



Trustees' Annual Report for the period

Period start date				Period end date		
From	01	04	2022	To	31	03 2023

Section A Reference and administration details

Charity name Carmarthenshire Carers Forum

Other names charity is known by

Registered charity number (if any) 1159710

Charity's principal address Little Deane

Llanwrda

Carmarthenshire

Postcode

SA19 8HD

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Michael Scordellis	Chairperson		
2	Sarah Jayne Isherwood	Treasurer		
3	Eva Millar	Trustee		
4	Gwenllian Duncombe	Trustee		
5	Colleen Deborah Chinnery	Social Secretary		
6	Carroll Emlyn Jones Nunnerley	Secretary		
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	CIO – Foundation Registered 22 Dec 2014
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Appointed by Trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

To support carers in Carmarthenshire in furtherance of their caring role. To help carers identify as such so that they can access services effectively. To ensure carers understand the various systems of support that are available and to help them make informed decisions regarding the available choices. To foster interaction, socialisation, empowerment and understanding.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

To promote the relief of carers in any manner, which now or hereafter may be deemed by law to be charitable in Carmarthenshire. The charity shall have the following powers exercisable in furtherance of its said object but not further or otherwise, namely: -

1. To provide and assist in the provision of information, advice and offer other assistance to carers.
2. To encourage and provide services for those requiring care which take account of the needs of carers and if thought fit to make reasonable charges for any services provided hereunder.
3. To raise public awareness, principally in the County of Carmarthenshire.
4. To communicate between carers, policy makers and other services supporting carers, enabling carers to have an effective voice and an informed representation in policy making and service development.
5. To encourage the exchange by carers, policy makers and other services of useful information and best practice in carers' issues and promote and encourage carers' groups and support schemes principally in Carmarthenshire.
6. To pursue any other charitable purpose.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

Please read Newsletter Spring 2023 attached below after the signature page.

Section E Financial review

Brief statement of the charity's policy on reserves

Keep reserves against the possibility of a reduction in funding.

Details of any funds materially in deficit

N/a

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

We have a contract with Carmarthenshire County Council for which we receive £5000.00

All income is spent on core objectives.

We pay Carers travel expenses and replacement care costs so that they can attend our meetings.

We maintain a Facebook group to share information and support Carers

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

M Scordellis

Full name(s)

Michael Scordellis (Jan 24, 2024, 5:16pm)
Mr Michael Scordellis

Position (eg Secretary, Chair, etc)

Chairperson

Date

09/01/2024

Carmarthenshire
Carers Forum



Fforwm Gofalwyr
Sir Gaerfyrddin

The Voice of Carers

Newsletter Spring 2023



Carmarthenshire Carers Forum,
Michael Scordellis Chairperson Tel: 07866 210119 mike_scordellis@yahoo.co.uk
Sarah Isherwood Treasurer Tel: 01550 777404 sarahisher@btinternet.com
Registered charity number 1159710 (England & Wales)



Announcement

The trustees of Carmarthenshire Carers Forum regret to inform you that due to ill health Mr Ken Jones will be standing down as Chair of Carmarthenshire Carers Forum with immediate effect. Sadly, this will be before the occasion of his 75th birthday at the end of 2023 as he had previously hoped.

We hope you will join with us to rejoice in the work Ken has done with and for Carers in Carmarthenshire and wish him well on his road to recovery. We would also like to send our best wishes to Paul Benson our previous Treasurer, unfortunately he has also had to step down too due to ongoing health issues.

In addition to our new Chair Michael Scordellis and existing trustees and board members Gwenllian Duncombe and Eva Millar we have recruited three new trustees. Myself Sarah Isherwood who will be presuming the role of Treasurer, Carroll Nunnerley as Secretary and our new Social Secretary Colleen Chinnery who will be the contact for our April event. For details and your invitation to the our County Wide Event please see point 3 of the newsletter.

We hope you can join us and together we can continue the incredible success of Carmarthenshire Carers Forum into the future.



INTRODUCTION

1. Welcome everyone to the Spring Issue of our newsletter.
2. The Trustees of Carmarthenshire Carers Forum (CCF) are delighted to report another good attendance at our latest Christmas County Wide Forum at Parc y Scarlet on 15th December (10.15 – 2.30) despite adverse weather conditions, and difficulty confirming with members about the event, the event went ahead and the number in attendance was 42. Michael Scordellis welcomed everyone, including, our highly regarded guest speaker Dr Phil Kloer, Executive Medical Director/Deputy Chief Executive of Hywel Dda University Health Board and he was very well received. We had a free raffle and a 3 course Lunch. Dr Phil Kloer gave an update on the Health Board proposal “Social model of health and well-being” He stayed for lunch, and made himself fully accessible to our members, answering their questions.
3. It gives us great pleasure to cordially invite you to our County Wide Forum and 3 course lunch next month on Thursday 27th April at Parc Y Scarlets from 10.30-2.30pm (Doors open at 10am). We hope as many of you as possible can attend. Please contact Colleen Chinnery Social Secretary to reserve your place and provide any dietary or accessibility requirements. Email: colleen.chinnery@hotmail.co.uk or Tel/Text 07832 997565. All seats need to be booked in advance.

Other items covered in this newsletter, Trustees Emergency Meetings, Moving Forward, Message from the Treasurer.

Trustees Emergency Meetings

There have been two recent emergency meetings to discuss the future of Carmarthenshire Carers Forum. New trustees and committee members have been appointed.

We are all in agreement that we wish to continue the good work of Carmarthenshire Forum as we feel this is a very much needed and much regarded friendship group.

Forward Planning

Our main objectives are:

- CCF should remain essentially a Friendship group focusing on the health and wellbeing of unpaid Carers
- We will continue to include some ex-carers and cared for at our events
- We should continue with our Reach and Impact policy. This involves reaching Unpaid and ex Carers and some cared for through our activities – listening to our members experience and problems – and making an impact by bringing concerns to the attention of those in authority. We will endeavour to be represented on several public bodies.



- We will continue to provide our current range of services, including locally based coffee mornings, buffet lunches, small local meetings and county wide Forums.
- We will be arranging local events for our members nearest to their home addresses in places such as Llanelli, Ammanford, Llandeilo, Llandovery, Pembrey, Carmarthen, Pontyberem, Cross Hands and St Clears.
- Our members from across Carmarthenshire will be invited to our County Forums where generally we have a guest speaker, free raffle, and a 2 or 3 course lunch at a high-quality venue. Trustees are of the view that we should limit County wide Forums to three or four per year and concentrate more on local events. This would be more cost effective and attract even greater numbers.
- We also hope to invite a number of special guests to join us to use the event to understand the perspective of unpaid Carers, ex Carers and some cared for who will be in attendance.
- We will continue to produce our popular newsletter
- Operating without a website will continue to be our policy. In the last two years, we have near tripled our memberships without a website, utilising our locally based reach policy in contacting unpaid Carers in different communities.
- Maintaining a presence on Facebook will continue.



- As an independent charity essentially run by unpaid Carers for Carers, we will continue to actively fundraise to fund our activities with some grateful help from Carmarthenshire County Council.
- For us at CCF we aim to provide a range of activities and events for our members to look forward to. We want to help enhance wellbeing and quality of life. Carers make the sacrifices they make, but our lives are for living not merely existing.
- We are currently looking for someone to help with funding applications and to help co-produce future newsletters. Please contact myself Sarah Isherwood or Michael Scordellis if you are interested in either a volunteer role or to register your interest in paid employment (if or when we can secure funding for this). Please find our contact details in the footnote.



A PERSONAL MESSAGE FROM THE TREASURER

As a carer myself I understand the importance and value of shared experience, myself and other trustees would like to continue to provide the opportunities to support each other and create valuable friendships at future Carmarthenshire Carers Forum Events.

As mentioned earlier, Ken Jones regrettably had to step down from his role as Chair, Michael Scordellis has courageously taken on the role of our new Chairperson.

We are so grateful to Ken for his relentless commitment to Carers in Carmarthenshire. He carried out these selfless duties whilst caring for his wife and undertaking several Welsh Government Ministerial appointments as well as being Chair of Carmarthenshire Health Board. Carmarthenshire Carer's Forum has gone from strength to strength and this would never have been achieved without Ken's dedication or the help of his daughter Debbie. We thank them both for their resolute hardwork and steadfastness.

We are also grateful to Michael Scordellis for his continuous commitment and our Previous Treasurer Paul Benson who too has recently stepped down due to ill health and we wish him well. We thank all our members for their patience and understanding, whilst myself and our new committee members find our feet. I'd like finish by echoing Ken's words "We'd love your help, to help us to take things forward".

Kindest Regards

Sarah Isherwood - Treasurer of Carmarthenshire Carers Forum.



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CHARITY COMMISSION
FOR ENGLAND AND WALES

Carmarthenshire Carers Forum

1159710

Receipts and payments accounts

CC16a

For the period
from

Period start date
01/04/2022

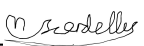
To

Period end date
31/03/2023

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Carmarthenshire County Council	10,840	-	-	10,840	10,000
Pembrokeshire Association	1,775	-	-	1,775	5,000
Donations	96	-	-	96	626
Covid 19 Support Fund	-	-	-	-	-
Local Giving	510	-	-	510	-
Other	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	13,221	-	-	13,221	15,626
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	13,221	-	-	13,221	15,626
A3 Payments					
General Fund	18,343	-	-	18,343	14,378
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	18,343	-	-	18,343	14,378
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	18,343	-	-	18,343	14,378
Net of receipts/(payments)	5,122	-	-	5,122	1,249
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	17,126	-	-	17,126	15,877
Cash funds this year end	12,004	-	-	12,004	17,126

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	HSBC Account	12,004	-	-
		-	-	-
		-	-	-
	Total cash funds	12,004	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value
			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value
	07/12/2020 HP Computer		700	420
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
			Mr Michael Scordellis Chairperson	09/01/2024
		Michael Scordellis (Jan 24, 2024, 5:16pm)		



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