Trustees received remuneration for their services.

Reimbursement of expenses relating to travel and attendance at Trustee Meetings
Number of Trustees reimbursed during the year - none (2020- none)

2021 £	2020 £
-	-

8. Support and Governance Costs

8.1 Support Costs

Salary & Salary Costs
Premises & Office Costs
HR Services

2021 £	2020 £
20,296	34,659
10,646	13,260
5,737	9,925
<u>36,679</u>	<u>57,845</u>

8.2 Governance Costs

Salaries & Salary Costs
Premises & Office Costs
Legal & Professional
Independent Examiner's Fee
Insurance
Annual General Meeting
Publicity
Bank Charges
Depreciation

2021 £	2020 £
24,257	53,202
4,037	9,794
13	1,245
1,620	1,500
902	938
	111
62	180
4,489	62
<u>35,380</u>	<u>2,316</u>
	<u>69,347</u>

Support and Governance costs are allocated to projects in proportion to the staffing levels in each project.

9. Government Grants and Contracts

Details of the Grants Received and Service Contracts with Local Authorities are shown in Note 3 to the Accounts. The totals for the year under review are:-
Grants from Local Government
Contracts from Local Government

2021 £	2020 £
101,307	100,144

10. Taxation

The company is a registered charity and therefore is not liable for corporation tax on income derived from its charitable activities as it falls within the various exemptions available to registered charities.

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2021

11. Tangible Fixed Assets

	£	£	2021 £	2020 £
Cost				
At 1st April 2020				
Additions				
At 31st March 2021				
Depreciation				
At 1st April 2020				
Charge for the period				
At 31st March 2021				
Net Book Value at 31st March 2021				

	£	£	2021 £	2020 £
Office Furniture & Equipment	14,698	56,233	70,930	70,930
Office Machinery		6,392	6,392	
	14,698	62,625	77,322	70,930
	14,698	51,599	66,296	63,980
		4,489	4,489	2,316
	14,698	56,088	70,785	66,296
		6,537	6,537	4,634

12. Debtors

Prepayments and accrued income
Other Debtors

	2021 £	2020 £
	50,830	37,938
	50,830	37,938

13. Creditors

Amounts falling due within one year
Accruals and deferred income
Trade Creditors

	2021 £	2020 £
	1,760	1,930
	832	1,102
	2,592	3,032

14. Operating Lease Commitments

At 31st March 2019, the company had annual commitments under non-cancellable operating leases as follows:-

Buildings
Expiry Date

Within one year
Between two and five years

	2021 £	2020 £
	12,000	13,000

15. Movement of Funds

15.1 Accumulated Funds

	Accumulated Funds Brought Forward £	Income for the Period £	Expenditure for the Period £	Balances before Transfers £	Inter Fund Transfers £	Accumulated Funds Carried Forward £
Restricted Funds						
Walsall Care Act		58,611	43,702	14,909	14,909	34,374
Hear me out		2,500	987	1,513	1,513	42,303
Crisis Advocacy	34,374			34,374		(4,885)
Moving on Project	42,303			42,303		4,856
Next Stop	(4,885)			(4,885)		
Working with Learning Disabled Parents	4,856			4,856		
Total - Restricted Funds	76,648	61,111	44,689	93,070	16,422	76,648
Unrestricted Funds						
Physical Disability		42,696	27,002	15,694	(15,694)	
Birmingham Advocacy Hub		425,252	341,437	83,815	(83,815)	
General Fund	153,284	43,688		196,972	115,931	312,903
Total - Unrestricted Funds	153,284	511,636	368,439	296,481	16,422	312,903
Total Accumulated Funds	229,932	572,747	413,128	389,551	0	389,551

ADVOCACY MATTERS LTD

Notes to the Accounts for the year ended 31st March 2021

15.2 Analysis of Balances Carried Forward

	Net Fixed Assets £	Debtors £	Creditors £	Prepaid Income £	Accrued Charges £	Accrued Income £	Bank & Cash £	Balances Carried Forward £
Restricted Funds								
Walsall Care Act		14,710						
Hear me out							(14,710)	
Crisis Advocacy								
Moving on Project							34,374	34,374
Next Stop							42,303	42,303
Working with Learning Disabled Parents							(4,885)	(4,885)
							4,856	4,856
Total - Restricted Funds		14,710					61,938	76,648
Unrestricted Funds								
Physical Disability		35,437					(35,437)	
Birmingham Advocacy Hub		683	832		1,760		308,275	312,903
General Fund	6,537							
Total Unrestricted Funds	6,537	36,120	832		1,760		272,838	312,903
Balances Carried Forward	6,537	50,830	832		1,760		334,776	389,551