



UmbrellaCymru

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Rhif Elusen Gofrestredig | Registered Charity Number | 1160909

Umbrella Cymru

Annual Report

2023-24



Objectives and Activities

Summary of the purposes of the charity as set out in its governing document.

The object of the CIO is:

- (1) To advance equality of opportunity for, foster good relations between, and eliminate discrimination experienced by, people who identify as/with a 'minority characteristic' in relation to the protected characteristics of "sexual orientation" and "gender reassignment" as described in the Equality Act (2010) by, in particular but not limited to:
 - (a) providing information, training and other support services as the trustees see fit, to anyone (either in a personal or professional capacity) who lives, works, or has connections within Wales.
 - (b) advancing public education and awareness of sexual orientation and gender identity equality.
 - (c) developing the capacity and skills of 'the community' insofar as their socially disadvantaged status, in such a way that they are better able to identify, and help meet, their needs and to participate more fully in society.
 - (d) performing or promoting other activities as the trustees see fit in pursuance of the CIO's purpose.

Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.

Umbrella Cymru continued to provide a range of support services in relation to gender and sexual identity, diversity, equality and inclusion.

The main activities of the organisation include the provision of support such as information and signposting, advocacy, practical and emotional support, listening and befriending and other services tailored to those requiring such support.

In addition to direct support provided to 'clients', support is also provided to 'professionals' through awareness raising and training input sessions. These

services support skills and knowledge development within a wider context, therefore indirectly supporting 'clients' simultaneously.

Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Trustees and staff are aware of the Charity Commission's guidance on public benefit. The purpose and objectives of the organisation satisfy both elements of 'public benefit' and activities and decisions are undertaken in line with guidance.

Trustees continually pay due regard to the guidance and its principles when considering any decisions that might have the potential to affect the impact on beneficiaries.

Achievements and Performance

Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.

Support is provided to people referred to the service or to those who have requested support directly. The service provides tailored support to individuals and families across Wales.

Financial Review

Review of the charity's financial position at the end of the period.

The accounts have been reviewed. The financial position is good at the end of the period.

Statement explaining the policy for holding reserves stating why they are held.

Reserves will be held to ensure the continued running of the service. This will allow for any increase in DRCs and provide a 'development pot' for unfunded expenses such as IT equipment that will improve the services offered.
Amount of reserves held.
£137,951
Reasons for holding zero reserves.
NA
Details of fund materially in deficit.
NA
Explanation of any uncertainties about the charity continuing as a going concern.
None.
Structure, Governance and Management
Description of charity's trusts:
The charity received restricted grant funding during this period to deliver support services to young people and adults.
Type of governing document
Constitution of CIO. Last amended 19-02-2018.
How is the charity constituted?

Charitable Incorporated Organisation
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees.
Trustees are selected in accordance with the constitution: Appointment of charity trustees (1) Apart from the first charity trustees, every appointed trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. (2) In selecting individuals for appointment as appointed charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.
Reference and Administrative details
Charity name
Umbrella Cymru
Other name the charity uses
NA
Registered charity number
1160909
Charity's principal address

Suite 15, Innovation and Technology Centre, Tredomen Business Park, Hengoed, Caerphilly, CF82 7FN.

Names of the charity trustees who manage the charity

1	Nicholas Lewis
2	Johanna Robinson
3	Heather Powell
4	Richard Miles-Thorne

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity

NA

Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects

NA

Details of arrangements for safe custody and segregation of such assets from the charity's own assets

NA

Declarations

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

Signed on behalf of the charity's trustees:

Signature(s)



Full Name(s)

Nick Lewis

Position

Trustee

Date

12-01-2025

[illegible]

St Davids House
Feeder Row
Cwmcar
Newport
NP11 7ED

Independent examiner's report to the trustees of Umbrella Cymru

I report to the trustees on my examination of the accounts of Umbrella Cymru (the Trust) for the year ended 5 April 2024

Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

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

Independent examiner's statement

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

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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

Signed:



Name: Miss Laura Dyrbus

Member of The Association of Accounting Technicians

Address: Beverley & Williams Accountants Ltd, Unit A, St David's House, Feeder Row, Cwmcar
Newport, NP11 7ED

Date: 5 September 2024