

PEOPLE FIRST BRIDGEND

England & Wales · Charity number 1166485

Details

Other names	PFB
Status	Registered
Legal form	CIO
Registered	2016-04-12
Register	View on the Charity Commission register

Contact

Address	People First Bridgend Office 32 Apollo Business Village Heol Persondy Aberkenfig Bridgend
Phone	01656668314
Email	info@peoplefirstbridgend.co.uk
Website	www.peoplefirstbridgend.co.uk

Activities

Objects: 1. TO RELIEVE AND SUPPORT PEOPLE WHO HAVE A LEARNING DISABILITY AND/OR WITH AUTISTIC SPECTRUM DISORDER (HEREAFTER KNOWN AS "PRIMARY BENEFICIARIES") IN THE COUNTY BOROUGH OF BRIDGEND AND ANY OTHER REGION WITH WHICH THE BOROUGH WORKS COLLABORATIVELY (HEREAFTER KNOWN AS "THE GEOGRAPHICAL AREA"), THROUGH SERVICES WHICH CAN ENABLE THEM TO OBTAIN THEIR FULL RIGHTS AND PRIVILEGES AS CITIZENS. 2. TO PROMOTE SOCIAL INCLUSION FOR THE PUBLIC BENEFIT BY PREVENTING PRIMARY BENEFICIARIES FROM BECOMING SOCIALLY EXCLUDED, RELIEVING THE NEEDS OF THOSE PRIMARY BENEFICIARIES WHO ARE SOCIALLY EXCLUDED AND ASSISTING THEM TO INTEGRATE INTO SOCIETY. 3. TO ADVANCE AND PROMOTE EDUCATION OF PRIMARY BENEFICIARIES THROUGH TRAINING WORKSHOPS AND OTHER OPPORTUNITIES FOR LEARNING. MOVING FORWARD/BPF POLICIES/GOVERNANCE/CONSTITUTION 17.03.154. TO ADVANCE THE EDUCATION OF THE GENERAL PUBLIC ABOUT THE EDUCATIONAL, PHYSICAL, EMOTIONAL AND PSYCHOLOGICAL NEEDS OF PRIMARY BENEFICIARIES.

Activities: People First Bridgend is the leading specialist, value-based, user-led organisation, committed to upholding the rights of people with learning disabilities and/or autistic spectrum disorder in the county of

Bridgend, to enable them to obtain their full rights and privileges as citizens. We champion the rights of people with learning disabilities and/or autism and enable them to have a voice.

Classification

- **How:** Provides Advocacy/advice/information, Other Charitable Activities
- **What:** General Charitable Purposes, Education/training, Disability, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** People With Disabilities, Other Defined Groups

Geography

- Bridgend

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£117,400	£114,136	-	-
2024-03-31	£116,500	£101,635	-	-
2023-03-31	£106,055	£99,829	-	-
2022-03-31	£106,055	£99,829	-	-
2021-03-31	£102,134	£101,260	-	-

Trustees

Name	Role	Appointed
JEAN GREGSON	Chair	2016-04-12
Alun Phillips		2019-01-09
David Steven Roberts		2024-07-11
Heather Williams		2016-04-12
Janet Rees		2024-09-12
Michael John Harris		2021-01-21
Ritchie Wood		2024-04-25

PEOPLE FIRST BRIDGEND

England & Wales - Charity number 1166485

Accounts

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025
FOR
PEOPLE FIRST BRIDGEND**

Xeinadin South Wales and West Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

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FOR THE YEAR ENDED 31 MARCH 2025**

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

The trustees present their report with the financial statements of the charity for the year ended 31 March 2025. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

OBJECTIVES AND ACTIVITIES

Activities

People First Bridgend advocates for adults with learning disabilities and neurodiversity living in Bridgend County, Wales.

We support these people to:

- Speak-up about important issues affecting their lives,
- Have a voice in decisions about their care and support,
- Teach others about what it means to have learning disabilities and neurodiversity.

We do this through several core activities, including:

- Self-Advocacy groups
- Independent Professional Advocacy
- Easy Read
- Awareness Training
- Steering Groups/Away Days
- Consultation work

People First Bridgend does this work under two local authority contracts:

1) Statutory Independent Professional Advocacy:

Advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for people entering or accessing social services provided by Bridgend County Borough Council. Clients typically need advocacy to have an equal voice or alleviate a conflict of interest when they are subject to social services functions.

2) Non-statutory Advocacy (previously Peer-support and Skills for Independence)

Advocacy not constrained to those using statutory services. This includes several different types of activities:

- Independent advocacy for those not in receipt of or awaiting assessment for social services,
- Advisory Team self-advocacy group for adults with learning disabilities,
- Bridgend Spectrum Support Group for adults with autism who benefit from peer-support,
- Training for professionals and public around learning disability and autism,
- Accessible information translation,
- Participation and representation of learning disability and disability in a range of networks, forums, steering groups and workstreams at a local and national level.

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

ACHIEVEMENTS AND PERFORMANCE

Independent Professional Advocacy (IPA)

We continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for adults with learning disabilities and/or autism accessing health and social services provided by Bridgend County Borough Council, or who live in Bridgend County. We also provided independent advocacy for non-statutory issues.

IPA makes sure people with care and support needs:

- Have a voice in what care and support they get,
- Have an equal relationship with their care provider,
- Have someone who is working in their interests only,
- Can understand what is going on or have help to understand if they can't,
- Can put their views and wishes across or have help to if they can't.

During the reporting period, our IPA service achieved the following:

- Took 49 New Referrals (27 statutory IPA referrals, 22 non-statutory IPA referrals)
- Worked with 66 clients (35 statutory IPA referrals, 31 non-statutory IPA referrals)
- Worked on 118 statutory advocacy issues and 90 non-statutory issues
- Worked on 42 preventive service-related issues
- Closed 31 clients
- Made 8 signposting referrals to other organisations

Advisory Team Self-Advocacy Group (A-Team)

Our A-Team is made up of adults with learning disabilities from around Bridgend County. They use their self-advocacy voices to speak up about important issues on behalf of Bridgend's learning disability community. They do this for local, regional and national issues.

Stats:

- 16 Unique Members
- 19 Meetings Held
- 6 New Enquiries
- 1 New member

From April - September we introduced a new workshop - Self-Advocacy Skills Workshop, a workshop specifically for practicing self-advocacy skills. We ran this once a month, as well as the Advisory Team once a month. This group was not very well attended so we returned to having two advisory team meetings a month. In January however, no advisory team meetings were held due to other self-advocacy commitments.

We facilitated sessions around several topical issues for our members to give self-advocacy input, including:

- Swansea UHB Reducing Restrictive Practices and Positive Behavioural Support Training
- Filming 'Hear Our Voices' - a film about why it is important to include our voices in the social work course at Swansea University
- Developing teaching content for Swansea University Learning Disability Awareness training
- Experienced Voices Meetings with Swansea University
- Cwm Taf Morgannwg UHB consultation on PROMS and PREMS animation video
- Consultation and filming with Llais, regarding our experiences of health and social care services.
- Assisted Transport Policy consultation for BCBC.

Additionally, we supported our members to attend the following meetings:

- All Wales People First's National Council Meeting
- All Wales People First's Advocacy Festival (AdFest)
- Focus Group with BCBC's Social Services Director
- Regional Partnership Board's Community Workstream, including a Chair role
- BCBC's Better Together Bridgend (formally, the Service Development Plan), including a Chair role
- Learning Disability Ministerial Advisory Group (LDMAG)

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

- Regional Accommodation Strategy Launch Event

Bridgend Spectrum Support Group (BSSG)

The BSSG is a peer-support group for adults with higher-functioning autism. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice.

Stats:

- 53 Unique Members
- 35 Meetings Held

Accessible Information

We translate information into Easy Read. We produced the following:

- Regional Partnership Board's Community Workstream minutes
- Regional Partnership Board's Chair Role Description
- Regional Partnership Board's Member Role Description
- BCBC's Better Together Bridgend invites, agendas and minutes

Training

We ran Learning Disability Awareness and Communication Training for:

- BAVO's Community Navigators and Local Community Coordinators
- Swansea University's Social Work students
- Llais Wales
- South Wales Police.

We also participated in South Wales Police Specialist Witness Training Course - members watched a short clip of a crime and were then interviewed by Police.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

FINANCIAL REVIEW

Financial position

Income

Over the financial year, People First Bridgend secured the following income from its advocacy contracts with Bridgend County Borough Council:

+ Statutory Independent Professional Advocacy: £32,400

+ Non-Statutory Advocacy: £81,600

We received earned income from:

+ Swansea University : Total - £2,000.

£1,000 in May 2024 and £1,000 in March 2025

And

+ Learning Disability Wales : £250 in April 2024

+ All Wales people First: £250 in Jan 2025

We received a donation from:

+ South Wales Police: £900 in March 2025

Expenditure

People First Bridgend's expenditure on its advocacy contracts is as follows:

- Statutory Independent Professional Advocacy: £30,021

- Non-Statutory Advocacy: £85,765

We underspent on our Statutory Independent Professional Advocacy contract. We started the financial year with just one Independent Professional Advocate in post. However, we recruited a second Independent Professional Advocate who commenced employment in June 2024.

We overspent on our Non-Statutory Advocacy Contract. Our additional and big expenditures included Better Together Bridgend venue costs, and Advocacy QPM costs.

We plan to continue repurposing the underspend from this financial year and the previous in ways which benefit the advocacy services.

Our expenditure on the ARC grant funding was used on - Coach hire for the BSSG: £320.00

We used our Reserves for the following:

- £705.00 on venue hire (Masonic Hall) for a celebration event.

- £171.99 on music entertainment for the above event.

Principal funding sources

People First Bridgend's primary source of income is through two contracts with Bridgend County Borough Council:

1. Specialist Statutory Independent Professional Advocacy for people with learning disabilities and autism
2. Specialist Non-Statutory Advocacy for people with learning disabilities and autism

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

FINANCIAL REVIEW

Reserves policy

People First Bridgend has a risk management policy which supports the Board to assess and manage the charity's exposure to risks, such as the loss of core funding. It also has a reserves policy that supports the Board to calculate how much reserves are needed to maintain the charity, should it be exposed to these risks.

The charity's policies state that reserves are funds held which are not subject to commitments, planned expenditure or other restrictions. It aims to keep a minimum of 3-months operating costs in reserves to allow for the Board to deal with:

- loss of core funding,
- maintaining staff salaries whilst attempting to secure additional funding,
- sourcing alternative services or activities for service users,
- meeting redundancy costs,
- unplanned but essential expenditure,
- covering operating costs whilst awaiting receipt of committed funding.

The charity will match reserves to these requirements and no more.

Amount of reserves held - £50,047

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The Charity is controlled by its governing document, a constitution, and constitutes a Charitable Incorporated Organisation (CIO) as defined by the Charities Act 2011.

Recruitment and appointment of new trustees

Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are recruited in line with Section 9 and 10 of the constitution:

- Are over 18 years old,
- Have appropriate skills, knowledge and experience to administrate the charity,
- Are invited to attend a meeting,
- Are approved by the trustees at an executive meeting.

When being inducted on the Board, trustees receive:

- a copy of the charity's constitution,
- a meeting with the Operational Manager to introduce the work of the charity,
- a copy of the charity's latest annual accounts,
- copies of policies and procedures,
- copies of the standards which the charity works to, including the Advocacy QPM Code of Practice and the Charity Governance Code for small charities.

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

As a foundation CIO, the Board are solely responsible for People First Bridgend. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries.

In addition to the Board, People First Bridgend has an Advisory Team made up of 16 adults with learning disabilities. Whilst the Advisory Team have no say on the governance of the charity, they steer the direction of its activities through their bi-monthly self-advocacy group meetings.

The Board delegates the practical work of the charity to a staff team of five. The Self-Advocacy Facilitator left post December 2024. Since then, the Advocacy Coordinator took on the Facilitator's duties. The most senior staff member is the Operational Manager who provides the day-to-day leadership and management of the charity.

People First Bridgend is part of the wider People First self-advocacy movement, with which it maintains networking links. Particularly All Wales People First, who advocate for people with learning disabilities at a Welsh Government level. However, all People First groups are independent and are not affiliated with a higher organisation.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

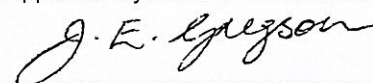
Trustees

Jean Gregson
Heather Williams
Alun Phillips
Michael John Harris
Ritchie Wood
Dave Roberts
Jan Rees

Independent Examiner

Xeinadin South Wales & West
Court House
Court Road
Bridgend
CF31 1BE

Approved by order of the board of trustees on 12/12/2025 and signed on its behalf by:



Jean Gregson - Trustee

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
PEOPLE FIRST BRIDGEND**

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2025.

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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.



J Payne ACA

Xeinadin South Wales and West Limited
Court House
Court Road
Bridgend
CF31 1BE

Date: 12/12/2025.....

PEOPLE FIRST BRIDGEND

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2025

		Unrestricted fund £	Restricted fund £	2025 Total funds £	2024 Total funds £
	Notes				
INCOME AND ENDOWMENTS FROM					
Donations and legacies		900	-	900	1,000
Charitable activities	2				
Supporting people with learning disability		2,500	114,000	116,500	115,500
Total		<u>3,400</u>	<u>114,000</u>	<u>117,400</u>	<u>116,500</u>
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		-	118,655	118,655	101,635
NET INCOME/(EXPENDITURE)		3,400	(4,655)	(1,255)	14,865
RECONCILIATION OF FUNDS					
Total funds brought forward		15,123	36,179	51,302	36,437
TOTAL FUNDS CARRIED FORWARD		<u>18,523</u>	<u>31,524</u>	<u>50,047</u>	<u>51,302</u>

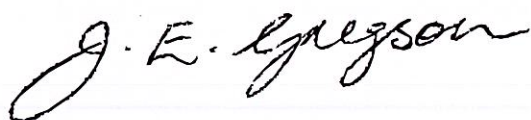
The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

BALANCE SHEET
31 MARCH 2025

	Notes	Unrestricted fund £	Restricted fund £	2025 Total funds £	2024 Total funds £
FIXED ASSETS					
Tangible assets	8	-	2,000	2,000	2,664
CURRENT ASSETS					
Debtors	9	-	342	342	316
Cash at bank		18,523	33,823	52,346	56,186
		18,523	34,165	52,688	56,502
CREDITORS					
Amounts falling due within one year	10	-	(4,641)	(4,641)	(7,864)
NET CURRENT ASSETS		18,523	29,524	48,047	48,638
TOTAL ASSETS LESS CURRENT LIABILITIES		18,523	31,524	50,047	51,302
NET ASSETS		18,523	31,524	50,047	51,302
FUNDS	11				
Unrestricted funds				18,523	15,123
Restricted funds				31,524	36,179
TOTAL FUNDS				50,047	51,302

The financial statements were approved by the Board of Trustees and authorised for issue on 12/12/2025..... and were signed on its behalf by:



.....
Jean Gregson - Trustee

The notes form part of these financial statements

**NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025**

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2025

2. INCOME FROM CHARITABLE ACTIVITIES

The breakdown of grant income received during the year is as follows:

	£
BCBC NSA Grant	81,600
BCBC SIPA Contract	32,400
	<u>114,000</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>114,136</u>	<u>4,519</u>	<u>118,655</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2025 nor for the year ended 31 March 2024.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2025 nor for the year ended 31 March 2024.

5. STAFF COSTS

	2025 £	2024 £
Wages and salaries	90,029	65,051
Other pension costs	<u>1,617</u>	<u>1,251</u>
	<u>91,646</u>	<u>66,302</u>

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

	2025	2024
Direct Charitable Activities	<u>6</u>	<u>4</u>

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

The total amount paid to key management personnel in the financial year was £34,747.

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2025

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	1,000	-	1,000
Charitable activities			
Supporting people with learning disability	-	115,500	115,500
Total	<u>1,000</u>	<u>115,500</u>	<u>116,500</u>
EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	-	101,635	101,635
NET INCOME	1,000	13,865	14,865
RECONCILIATION OF FUNDS			
Total funds brought forward	14,123	22,314	36,437
TOTAL FUNDS CARRIED FORWARD	<u>15,123</u>	<u>36,179</u>	<u>51,302</u>

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £2,040

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2024 and 31 March 2025	<u>1,405</u>	<u>33,690</u>	<u>35,095</u>
DEPRECIATION			
At 1 April 2024	1,405	31,026	32,431
Charge for year	-	664	664
At 31 March 2025	<u>1,405</u>	<u>31,690</u>	<u>33,095</u>
NET BOOK VALUE			
At 31 March 2025	<u>-</u>	<u>2,000</u>	<u>2,000</u>
At 31 March 2024	<u>-</u>	<u>2,664</u>	<u>2,664</u>

PEOPLE FIRST BRIDGEND

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2025

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2025	2024
	£	£
Prepayments and accrued income	342	316

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2025	2024
	£	£
Other creditors	4,641	7,864

11. MOVEMENT IN FUNDS

	At 1.4.24	Net movement in funds	At 31.3.25
	£	£	£
Unrestricted funds			
General fund	15,123	3,400	18,523
Restricted funds			
Advocacy	36,179	(4,655)	31,524
TOTAL FUNDS	<u>51,302</u>	<u>(1,255)</u>	<u>50,047</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
Unrestricted funds			
General fund	3,400	-	3,400
Restricted funds			
Advocacy	114,000	(118,655)	(4,655)
TOTAL FUNDS	<u>117,400</u>	<u>(118,655)</u>	<u>(1,255)</u>

11. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1.4.23 £	Net movement in funds £	At 31.3.24 £
Unrestricted funds			
General fund	14,123	1,000	15,123
Restricted funds			
Advocacy	22,314	13,865	36,179
TOTAL FUNDS	<u>36,437</u>	<u>14,865</u>	<u>51,302</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	1,000	-	1,000
Restricted funds			
Advocacy	115,500	(101,635)	13,865
TOTAL FUNDS	<u>116,500</u>	<u>(101,635)</u>	<u>14,865</u>

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

	At 1.4.23 £	Net movement in funds £	At 31.3.25 £
Unrestricted funds			
General fund	14,123	4,400	18,523
Restricted funds			
Advocacy	22,314	9,210	31,524
TOTAL FUNDS	<u>36,437</u>	<u>13,610</u>	<u>50,047</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2025

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	4,400	-	4,400
Restricted funds			
Advocacy	229,500	(220,290)	9,210
TOTAL FUNDS	<u>233,900</u>	<u>(220,290)</u>	<u>13,610</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2025.

PEOPLE FIRST BRIDGEND

England & Wales - Charity number 1166485

Accounts

Trustee's Annual Report

Charity Name: People First Bridgend
CIO Number: 1166485
Period Start/End: 1st April 2023 – 31st March 2024



1. Objectives and Activities

Summary of the purposes of the charity as set out in its governing document.	SORP Reference: Para 1.17
People First Bridgend's charity objectives are: 1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens. 2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society. 3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning. 4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.	
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.	SORP Reference: Para 1.17, 1.19
Main Activities People First Bridgend advocates for adults with learning disabilities and neurodiversity living in Bridgend County, Wales. We support these people to: • Speak-up about important issues affecting their lives, • Have a voice in decisions about their care and support, Be equal, active citizens in their community, • Teach others about what it means to have learning disabilities and neurodiversity.	

We do this through several core activities, including:

- Self-Advocacy groups
- Independent Professional Advocacy
- Easy Read
- Awareness Training
- Steering Groups / Away Days
- Consultation work

People First Bridgend does this work under two local authority contracts:

1) Statutory Independent Professional Advocacy:

Advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for people entering or accessing social services provided by Bridgend County Borough Council. Clients typically need advocacy to have an equal voice or alleviate a conflict of interest when they are subject to social services functions.

2) Non-Statutory Advocacy (previously Peer-support and Skills for Independence)

Advocacy not constrained to those using statutory services. This includes several different types of activities:

- Independent advocacy for those not in receipt of or awaiting assessment for social services,
- Advisory Team self-advocacy group for adults with learning disabilities,
- Bridgend Spectrum Support Group for neurodiverse adults who benefit from peer-support,
- Training for professionals and public around learning disability and neurodiversity issues,
- Accessible information translation,
- Participation and representation of learning disability and neurodiversity in a range of networks, forums, steering groups and workstreams at a local and national level.

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

SORP Reference:
Para 1.18

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

2. 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.	SORP Reference: Para 1.20
Independent Professional Advocacy (IPA) We continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014 and for non-statutory issues. This is independent advocacy for adults with learning disabilities or autism accessing health and social services provided by Bridgend County Borough Council, or who live in Bridgend County. IPA makes sure people with care and support needs: • Have a voice in what care and support they get, • Have an equal relationship with their care provider, • Have someone who is working in their interests only, • Can understand what is going on or have help to understand if they can't, • Can put their views and wishes across or have help to if they can't. During the reporting period, our IPA service achieved the following: • Took 31 New Referrals • Worked with 32 clients • Worked on 123 statutory advocacy issues • Worked on 27 preventive service related issues • Closed 17 clients • Made 17 signposting referrals to other organisations Advisory Team Self-Advocacy Group (A-Team) Our A-Team is made up of adults with learning disabilities from around Bridgend County. They use their self-advocacy voices to speak up about important issues on behalf of Bridgend's learning disability community. They do this for local, regional and national issues. Stats: - 21 Unique Members - 22 Meetings Held - 55 New Enquiries The A-Team consistently met bi-monthly in-person. We facilitated sessions around several topical issues for our members to give self-advocacy input, including: • Meet and greet with our local MP, Chris Elmore • Meet and greets with our local MS', Huw Iranca Davies and Sarah Murphy	

- Meeting BCBC's health team to discuss roles
- Consultation with Learning Disability Wales' Gig Buddies project
- Meetings with Swansea University to explore lived experience training
- Developing a jargon roleplay for BCBC's service development plan
- Linking in with the Regional Partnership Board, exploring membership and chairing roles

Additionally, we supported our members to attend the following meetings:

- All Wales People First's National Council Meeting
- All Wales People First's Advocacy Festival (AdFest)
- Focus Group with BCBC's Social Services Director
- Regional Partnership Board's Community Workstream, including a Chair role
- Regional Partnership Board's Driving Change Forward event, including facilitating and chairing it
- BCBC's Away Day for learning disability services

Two of our members now have a chairing role for the following groups:

- BCBC's Better Together Bridgend (formally, the Service Development Plan)
- Regional Partnership Board's Community Workstream

Bridgend Spectrum Support Group (BSSG)

The BSSG is a peer-support group for adults higher-functioning autism. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice.

This year, the group continued to co-deliver Art Therapy Sessions with the National Autistic Society. They were able to obtain grant funding from ARC to do several away days, including to St. Fagan's and Big Pit, and gained membership onto the Regional Neurodiversity Steering Group.

Stats:

- 57 Unique Members
- 28 Meetings Held

Accessible Information

We translate information into Easy Read. We produced the following:

- Regional Partnership Board's Community Workstream minutes
- Regional Partnership Board's Driving Change Forward agenda and invite

- BCBC's Feedback and Complaints policy
- BCBC's Engagement and Participation Strategy
- BCBC's Strategic Equality Plan
- Public Services Board's Well-being Plan
- BCBC's Better Together Bridgend invite, agenda and minutes

Stats:

- 14 Requests Received
- 182 Pages Produced
- 15 Documents Completed

Training

We ran "What is Advocacy? What is People First?" sessions for:

- BAVO's Community Navigators
- Swansea University's Social Work students
- BCBC's Supported Living services
- Regional Partnership Board's Health workstream

We ran Learning Disability Awareness Training for Swansea University and South Wales Police and took part in a mock Registered Intermediary session with the police.

Stats:

- 8 Requests Received
- 4 Sessions Delivered
- 20 Attendees

Additional Activities:

- We interviewed tenants of a BCBC commissioned supported living home for adults with complex needs. From these interviews we created two "Pen Portraits" of the tenants to be used during re-commissioning of the placement.
- We undertook 100 interviews with adults accessing Daytime Opportunities services. This was turned into a report for BCBC as part of their Learning Disability Transformation Programme to overhaul day services.

3. Financial Review

Review of the charity's financial position at the end of the period.	SORP Reference: Para 1.21
Income	

Over the financial year, People First Bridgend secured the following income from its advocacy contracts with Bridgend County Borough Council:

+ Statutory Independent Professional Advocacy: £32,400

+ Non-Statutory Advocacy: £81,600

We received grant restricted funding from ARC:

+ BSSG Socialisation Funding: £1,500

And a donation from:

+ Swansea University: £1,000

Expenditure

People First Bridgend's expenditure on its advocacy contracts is as follows:

- Statutory Independent Professional Advocacy: £26,982

- Non-Statutory Advocacy: £73,432

We were once again underspent in both contracts. As in the previous year, we faced challenges in recruiting new staff, which is the main reason for our underspend. We recruited an Advocacy Coordinator and an Independent Professional Advocate in Q2, but one post remained vacant at the year end.

With agreement from BCBC, we were able to repurpose our underspend to take on different activities outside of our business-as-usual. These activities included the Pen Portraits and Daytime Opportunities interviewing requested by BCBC, which we hired expert consultants to carry out.

We plan to continue repurposing the underspend from this financial year and the previous in ways which benefit the advocacy services.

Our expenditure on the ARC grant funding is as follows:

- BSSG Socialisation Funding: £923

This was used in-line with our funding agreement to do away-days with our Bridgend Spectrum Social Group. We did not spend the full grant but planned additional away-days for the following year.

We did not use any of our reserves this financial year.

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

SORP Reference:
Para 1.22

People First Bridgend has a risk management policy which supports the Board to assess and manage the charity's exposure to risks, such as the loss core funding. It also has a reserves policy that supports the Board to calculate how much reserves are needed to maintain the charity, should it be exposed to these risks.

The charity's policies state that reserves are funds held which are not subject to commitments, planned expenditure or other restrictions. It aims to keep a minimum of 3-months operating costs in reserves to allow for the Board to deal with:

1. loss of core funding,
2. maintaining staff salaries whilst attempting to secure additional funding,
3. sourcing alternative services or activities for service users,
4. meeting redundancy costs,
5. unplanned but essential expenditure,
6. covering operating costs whilst awaiting receipt of committed funding.

The charity will match reserves to these requirements and no more.

Amount of reserves held.	SORP Reference: Para 1.22
£15,123	
Reasons for holding zero reserves.	SORP Reference: Para 1.22
N/A	
Details of fund materially in deficit.	SORP Reference: Para 1.24
N/A	
Explanation of any uncertainties about the charity continuing as a going concern.	SORP Reference: Para 1.23
The charity's principal sources of funds (including any fundraising)	SORP Reference: Para 1.47
People First Bridgend's primary source of income is through two contracts with Bridgend County Borough Council: 1. Specialist Statutory Independent Professional Advocacy for people with learning disabilities and autism 2. Specialist Non-Statutory Advocacy for people with learning disabilities and autism	
A description of the principal risks facing the charity.	SORP Reference: Para 1.46

See explanation of uncertainties.

Structure, Governance and Management

Type of governing document.	SORP Reference: Para 1.25
Constitution	
How is the charity constituted?	SORP Reference: Para 1.25
Foundation model Charitable Incorporated Organisation (or CIO)	
Trustee selection methods including details of any constitutional provisions.	SORP Reference: Para 1.25
Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees. Trustees are recruited in line with Section 9 and 10 of the constitution: • Are over 18 years old, • have appropriate skills, knowledge and experience to administrate the charity, • are invited to attend a meeting, • are approved by the trustees at a board meeting.	
Policies and procedures adopted for the induction and training of trustees.	SORP Reference: Para 1.51
When being inducted on the Board, trustees receive: • a copy of the charity's constitution, • a meeting with the Operational Manager to introduce the work of the charity, • a copy of the charity's latest annual accounts, • copies of policies and procedures, • copies of the standards which the charity works to, including the Advocacy QPM Code of Practice and the Charity Governance Code for small charities. People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include: • Trustee Code of Conduct	

- Values Statement
- Conflict of Interests Policy
- Training and Development Policy

The charity's organisational structure and any wider network with which the charity works.

SORP Reference:
Para 1.51

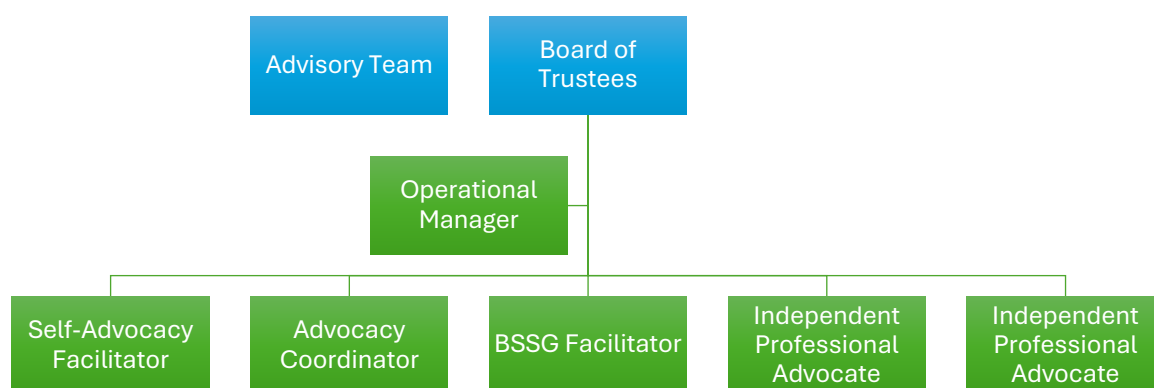
As a foundation CIO, the Board are solely responsible for People First Bridgend. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries.

In addition to the Board, People First Bridgend has an Advisory Team made up of 14 adults with learning disabilities. Whilst the Advisory Team have no say on the governance of the charity, they steer the direction of its activities through their bi-monthly self-advocacy group meetings.

The Board delegates the practical work of the charity to a staff team of five. The most senior staff member is the Operational Manager who provides the day-to-day leadership and management of the charity.

People First Bridgend is part of the wider People First self-advocacy movement, with which it maintains networking links. Particularly All Wales People First, who advocate for people with learning disabilities at a Welsh Government level. However, all People First groups are independent and are not affiliated with a higher organisation.

People First Bridgend Structure



Reference and Administrative details

Charity Name:	People First Bridgend
Other name the charity uses:	Bridgend People First (formerly)
Registered charity number:	1166485
Charity's principal address:	People First Bridgend Office 32 Apollo Business Village Heol Persondy Aberkenfig Bridgend CF32 9RF

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)
Jean Gregson	Chair		Board of Trustees
Heather Williams	Trustee		Board of Trustees
Alun Phillips	Trustee		Board of Trustees
Mike Harris	Trustee		Board of Trustees
Ritchie Wood	Trustee	Appointed 25/04/2025	Board of Trustees
Dave Roberts	Trustee	Appointed 11/07/2025	Board of Trustees
Jan Rees	Trustee		Board of Trustees
Name of CEO/most senior staff:		Adam Kurowski Wakeford – Operational Manager	

Other information:

- No corporate trustees/directors.
- No trustees hold title to property belonging to the charity.
- No funds held as custodian trustees on behalf of others.
- No advisors.
- No exemptions from disclosure.

Declarations

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

Signed on behalf of the charity's trustees:

Signature:	
Full names:	Jean Gregson
Position:	Chair of the Board of Trustees
Date:	23/01/2025

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2024
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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Statement of Financial Activities	9
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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

The trustees present their report with the financial statements of the charity for the year ended 31 March 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

OBJECTIVES AND ACTIVITIES

Activities

People First Bridgend advocates for adults with learning disabilities and neurodiversity living in Bridgend County, Wales.

We support these people to:

- Speak-up about important issues affecting their lives,
- Have a voice in decisions about their care and support,
- Be equal, active citizens in their community,
- Teach others about what it means to have learning disabilities and neurodiversity.

We do this through several core activities, including:

- Self-Advocacy groups
- Independent Professional Advocacy
- Easy Read
- Awareness Training
- Steering Groups/Away Days
- Consultation work

People First Bridgend does this work under two local authority contracts:

1) Statutory Independent Professional Advocacy:

Advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for people entering or accessing social services provided by Bridgend County Borough Council. Clients typically need advocacy to have an equal voice or alleviate a conflict of interest when they are subject to social services functions.

2) Non-statutory Advocacy (previously Peer-support and Skills for Independence)

Advocacy not constrained to those using statutory services. This includes several different types of activities:

- Independent advocacy for those not in receipt of or awaiting assessment for social services,
- Advisory Team self-advocacy group for adults with learning disabilities,
- Bridgend Spectrum Support Group for neurodiverse adults who benefit from peer-support,
- Training for professionals and public around learning disability and neurodiversity issues,
- Accessible information translation,
- Participation and representation of learning disability and neurodiversity in a range of networks, forums, steering groups and workstreams at a local and national level.

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

ACHIEVEMENT AND PERFORMANCE

Independent Professional Advocacy (IPA)

We continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014 and for non-statutory issues. This is independent advocacy for adults with learning disabilities or autism accessing health and social services provided by Bridgend County Borough Council, or who live in Bridgend County.

IPA makes sure people with care and support needs:

- Have a voice in what care and support they get,
- Have an equal relationship with their care provider,
- Have someone who is working in their interests only,
- Can understand what is going on or have help to understand if they can't,
- Can put their views and wishes across or have help to if they can't.

During the reporting period, our IPA service achieved the following:

- Took **31** New Referrals
- Worked with **32** clients
- Worked on **123** statutory advocacy issues
- Worked on **27** preventive service related issues
- Closed **17** clients
- Made **17** signposting referrals to other organisations

Advisory Team Self-Advocacy Group (A-Team)

Our A-Team is made up of adults with learning disabilities from around Bridgend County. They use their self-advocacy voices to speak up about important issues on behalf of Bridgend's learning disability community. They do this for local, regional and national issues.

Stats:

- 21 Unique Members
- 22 Meetings Held
- 55 New Enquiries

The A-Team consistently met bi-monthly in-person. We facilitated sessions around several topical issues for our members to give self-advocacy input, including:

- Meet and greet with our local MP, Chris Elmore
- Meet and greets with our local MS', Huw Iranca Davies and Sarah Murphy
- Meeting BCBC's health team to discuss roles
- Consultation with Learning Disability Wales' Gig Buddies project
- Meetings with Swansea University to explore lived experience training
- Developing a jargon roleplay for BCBC's service development plan
- Linking in with the Regional Partnership Board, exploring membership and chairing roles

Additionally, we supported our members to attend the following meetings:

- All Wales People First's National Council Meeting
- All Wales People First's Advocacy Festival (AdFest)
- Focus Group with BCBC's Social Services Director
- Regional Partnership Board's Community Workstream, including a Chair role
- Regional Partnership Board's Driving Change Forward event, including facilitating and chairing it
- BCBC's Away Day for learning disability services

Two of our members now have a chairing role for the following groups:

- BCBC's Better Together Bridgend (formally, the Service Development Plan)
- Regional Partnership Board's Community Workstream

Bridgend Spectrum Support Group (BSSG)

The BSSG is a peer-support group for adults with higher-functioning autism. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice.

This year, the group continued to co-deliver Art Therapy Sessions with the National Autistic Society. They were able to obtain grant funding from ARC to do several away days, including to St. Fagan's and Big Pit, and gained membership onto the Regional Neurodiversity Steering Group.

Stats:

- 57 Unique Members
- 28 Meetings Held

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We translate information into Easy Read. We produced the following:

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- Regional Partnership Board's Driving Change Forward agenda and invite
- BCBC's Feedback and Complaints policy
- BCBC's Engagement and Participation Strategy
- BCBC's Strategic Equality Plan
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- BCBC's Better Together Bridgend invite, agenda and minutes

Stats:

- 14 Requests Received
- 182 Pages Produced
- 15 Documents Completed

Training

We ran "What is Advocacy? What is People First?" sessions for:

- BAVO's Community Navigators
- Swansea University's Social Work students
- BCBC's Supported Living services
- Regional Partnership Board's Health workstream

We ran Learning Disability Awareness Training for Swansea University and South Wales Police and took part in a mock Registered Intermediary session with the police.

Stats:

- 8 Requests Received
- 4 Sessions Delivered
- 20 Attendees

Additional Activities:

- We interviewed tenants of a BCBC commissioned supported living home for adults with complex needs. From these interviews we created two "Pen Portraits" of the tenants to be used during re-commissioning of the placement.
- We undertook 100 interviews with adults accessing Daytime Opportunities services. This was turned into a report for BCBC as part of their Learning Disability Transformation Programme to overhaul day services.

REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2024

FINANCIAL REVIEW

Financial position

Income

Over the financial year, People First Bridgend secured the following income from its advocacy contracts with Bridgend County Borough Council:

+ **Statutory Independent Professional Advocacy:** £32,400

+ **Non-Statutory Advocacy:** £81,600

We received grant restricted funding from ARC:

+ **BSSG Socialisation Funding:** £1,500

And a donation from:

+ **Swansea University:** £1,000

Expenditure

People First Bridgend's expenditure on its advocacy contracts is as follows:

- **Statutory Independent Professional Advocacy:** £26,982

- **Non-Statutory Advocacy:** £73,432

We were once again underspent in both contracts. As in the previous year, we faced challenges in recruiting new staff, which is the main reason for our underspend. We recruited an Advocacy Coordinator and an Independent Professional Advocate in Q2, but one post remained vacant at the year end.

With agreement from BCBC, we were able to repurpose our underspend to take on different activities outside of our business-as-usual. These activities included the Pen Portraits and Daytime Opportunities interviewing requested by BCBC, which we hired expert consultants to carry out.

We plan to continue repurposing the underspend from this financial year and the previous in ways which benefit the advocacy services.

Our expenditure on the ARC grant funding is as follows:

- **BSSG Socialisation Funding:** £923

This was used in-line with our funding agreement to do away-days with our Bridgend Spectrum Social Group. We did not spend the full grant but planned additional away-days for the following year.

We did not use any of our reserves this financial year.

Reserves policy

People First Bridgend has a risk management policy which supports the Board to assess and manage the charity's exposure to risks, such as the loss core funding. It also has a reserves policy that supports the Board to calculate how much reserves are needed to maintain the charity, should it be exposed to these risks.

The charity's policies state that reserves are funds held which are not subject to commitments, planned expenditure or other restrictions. It aims to keep a minimum of 3-months operating costs in reserves to allow for the Board to deal with:

- loss of core funding,
- maintaining staff salaries whilst attempting to secure additional funding,
- sourcing alternative services or activities for service users,
- meeting redundancy costs,
- unplanned but essential expenditure,
- covering operating costs whilst awaiting receipt of committed funding.

The charity will match reserves to these requirements and no more.

FINANCIAL REVIEW

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The Charity is controlled by its governing document, a constitution, and constitutes a Charitable Incorporated Organisation (CIO) as defined by the Charities Act 2011.

Recruitment and appointment of new trustees

Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are recruited in line with Section 9 and 10 of the constitution:

- Are over 18 years old,
- Have appropriate skills, knowledge and experience to administrate the charity,
- Are invited to attend a meeting,
- Are approved by the trustees at an executive meeting.

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy
- Supplementary guidance (Charity Commission, Governance Code, Advocacy QPM)

Organisational structure

As a foundation CIO, the Board are solely responsible for People First Bridgend. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries.

In addition to the Board, People First Bridgend has an Advisory Team made up of 14 adults with learning disabilities. Whilst the Advisory Team have no say on the governance of the charity, they steer the direction of its activities through their bi-monthly self-advocacy group meetings.

The Board delegates the practical work of the charity to a staff team of five. The most senior staff member is the Operational Manager who provides the day-to-day leadership and management of the charity.

People First Bridgend is part of the wider People First self-advocacy movement, with which it maintains networking links. Particularly All Wales People First, who advocate for people with learning disabilities at a Welsh Government level. However, all People First groups are independent and are not affiliated with a higher organisation.

PEOPLE FIRST BRIDGEND

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2024**

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Jean Gregson
Heather Williams
Alun Phillips
Michael John Harris
Ritchie Wood
Dave Roberts
Jan Rees

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Approved by order of the board of trustees on 16/01/2025..... and signed on its behalf by:



.....
Jean Gregson - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Date:

PEOPLE FIRST BRIDGEND

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2024**

	Notes	Unrestricted fund £	Restricted fund £	31.3.24 Total funds £	31.3.23 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		1,000	-	1,000	1,850
Charitable activities	2				
Supporting people with learning disability		-	115,500	115,500	76,000
Total		1,000	115,500	116,500	77,850
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		-	101,635	101,635	69,127
NET INCOME		1,000	13,865	14,865	8,723
RECONCILIATION OF FUNDS					
Total funds brought forward		14,123	22,314	36,437	27,714
TOTAL FUNDS CARRIED FORWARD		15,123	36,179	51,302	36,437

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

**BALANCE SHEET
31 MARCH 2024**

	Notes	Unrestricted fund £	Restricted fund £	31.3.24 Total funds £	31.3.23 Total funds £
FIXED ASSETS					
Tangible assets	8	-	2,664	2,664	3,547
CURRENT ASSETS					
Debtors	9	-	316	316	303
Cash at bank		15,123	41,063	56,186	35,241
		<u>15,123</u>	<u>41,379</u>	<u>56,502</u>	<u>35,544</u>
CREDITORS					
Amounts falling due within one year	10	-	(7,864)	(7,864)	(2,654)
NET CURRENT ASSETS		<u>15,123</u>	<u>33,515</u>	<u>48,638</u>	<u>32,890</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>15,123</u>	<u>36,179</u>	<u>51,302</u>	<u>36,437</u>
NET ASSETS		<u>15,123</u>	<u>36,179</u>	<u>51,302</u>	<u>36,437</u>
FUNDS	11				
Unrestricted funds				15,123	14,123
Restricted funds				<u>36,179</u>	<u>22,314</u>
TOTAL FUNDS				<u>51,302</u>	<u>36,437</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 16/01/2025..... and were signed on its behalf by:



.....
Jean Gregson - Trustee

The notes form part of these financial statements

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2024

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

2. INCOME FROM CHARITABLE ACTIVITIES

The breakdown of grant income received during the year is as follows:

	£
BCBC NSA Grant	81,600
BCBC SIPA Contract	32,400
BCBC ARC	1,500
	<u>115,500</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>96,671</u>	<u>4,964</u>	<u>101,635</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2024 nor for the year ended 31 March 2023.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2024 nor for the year ended 31 March 2023.

5. STAFF COSTS

	31.3.24 £	31.3.23 £
Wages and salaries	65,051	46,519
Other pension costs	1,251	891
	<u>66,302</u>	<u>47,410</u>

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

	31.3.24	31.3.23
Direct Charitable Activities	<u>4</u>	<u>3</u>

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

The total amount paid to key management personnel in the financial year was £33,605.

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	1,850	-	1,850
Charitable activities			
Supporting people with learning disability	-	76,000	76,000
Total	<u>1,850</u>	<u>76,000</u>	<u>77,850</u>
EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	-	69,127	69,127
NET INCOME	1,850	6,873	8,723
RECONCILIATION OF FUNDS			
Total funds brought forward	12,273	15,441	27,714
TOTAL FUNDS CARRIED FORWARD	<u>14,123</u>	<u>22,314</u>	<u>36,437</u>

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £2,044.

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2023 and 31 March 2024	1,405	33,690	35,095
DEPRECIATION			
At 1 April 2023	1,405	30,143	31,548
Charge for year	-	883	883
At 31 March 2024	1,405	31,026	32,431
NET BOOK VALUE			
At 31 March 2024	-	2,664	2,664
At 31 March 2023	-	3,547	3,547

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.3.24	31.3.23
	£	£
Prepayments and accrued income	316	303
	<u> </u>	<u> </u>

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.3.24	31.3.23
	£	£
Other creditors	7,864	2,654
	<u> </u>	<u> </u>

11. MOVEMENT IN FUNDS

	At 1.4.23	Net movement in funds	At 31.3.24
	£	£	£
Unrestricted funds			
General fund	14,123	1,000	15,123
Restricted funds			
Advocacy	22,314	13,865	36,179
	<u> </u>	<u> </u>	<u> </u>
TOTAL FUNDS	<u>36,437</u>	<u>14,865</u>	<u>51,302</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
Unrestricted funds			
General fund	1,000	-	1,000
Restricted funds			
Advocacy	115,500	(101,635)	13,865
	<u> </u>	<u> </u>	<u> </u>
TOTAL FUNDS	<u>116,500</u>	<u>(101,635)</u>	<u>14,865</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

11. MOVEMENT IN FUNDS - continued**Comparatives for movement in funds**

	At 1.4.22 £	Net movement in funds £	At 31.3.23 £
Unrestricted funds			
General fund	12,273	1,850	14,123
Restricted funds			
Advocacy	15,441	6,873	22,314
TOTAL FUNDS	<u>27,714</u>	<u>8,723</u>	<u>36,437</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	1,850	-	1,850
Restricted funds			
Advocacy	76,000	(69,127)	6,873
TOTAL FUNDS	<u>77,850</u>	<u>(69,127)</u>	<u>8,723</u>

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

	At 1.4.22 £	Net movement in funds £	At 31.3.24 £
Unrestricted funds			
General fund	12,273	2,850	15,123
Restricted funds			
Advocacy	15,441	20,738	36,179
TOTAL FUNDS	<u>27,714</u>	<u>23,588</u>	<u>51,302</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	2,850	-	2,850
Restricted funds			
Advocacy	191,500	(170,762)	20,738
TOTAL FUNDS	<u>194,350</u>	<u>(170,762)</u>	<u>23,588</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2024.

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2024
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

The trustees present their report with the financial statements of the charity for the year ended 31 March 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

OBJECTIVES AND ACTIVITIES

Activities

People First Bridgend advocates for adults with learning disabilities and neurodiversity living in Bridgend County, Wales.

We support these people to:

- Speak-up about important issues affecting their lives,
- Have a voice in decisions about their care and support,
- Be equal, active citizens in their community,
- Teach others about what it means to have learning disabilities and neurodiversity.

We do this through several core activities, including:

- Self-Advocacy groups
- Independent Professional Advocacy
- Easy Read
- Awareness Training
- Steering Groups/Away Days
- Consultation work

People First Bridgend does this work under two local authority contracts:

1) Statutory Independent Professional Advocacy:

Advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for people entering or accessing social services provided by Bridgend County Borough Council. Clients typically need advocacy to have an equal voice or alleviate a conflict of interest when they are subject to social services functions.

2) Non-statutory Advocacy (previously Peer-support and Skills for Independence)

Advocacy not constrained to those using statutory services. This includes several different types of activities:

- Independent advocacy for those not in receipt of or awaiting assessment for social services,
- Advisory Team self-advocacy group for adults with learning disabilities,
- Bridgend Spectrum Support Group for neurodiverse adults who benefit from peer-support,
- Training for professionals and public around learning disability and neurodiversity issues,
- Accessible information translation,
- Participation and representation of learning disability and neurodiversity in a range of networks, forums, steering groups and workstreams at a local and national level.

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

ACHIEVEMENT AND PERFORMANCE

Independent Professional Advocacy (IPA)

We continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014 and for non-statutory issues. This is independent advocacy for adults with learning disabilities or autism accessing health and social services provided by Bridgend County Borough Council, or who live in Bridgend County.

IPA makes sure people with care and support needs:

- Have a voice in what care and support they get,
- Have an equal relationship with their care provider,
- Have someone who is working in their interests only,
- Can understand what is going on or have help to understand if they can't,
- Can put their views and wishes across or have help to if they can't.

During the reporting period, our IPA service achieved the following:

- Took **31** New Referrals
- Worked with **32** clients
- Worked on **123** statutory advocacy issues
- Worked on **27** preventive service related issues
- Closed **17** clients
- Made **17** signposting referrals to other organisations

Advisory Team Self-Advocacy Group (A-Team)

Our A-Team is made up of adults with learning disabilities from around Bridgend County. They use their self-advocacy voices to speak up about important issues on behalf of Bridgend's learning disability community. They do this for local, regional and national issues.

Stats:

- 21 Unique Members
- 22 Meetings Held
- 55 New Enquiries

The A-Team consistently met bi-monthly in-person. We facilitated sessions around several topical issues for our members to give self-advocacy input, including:

- Meet and greet with our local MP, Chris Elmore
- Meet and greets with our local MS', Huw Iranca Davies and Sarah Murphy
- Meeting BCBC's health team to discuss roles
- Consultation with Learning Disability Wales' Gig Buddies project
- Meetings with Swansea University to explore lived experience training
- Developing a jargon roleplay for BCBC's service development plan
- Linking in with the Regional Partnership Board, exploring membership and chairing roles

Additionally, we supported our members to attend the following meetings:

- All Wales People First's National Council Meeting
- All Wales People First's Advocacy Festival (AdFest)
- Focus Group with BCBC's Social Services Director
- Regional Partnership Board's Community Workstream, including a Chair role
- Regional Partnership Board's Driving Change Forward event, including facilitating and chairing it
- BCBC's Away Day for learning disability services

Two of our members now have a chairing role for the following groups:

- BCBC's Better Together Bridgend (formally, the Service Development Plan)
- Regional Partnership Board's Community Workstream

Bridgend Spectrum Support Group (BSSG)

The BSSG is a peer-support group for adults with higher-functioning autism. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice.

This year, the group continued to co-deliver Art Therapy Sessions with the National Autistic Society. They were able to obtain grant funding from ARC to do several away days, including to St. Fagan's and Big Pit, and gained membership onto the Regional Neurodiversity Steering Group.

Stats:

- 57 Unique Members
- 28 Meetings Held

Accessible Information

We translate information into Easy Read. We produced the following:

- Regional Partnership Board's Community Workstream minutes
- Regional Partnership Board's Driving Change Forward agenda and invite
- BCBC's Feedback and Complaints policy
- BCBC's Engagement and Participation Strategy
- BCBC's Strategic Equality Plan
- Public Services Board's Well-being Plan
- BCBC's Better Together Bridgend invite, agenda and minutes

Stats:

- 14 Requests Received
- 182 Pages Produced
- 15 Documents Completed

Training

We ran "What is Advocacy? What is People First?" sessions for:

- BAVO's Community Navigators
- Swansea University's Social Work students
- BCBC's Supported Living services
- Regional Partnership Board's Health workstream

We ran Learning Disability Awareness Training for Swansea University and South Wales Police and took part in a mock Registered Intermediary session with the police.

Stats:

- 8 Requests Received
- 4 Sessions Delivered
- 20 Attendees

Additional Activities:

- We interviewed tenants of a BCBC commissioned supported living home for adults with complex needs. From these interviews we created two "Pen Portraits" of the tenants to be used during re-commissioning of the placement.
- We undertook 100 interviews with adults accessing Daytime Opportunities services. This was turned into a report for BCBC as part of their Learning Disability Transformation Programme to overhaul day services.

FINANCIAL REVIEW

Financial position

Income

Over the financial year, People First Bridgend secured the following income from its advocacy contracts with Bridgend County Borough Council:

+ Statutory Independent Professional Advocacy: £32,400

+ Non-Statutory Advocacy: £81,600

We received grant restricted funding from ARC:

+ BSSG Socialisation Funding: £1,500

And a donation from:

+ Swansea University: £1,000

Expenditure

People First Bridgend's expenditure on its advocacy contracts is as follows:

- Statutory Independent Professional Advocacy: £26,982

- Non-Statutory Advocacy: £73,432

We were once again underspent in both contracts. As in the previous year, we faced challenges in recruiting new staff, which is the main reason for our underspend. We recruited an Advocacy Coordinator and an Independent Professional Advocate in Q2, but one post remained vacant at the year end.

With agreement from BCBC, we were able to repurpose our underspend to take on different activities outside of our business-as-usual. These activities included the Pen Portraits and Daytime Opportunities interviewing requested by BCBC, which we hired expert consultants to carry out.

We plan to continue repurposing the underspend from this financial year and the previous in ways which benefit the advocacy services.

Our expenditure on the ARC grant funding is as follows:

- BSSG Socialisation Funding: £923

This was used in-line with our funding agreement to do away-days with our Bridgend Spectrum Social Group. We did not spend the full grant but planned additional away-days for the following year.

We did not use any of our reserves this financial year.

Reserves policy

People First Bridgend has a risk management policy which supports the Board to assess and manage the charity's exposure to risks, such as the loss core funding. It also has a reserves policy that supports the Board to calculate how much reserves are needed to maintain the charity, should it be exposed to these risks.

The charity's policies state that reserves are funds held which are not subject to commitments, planned expenditure or other restrictions. It aims to keep a minimum of 3-months operating costs in reserves to allow for the Board to deal with:

- loss of core funding,
- maintaining staff salaries whilst attempting to secure additional funding,
- sourcing alternative services or activities for service users,
- meeting redundancy costs,
- unplanned but essential expenditure,
- covering operating costs whilst awaiting receipt of committed funding.

The charity will match reserves to these requirements and no more.

FINANCIAL REVIEW

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The Charity is controlled by its governing document, a constitution, and constitutes a Charitable Incorporated Organisation (CIO) as defined by the Charities Act 2011.

Recruitment and appointment of new trustees

Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are recruited in line with Section 9 and 10 of the constitution:

- Are over 18 years old,
- Have appropriate skills, knowledge and experience to administrate the charity,
- Are invited to attend a meeting,
- Are approved by the trustees at an executive meeting.

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy
- Supplementary guidance (Charity Commission, Governance Code, Advocacy QPM)

Organisational structure

As a foundation CIO, the Board are solely responsible for People First Bridgend. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries.

In addition to the Board, People First Bridgend has an Advisory Team made up of 14 adults with learning disabilities. Whilst the Advisory Team have no say on the governance of the charity, they steer the direction of its activities through their bi-monthly self-advocacy group meetings.

The Board delegates the practical work of the charity to a staff team of five. The most senior staff member is the Operational Manager who provides the day-to-day leadership and management of the charity.

People First Bridgend is part of the wider People First self-advocacy movement, with which it maintains networking links. Particularly All Wales People First, who advocate for people with learning disabilities at a Welsh Government level. However, all People First groups are independent and are not affiliated with a higher organisation.

PEOPLE FIRST BRIDGEND

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2024**

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Jean Gregson
Heather Williams
Alun Phillips
Michael John Harris
Ritchie Wood
Dave Roberts
Jan Rees

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Approved by order of the board of trustees on 16/01/2025..... and signed on its behalf by:



.....
Jean Gregson - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Date:

PEOPLE FIRST BRIDGEND

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2024**

	Notes	Unrestricted fund £	Restricted fund £	31.3.24 Total funds £	31.3.23 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		1,000	-	1,000	1,850
Charitable activities	2				
Supporting people with learning disability		-	115,500	115,500	76,000
Total		1,000	115,500	116,500	77,850
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		-	101,635	101,635	69,127
NET INCOME		1,000	13,865	14,865	8,723
RECONCILIATION OF FUNDS					
Total funds brought forward		14,123	22,314	36,437	27,714
TOTAL FUNDS CARRIED FORWARD		15,123	36,179	51,302	36,437

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

**BALANCE SHEET
31 MARCH 2024**

	Notes	Unrestricted fund £	Restricted fund £	31.3.24 Total funds £	31.3.23 Total funds £
FIXED ASSETS					
Tangible assets	8	-	2,664	2,664	3,547
CURRENT ASSETS					
Debtors	9	-	316	316	303
Cash at bank		15,123	41,063	56,186	35,241
		<u>15,123</u>	<u>41,379</u>	<u>56,502</u>	<u>35,544</u>
CREDITORS					
Amounts falling due within one year	10	-	(7,864)	(7,864)	(2,654)
NET CURRENT ASSETS		<u>15,123</u>	<u>33,515</u>	<u>48,638</u>	<u>32,890</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>15,123</u>	<u>36,179</u>	<u>51,302</u>	<u>36,437</u>
NET ASSETS		<u>15,123</u>	<u>36,179</u>	<u>51,302</u>	<u>36,437</u>
FUNDS	11				
Unrestricted funds				15,123	14,123
Restricted funds				<u>36,179</u>	<u>22,314</u>
TOTAL FUNDS				<u>51,302</u>	<u>36,437</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 16/01/2025..... and were signed on its behalf by:



.....
Jean Gregson - Trustee

The notes form part of these financial statements

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2024

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

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

Tangible fixed assets

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Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

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The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

2. INCOME FROM CHARITABLE ACTIVITIES

The breakdown of grant income received during the year is as follows:

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BCBC SIPA Contract	32,400
BCBC ARC	1,500
	<u>115,500</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>96,671</u>	<u>4,964</u>	<u>101,635</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2024 nor for the year ended 31 March 2023.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2024 nor for the year ended 31 March 2023.

5. STAFF COSTS

	31.3.24 £	31.3.23 £
Wages and salaries	65,051	46,519
Other pension costs	1,251	891
	<u>66,302</u>	<u>47,410</u>

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

	31.3.24	31.3.23
Direct Charitable Activities	<u>4</u>	<u>3</u>

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

The total amount paid to key management personnel in the financial year was £33,605.

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	1,850	-	1,850
Charitable activities			
Supporting people with learning disability	-	76,000	76,000
Total	<u>1,850</u>	<u>76,000</u>	<u>77,850</u>
EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	-	69,127	69,127
NET INCOME	1,850	6,873	8,723
RECONCILIATION OF FUNDS			
Total funds brought forward	12,273	15,441	27,714
TOTAL FUNDS CARRIED FORWARD	<u>14,123</u>	<u>22,314</u>	<u>36,437</u>

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £2,044.

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2023 and 31 March 2024	1,405	33,690	35,095
DEPRECIATION			
At 1 April 2023	1,405	30,143	31,548
Charge for year	-	883	883
At 31 March 2024	1,405	31,026	32,431
NET BOOK VALUE			
At 31 March 2024	-	2,664	2,664
At 31 March 2023	-	3,547	3,547

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.3.24	31.3.23
	£	£
Prepayments and accrued income	316	303
	<u>316</u>	<u>303</u>

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.3.24	31.3.23
	£	£
Other creditors	7,864	2,654
	<u>7,864</u>	<u>2,654</u>

11. MOVEMENT IN FUNDS

	At 1.4.23	Net movement in funds	At 31.3.24
	£	£	£
Unrestricted funds			
General fund	14,123	1,000	15,123
Restricted funds			
Advocacy	22,314	13,865	36,179
TOTAL FUNDS	<u>36,437</u>	<u>14,865</u>	<u>51,302</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
Unrestricted funds			
General fund	1,000	-	1,000
Restricted funds			
Advocacy	115,500	(101,635)	13,865
TOTAL FUNDS	<u>116,500</u>	<u>(101,635)</u>	<u>14,865</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

11. MOVEMENT IN FUNDS - continued**Comparatives for movement in funds**

	At 1.4.22 £	Net movement in funds £	At 31.3.23 £
Unrestricted funds			
General fund	12,273	1,850	14,123
Restricted funds			
Advocacy	15,441	6,873	22,314
TOTAL FUNDS	<u>27,714</u>	<u>8,723</u>	<u>36,437</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	1,850	-	1,850
Restricted funds			
Advocacy	76,000	(69,127)	6,873
TOTAL FUNDS	<u>77,850</u>	<u>(69,127)</u>	<u>8,723</u>

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

	At 1.4.22 £	Net movement in funds £	At 31.3.24 £
Unrestricted funds			
General fund	12,273	2,850	15,123
Restricted funds			
Advocacy	15,441	20,738	36,179
TOTAL FUNDS	<u>27,714</u>	<u>23,588</u>	<u>51,302</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	2,850	-	2,850
Restricted funds			
Advocacy	191,500	(170,762)	20,738
TOTAL FUNDS	<u>194,350</u>	<u>(170,762)</u>	<u>23,588</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 March 2024.

Accounts

Trustee's Annual Report

Charity Name: People First Bridgend
CIO Number: 1166485
Period Start/End: 1st April 2022 – 31st March 2023



1. Objectives and Activities

Summary of the purposes of the charity as set out in its governing document.	SORP Reference: Para 1.17
People First Bridgend's charity objectives are: 1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens. 2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society. 3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning. 4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.	
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.	SORP Reference: Para 1.17, 1.19
Main Activities People First Bridgend advocates for adults with learning disabilities and neurodiversity living in Bridgend County, Wales. We support these people to: • Speak-up about important issues affecting their lives, • Have a voice in decisions about their care and support, Be equal, active citizens in their community, • Teach others about what it means to have learning disabilities and neurodiversity.	

We do this through several core activities, including:

- Self-Advocacy groups
- Independent Professional Advocacy
- Easy Read
- Awareness Training
- Steering Groups / Away Days
- Consultation work

People First Bridgend does this work under two local authority contracts:

1) Statutory Independent Professional Advocacy:

Advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for people entering or accessing social services provided by Bridgend County Borough Council. Clients typically need advocacy to have an equal voice or alleviate a conflict of interest when they are subject to social services functions.

2) Non-Statutory Advocacy (previously Peer-support and Skills for Independence)

Advocacy not constrained to those using statutory services. This includes several different types of activities:

- Independent advocacy for those not in receipt of or awaiting assessment for social services,
- Advisory Team self-advocacy group for adults with learning disabilities,
- Bridgend Spectrum Support Group for neurodiverse adults who benefit from peer-support,
- Training for professionals and public around learning disability and neurodiversity issues,
- Accessible information translation,
- Participation and representation of learning disability and neurodiversity in a range of networks, forums, steering groups and workstreams at a local and national level.

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

SORP Reference:
Para 1.18

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

2. 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.	SORP Reference: Para 1.20
Independent Professional Advocacy (IPA) We continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014 and for non-statutory issues. This is independent advocacy for adults with learning disabilities or autism accessing health and social services provided by Bridgend County Borough Council, or who live in Bridgend County. IPA makes sure people with care and support needs: • Have a voice in what care and support they get, • Have an equal relationship with their care provider, • Have someone who is working in their interests only, • Can understand what is going on or have help to understand if they can't, • Can put their views and wishes across or have help to if they can't. Advisory Team Self-Advocacy Group (A-Team) Our A-Team is made up of adults with learning disabilities from around Bridgend County. They use their self-advocacy voices to speak up about important issues on behalf of Bridgend's learning disability community. They do this for local, regional and national issues. The A-Team consistently met bi-monthly in-person and online. We facilitated sessions around several topical issues for our members to give self-advocacy input, including: • Welsh Government's learning disability strategic plan • Budgeting and the cost-of-living crisis • Human Rights Act and the impact of the proposed Bill of Rights • Our local authority's learning disability service development plan • Bridgend's voice in the Cwm Taf Morgannwg region • Staff recruitment • Jargon busting and communicating using easy language Bridgend Spectrum Support Group (BSSG) The BSSG is a peer-support group for adults higher-functioning autism. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice. This year, the group formed greater links with the National Autistic	

Society (NAS) and managed to run art therapy sessions in conjunction with the practice-based sessions.

Accessible Information

We translate information into Easy Read. We received the following requests for translation:

- BCBC - Compatibility Assessment Tool – Tenant
- BCBC - Compatibility Assessment Tool - Observer
- BCBC - Compatibility Assessment Tool - Prospective
- BCBC - Direct Payments Leaflet
- BCBC - Complaints and Feedback Leaflet
- BCBC - Paying for Residential and Nursing Care Information
- BCBC - Tech 2 Talk Workstream Agenda/Invites
- BCBC - Transport Workstream Agenda/Invites
- BCBC - Activities Any Time Agenda/Invites
- Mencap - Future of Day Services Invite

Training

We ran learning disability awareness training for South Wales Police called Diversity Matters, Inclusion Wins. This training was co-delivered with our Advisory Team. We trained 100 employees of South Wales from various departments.

Other Advocacy Activities

- People First Bridgend provided representation at the following events:
- BAVO Heath, Social Care and Well-being Network
- BAVO/Gig Buddies Heavy Load Film Screening
- BCBC LD Service Development Plan Meeting
- BCBC Social Services Director Focus Group
- BCBC Cabinet Scrutiny Meeting
- BCBC Locality Safeguarding and Community Safety Group
- CTM Regional LD Steering Group Meeting
- CTM Regional Advocacy Network Meeting
- National Autistic Society Art Therapy Sessions
- Tremorfa Complex Needs Day Service Tour
- Mirus Better Together Event
- Condor's Rest Consultation Interviews

- All Wales People First National Council Meeting
- All Wales People First Support Worker Advisory Network Meeting - All Wales People First Regional Council Meeting
- Alder Advice interview about Daytime Opportunities
- CTM Regional Partnership Board - Driving Change Forward Event
- University College of London STORM feedback meeting

Advocacy Quality Performance Mark (Advocacy QPM)

People First Bridgend were assessed for the Advocacy Quality Performance Mark (QPM) during the financial year. This is where the charity and its services are externally assessed against the principles in the Advocacy Code of Practice.

QPM Assessment Process

- **Desktop assessment** – policies and procedures, service specifications and case files are reviewed,
- **Site visit** – all stakeholders are interviewed, including staff, trustees, members, commissioners and referrers.
- **Report** – a final report is produced with a result of whether QPM has been awarded.

QPM Assessor comments on good practice

- **Person-centred:** People First Bridgend are completely committed to involving people with learning disabilities and autism in every aspect of the organisation. The relationship between the Advisory Group, The Trustees and Staff is meaningful and supportive. This relationship between all parties demonstrates sensitivity and understanding and it is clear to see how the service is user-led. The BSSG peer support group is facilitated by a person who was once a member of the group and is now employed full-time, showing how strong this principle is within the organisation.
- **Empowerment practice:** People First Bridgend has a strong focus on empowerment which is at the heart of the service. Throughout the organisation there is both commitment and skill in supporting people with learning disabilities and autism.
- **Accountability:** The management style of People First Bridgend makes for an open and inclusive with organisation, with everyone aware of and involved in organisational issues and service development.
- **Supporting advocates:** The focus on staff well-being was mentioned by both staff and stakeholders. Throughout the pandemic and currently, while operating with a small team, this focus on well-being is essential and recognised as a strength by all parties.
- **Accessibility:** The skills of People First Bridgend in Easy Read are exceptional. The value of Easy Read in providing information for people with learning disabilities is widely recognised. The total commitment of the service to producing Easy Read that

is tailored to meet the needs of individuals shows a skilled understanding of its importance for effective advocacy support.

QPM Assessor comments on areas for improvement

- People First Bridgend is an open organisation and is very aware of the areas that need to be addressed. The points below identify the areas we discussed on the site visit.
- There are currently vacancies for an Independent Advocate and an Advocacy Facilitator (self-advocacy). While job packs have been completed it is important for the service that these posts are filled as soon as possible.
- Funding for the organisation has always been through a Local Authority contract and/or a Service Level Agreement. As the tender process is now more rigorous it may be useful for the organisation to consider additional funding streams so that the service is sustainable.
- We discussed the difficulties in obtaining feedback from people about their satisfaction of the service. People First Bridgend need to continue to ensure that capturing feedback from individuals who have worked with a statutory advocate, perhaps at different points of the advocacy process, is constantly addressed and recorded.

Advocacy QPM Result

- People First Bridgend were successfully awarded Advocacy QPM. This certification lasts 4 years before the charity needs to be re-assessed.

3. Financial Review

Review of the charity's financial position at the end of the period.	SORP Reference: Para 1.21
Over the financial year, People First Bridgend secured the following income for its non-statutory advocacy contracts funded by Bridgend County Borough Council: + Statutory Independent Professional Advocacy: £29,700 + Non-Statutory Advocacy: £74,800 Half the financial year, the charity worked under its old contract and service level agreement. Following recommissioning, the contracts' values were increased by 17%. People First Bridgend's expenditure on its advocacy contracts is as follows: - Statutory Independent Professional Advocacy: £19,528 - Non-Statutory Advocacy: £51,268 The underspends in both contracts can be attributed to several staff vacancies, which coincided with the new contracts. A senior staff member planned to leave, which meant the vacancies under them could not be recruited for until their role had a replacement. A very challenging economic climate and job market meant that the charity had difficulty recruiting. Vacancies remained open for over a year. People First Bridgend have a good working relationship with Bridgend County Borough Council. The Council recognised that the recruitment challenges were sector wide, and that following the pandemic, there had been an exodus of staff in the health and social care and charity job market (advocacy can be considered a branch of both these areas). They therefore took no corrective action, and supported People First Bridgend to find alternative solutions whilst recruitment continued. One of the available solutions was sub-contracting. In March 2023, the charity entered into an agreement with another advocacy provider to cover some of its services whilst it continued to recruit. Recommissioning of services People First Bridgend holds two contracts with Bridgend County Borough Council (BCBC) to do advocacy services. These services were re-commissioned and put out for tender during 2022. This included a long-standing service level agreement to do non-statutory advocacy and a contract to do statutory independent professional advocacy. People First Bridgend put bids in for both. People First Bridgend's bids were successful and as of October 2022, it holds the following contracts with BCBC: 1) Specialist Statutory Independent Professional Advocacy (aka SIPA) worth £32,400 per annum:	

Supporting people entering or receiving social services to have an equal voice, particularly in functions relating to the Social Services and Well-Being (Wales) Act 2014. This is exclusively Independent Professional Advocacy.

2) Specialist Non-Statutory Advocacy (aka NSA) worth £81,600 per annum:

Supporting people outside of statutory issues to have an equal voice in their community and learn how to speak-up to protect their rights. This includes Independent Professional Advocacy and all other activities that the charity does.

These two contracts make up nearly all the charity's funding. They are the charity's core funding and fund the management and administration as well as its activities. The charity also receives a small amount of funds from chargeable training and donations.

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

SORP Reference:
Para 1.22

People First Bridgend has a risk management policy which supports the Board to assess and manage the charity's exposure to risks, such as the loss core funding. It also has a reserves policy that supports the Board to calculate how much reserves are needed to maintain the charity, should it be exposed to these risks.

The charity's policies state that reserves are funds held which are not subject to commitments, planned expenditure or other restrictions. It aims to keep a minimum of 3-months operating costs in reserves to allow for the Board to deal with:

- loss of core funding,
- maintaining staff salaries whilst attempting to secure additional funding,
- sourcing alternative services or activities for service users,
- meeting redundancy costs,
- unplanned but essential expenditure,
- covering operating costs whilst awaiting receipt of committed funding.

The charity will match reserves to these requirements and no more.

Amount of reserves held.

SORP Reference:
Para 1.22

£14,123

Reasons for holding zero reserves.

SORP Reference:
Para 1.22

N/A

Details of fund materially in deficit.

SORP Reference:
Para 1.24

N/A	
Explanation of any uncertainties about the charity continuing as a going concern.	SORP Reference: Para 1.23
People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.	
The charity's principal sources of funds (including any fundraising)	SORP Reference: Para 1.47
See above.	
A description of the principal risks facing the charity.	SORP Reference: Para 1.46
See explanation of uncertainties.	

Structure, Governance and Management

Type of governing document.	SORP Reference: Para 1.25
Constitution	
How is the charity constituted?	SORP Reference: Para 1.25
Foundation model Charitable Incorporated Organisation (or CIO)	
Trustee selection methods including details of any constitutional provisions.	SORP Reference: Para 1.25
Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees. Trustees are recruited in line with Section 9 and 10 of the constitution: • Are over 18 years old, • have appropriate skills, knowledge and experience to administrate the charity, • are invited to attend a meeting, • are approved by the trustees at a board meeting.	
Policies and procedures adopted for the induction and training of trustees.	SORP Reference: Para 1.51
When being inducted on the Board, trustees receive: • a copy of the charity's constitution, • a meeting with the Operational Manager to introduce the work of the charity, • a copy of the charity's latest annual accounts, • copies of policies and procedures, • copies of the standards which the charity works to, including the Advocacy QPM Code of Practice and the Charity Governance Code for small charities. People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include: • Trustee Code of Conduct • Values Statement • Conflict of Interests Policy • Training and Development Policy	

The charity's organisational structure and any wider network with which the charity works.

SORP Reference:
Para 1.51

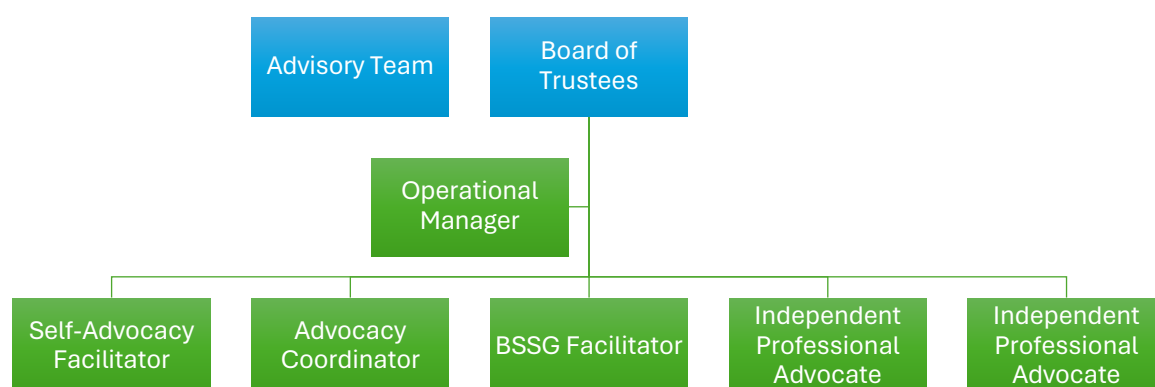
As a foundation CIO, the Board are solely responsible for the charity. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries.

In addition to the Board, People First Bridgend has an Advisory Team made up of 14 adults with learning disabilities. Whilst the Advisory Team have no say on the governance of the charity, they steer the direction of its activities through their bi-monthly self-advocacy group meetings.

The Board delegates the practical work of the charity to a staff team of five. The most senior staff member is the Operational Manager who provides the day-to-day leadership and management of the charity.

People First Bridgend is part of the wider People First self-advocacy movement, with which it maintains networking links. Particularly All Wales People First, who advocate for people with learning disabilities at a Welsh Government level. However, all People First groups are independent and are not affiliated with a higher organisation.

People First Bridgend Structure



Reference and Administrative details

Charity Name:	People First Bridgend
Other name the charity uses:	Bridgend People First (formerly)
Registered charity number:	1166485
Charity's principal address:	People First Bridgend Office 32 Apollo Business Village Heol Persondy Aberkenfig Bridgend CF32 9RF

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)
Jean Gregson	Chair		Board of Trustees
Heather Williams	Trustee		Board of Trustees
Alun Phillips	Trustee		Board of Trustees
Mike Harris	Trustee		Board of Trustees
Alys Byrne	Trustee	Resigned 21/09/2022	Board of Trustees
Judith Pickard	Trustee	Resigned 30/09/2022	Board of Trustees
Elaine Williams	Trustee	Resigned 17/04/2023	Board of Trustees
Name of CEO/most senior staff:		Adam Kurowski Wakeford – Operational Manager	

Other information:

- No corporate trustees/directors.
- No trustees hold title to property belonging to the charity.
- No funds held as custodian trustees on behalf of others.
- No advisors.
- No exemptions from disclosure.

Declarations

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

Signed on behalf of the charity's trustees:

Signature:	
Full names:	Jean Gregson
Position:	Chair of the Board of Trustees
Date:	31 st January 2024

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

The trustees present their report with the financial statements of the charity for the year ended 31 March 2023. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

OBJECTIVES AND ACTIVITIES

Activities

How People First Bridgend is run

People First Bridgend is a Charitable Incorporated Organisation (or CIO) using a foundation model. It is governed by a CIO constitution document and managed by a Board of Trustees (aka the Board).

As a foundation CIO, the Board are solely responsible for the charity. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries. The Board consists of 4 highly qualified volunteers who have nearly 100 years of professional experience in learning disability services between them.

The Board meets at least 4 times a year. Induction onto the Board includes:

- a copy of the charity's constitution,
- a meeting with the Operational Manager to introduce the work of the charity,
- a copy of the charity's latest annual accounts,
- copies of policies and procedures,
- copies of the standards which the charity works to, including the Advocacy QPM Code of Practice and the Charity Governance Code for small charities.

In addition to the Board, People First Bridgend has an Advisory Team made up of 14 adults with learning disabilities. Whilst the Advisory Team have no say on the governance of the charity, they steer the direction of its activities through their bi-monthly self-advocacy group meetings.

The Board delegates the practical work of the charity to a staff team of five. The most senior staff member is the Operational Manager who provides the day-to-day leadership and management of the charity.

The work of People First Bridgend

People First Bridgend advocates for adults with learning disabilities and neurodiversity.

It supports these people to:

- Speak-up about important issues affecting their lives,
- Have a voice in decisions about their care and support,
- Be equal, active citizens in their community,
- Teach others about what it means to have learning disabilities and neurodiversity.

It does this through several core activities, including:

- Self-Advocacy groups
- Independent Professional Advocacy
- Easy Read
- Awareness Training
- Steering Groups / Away Days
- Consultation work

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

ACHIEVEMENT AND PERFORMANCE

People First Bridgend's Services

People First Bridgend does its work under two local authority contracts:

- 1) Statutory Independent Professional Advocacy**
- 2) Non-Statutory Advocacy (previously Peer-support and Skills for Independence)**

Statutory Independent Professional Advocacy

People First Bridgend continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for people entering or accessing social services provided by Bridgend County Borough Council. Clients typically need advocacy to have an equal voice or alleviate a conflict of interest when they are subject to social services functions.

Statistics:

- Received 16 new referrals
- Worked with 18 clients
- Supported with 54 advocacy issues
- Closed 6 clients
- Closed 16 advocacy issues

Referrals came from:

- BCBC Social Services Learning Disability Team
- BCBC Social Services Safeguarding Team
- Bridgend Voice and Choice Advocacy Hub
- BAVO Community Navigators
- Parc Prison
- Devonalds Solicitors
- Cartrefi Cymru Co-operative
- Glanrhyd Community Cluster Navigator

Advocacy issues included:

- Assessment, care and support planning, reviews
- Safeguarding
- Accessing information, advice and assistance
- Accommodation issues
- Concern, dissatisfaction and complaints
- Change of service type, preparing to leave hospital and enter the community
- Prison

Both of People First Bridgend's advocates left during the financial year. This resulted in protracted recruitment attempts and staff shortages. This affected how many people the service was able to support. A waiting list for referrals was used from quarter 2-4. Following quarter 4, a sub-contracting agreement allowed another advocacy organisation to take the services' referrals whilst recruitment continued.

Non-Statutory Advocacy (previously Peer-support and Skills for Independence)

This service is split into several activities:

Independent Advocacy

This is independent advocacy for people who are not in receipt of social services.

Statistics:

- Received 6 new referrals
- Worked with 15 clients
- Supported with 15 advocacy issues
- Closed 12 clients
- Closed 12 advocacy issues

Advocacy issues included:

- Child protection procedures

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

- Concern, dissatisfaction and complaints
- Hate Crime
- Assessment, Care and Support Planning, Reviews
- Accommodation
- Finances

As with Statutory advocacy, staff shortages affected the capacity of this service.

Advisory Team

This is a self-advocacy group for adults with learning disabilities. Topics are brought to the meetings for members to learn and have a say about. Meetings were run in-person and virtually.

Statistics:

- 15 individuals came to the BSSG
- 22 in-person workshops were held
- 65 attendances were recorded for in-person workshops
- 12 virtual sessions were held
- 90 attendances were recorded for virtual sessions

Meeting topics included:

- Welsh Government LD Strategic Plan consultation
- What is Advocacy? re-cap
- Healthy Eating and Exercising
- Jargon-busting/accessible communication
- Mapping Wales by county and region
- LD liaison nurse visit
- Preparation for BCBC Away Day
- Budgeting/cost-of-living crisis priorities
- Human Rights/Bill of rights introduction
- Advocacy QPM preparation
- Drama and Self-Confidence Workshop
- All Wales National Rep Info and Voting
- Cwm Taf Morgannwg region and steering group explanation
- Recruiting Staff - What makes a good leader?
- BCBC's LD development plan and explanation

Bridgend Spectrum Support Group (BSSG)

The BSSG is a peer-support group for adults who are high-functioning on the autism spectrum. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice.

Statistics:

- 47 individuals came to the BSSG
- 35 practice-based sessions were held
- 235 attendances were recorded for practice-based sessions
- 9 social-based session were held
- 90 attendances were recorded for social-based sessions

Training

2 Diversity Matters, Inclusion Wins training sessions were delivered for South Wales Police. 100 attendances were recorded for these sessions.

Easy Read

The following documents were translated into Easy Read:

- BCBC - Compatibility Assessment Tool - Tenant

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

- BCBC - Compatibility Assessment Tool - Observer
- BCBC - Compatibility Assessment Tool - Prospective
- BCBC - Direct Payments Leaflet
- BCBC - Complaints and Feedback Leaflet
- BCBC - Paying for Residential and Nursing Care Information
- BCBC - Tech 2 Talk Workstream Agenda/Invites
- BCBC - Transport Workstream Agenda/Invites
- BCBC - Activities Any Time Agenda/Invites
- Mencap - Future of Day Services Invite

Other Activities

People First Bridgend provided representation at the following events:

- BAVO Heath, Social Care and Well-being Network
- BAVO/Gig Buddies Heavy Load Film Screening
- BCBC LD Service Development Plan Meeting
- BCBC Social Services Director Focus Group
- BCBC Cabinet Scrutiny Meeting
- BCBC Locality Safeguarding and Community Safety Group
- CTM Regional LD Steering Group Meeting
- CTM Regional Advocacy Network Meeting
- National Autistic Society Art Therapy Sessions
- Tremorfa Complex Needs Day Service Tour
- Mirus Better Together Event
- Condor's Rest Consultation Interviews
- All Wales People First National Council Meeting
- All Wales People First Support Worker Advisory Network Meeting
- All Wales People First Regional Council Meeting
- Alder Advice interview about Daytime Opportunities
- CTM Regional Partnership Board - Driving Change Forward Event
- University College of London STORM feedback meeting

Advocacy QPM

People First Bridgend were assessed for the Advocacy Quality Performance Mark (QPM) during the financial year. This is where the charity and its services are externally assessed against the principles in the Advocacy Code of Practice.

QPM Assessment Process

- Desktop assessment - policies and procedures, service specifications and case files are reviewed,
- Site visit - all stakeholders are interviewed, including staff, trustees, members, commissioners and referrers.
- Report - a final report is produced with a result of whether QPM has been awarded.

QPM Assessor comments on good practice

- Person-centred: People First Bridgend are completely committed to involving people with learning disabilities and autism in every aspect of the organisation. The relationship between the Advisory Group, The Trustees and Staff is meaningful and supportive. This relationship between all parties demonstrates sensitivity and understanding and it is clear to see how the service is user-led. The BSSG peer support group is facilitated by a person who was once a member of the group and is now employed full-time, showing how strong this principle is within the organisation.
- Empowerment practice: People First Bridgend has a strong focus on empowerment which is at the heart of the service. Throughout the organisation there is both commitment and skill in supporting people with learning disabilities and autism.
- Accountability: The management style of People First Bridgend makes for an open and inclusive with organisation, with everyone aware of and involved in organisational issues and service development.
- Supporting advocates: The focus on staff well-being was mentioned by both staff and stakeholders. Throughout the pandemic and currently, while operating with a small team, this focus on well-being is essential and recognised as a strength by all parties.

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

- Accessibility: The skills of People First Bridgend in Easy Read are exceptional. The value of Easy Read in providing information for people with learning disabilities is widely recognised. The total commitment of the service to producing Easy Read that is tailored to meet the needs of individuals shows a skilled understanding of its importance for effective advocacy support.

QPM Assessor comments on areas for improvement

- People First Bridgend is an open organisation and is very aware of the areas that need to be addressed. The points below identify the areas we discussed on the site visit.
- There are currently vacancies for an Independent Advocate and an Advocacy Facilitator (self-advocacy). While job packs have been completed it is important for the service that these posts are filled as soon as possible.
- Funding for the organisation has always been through a Local Authority contract and/or a Service Level Agreement. As the tender process is now more rigorous it may be useful for the organisation to consider additional funding streams so that the service is sustainable.
- We discussed the difficulties in obtaining feedback from people about their satisfaction of the service. People First Bridgend need to continue to ensure that capturing feedback from individuals who have worked with a statutory advocate, perhaps at different points of the advocacy process, is constantly addressed and recorded.

Advocacy QPM Result

People First Bridgend were successfully awarded Advocacy QPM. This certification lasts 4 years before the charity needs to be re-assessed.

FINANCIAL REVIEW

Financial position

Over the financial year, People First Bridgend secured the following income for its non-statutory advocacy contracts funded by Bridgend County Borough Council:

- + Statutory Independent Professional Advocacy:** £29,700
- + Non-Statutory Advocacy:** £74,800

Half the financial year, the charity worked under its old contract and service level agreement. Following recommissioning, the contracts' values were increased by 17%.

People First Bridgend's expenditure on its advocacy contracts is as follows:

- Statutory Independent Professional Advocacy:** £19,528
- Non-Statutory Advocacy:** £51,268

The underspends in both contracts can be attributed to several staff vacancies, which coincided with the new contracts. A senior staff member planned to leave, which meant the vacancies under them could not be recruited for until their role had a replacement. A very challenging economic climate and job market meant that the charity had difficulty recruiting. Vacancies remained open for over a year.

People First Bridgend have a good working relationship with Bridgend County Borough Council. The Council recognised that the recruitment challenges were sector wide, and that following the pandemic, there had been an exodus of staff in the health and social care and charity job market (advocacy can be considered a branch of both these areas). They therefore took no corrective action, and supported People First Bridgend to find alternative solutions whilst recruitment continued.

One of the available solutions was sub-contracting. In March 2023, the charity entered into an agreement with another advocacy provider to cover some of its services whilst it continued to recruit.

FINANCIAL REVIEW

Principal funding sources

People First Bridgend holds two contracts with Bridgend County Borough Council (BCBC) to do advocacy services. These services were re-commissioned and put out for tender during 2022. This included a long-standing service level agreement to do non-statutory advocacy and a contract to do statutory independent professional advocacy. People First Bridgend put bids in for both.

People First Bridgend's bids were successful and as of October 2022, it holds the following contracts with BCBC:

1. Specialist Statutory Independent Professional Advocacy (aka SIPA) worth £32,400 per annum:
Supporting people entering or receiving social services to have an equal voice, particularly in functions relating to the Social Services and Well-Being (Wales) Act 2014. This is exclusively Independent Professional Advocacy.
2. Specialist Non-Statutory Advocacy (aka NSA) worth £81,600 per annum:
Supporting people outside of statutory issues to have an equal voice in their community and learn how to speak-up to protect their rights. This includes Independent Professional Advocacy and all other activities that the charity does.

These two contracts make up nearly all the charity's funding. They are the charity's core funding and fund the management and administration as well as its activities. The charity also receives a small amount of funds from chargeable training and donations.

Reserves policy

People First Bridgend has a risk management policy which supports the Board to assess and manage the charity's exposure to risks, such as the loss of core funding. It also has a reserves policy that supports the Board to calculate how much reserves are needed to maintain the charity, should it be exposed to these risks.

The charity's policies state that reserves are funds held which are not subject to commitments, planned expenditure or other restrictions. It aims to keep a minimum of 3-months operating costs in reserves to allow for the Board to deal with:

- loss of core funding,
- maintaining staff salaries whilst attempting to secure additional funding,
- sourcing alternative services or activities for service users,
- meeting redundancy costs,
- unplanned but essential expenditure,
- covering operating costs whilst awaiting receipt of committed funding.

The charity will match reserves to these requirements and no more.

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

FUTURE PLANS

People First Bridgend will carry over the restricted funding relating to the underspend into the next financial year. Working with the Council, the charity plans to use it to improve its existing services and do additional work requested by the Council.

During the financial year, the charity was assessed for the Advocacy Quality Performance Mark. It measures how well the charity is working to the Advocacy Code of Practice. People First Bridgend was successfully awarded this in August 2022. Certification lasts 4 years.

Part of the Advocacy QPM assessment process looks at areas of improvement for the charity. These were:

- **Diversify funding** - decrease reliance on local authority funding.
- **Recruit more staff** - get back to full staff capacity.

People First Bridgend also asked its Advisory Team what they felt should be priorities for the next financial year. They said:

- **Training** - do more training about learning disability with the police and students.
- **Events** - do more outings and events together.

People First Bridgend expects topical issues relating to the UK's economic situation and austerity measures to affect its beneficiaries over the next year. It will look for ways people can have a voice in any plans to change their public services.

People First Bridgend will take on-board this information and plan accordingly.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The Charity is controlled by its governing document, a constitution, and constitutes a Charitable Incorporated Organisation (CIO) as defined by the Charities Act 2011.

Recruitment and appointment of new trustees

Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are recruited in line with Section 9 and 10 of the constitution:

- Are over 18 years old,
- Have appropriate skills, knowledge and experience to administrate the charity,
- Are invited to attend a meeting,
- Are approved by the trustees at an executive meeting.

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy
- Supplementary guidance (Charity Commission, Governance Code, Advocacy QPM)

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Board of Trustees

- 4 Trustees

Staff Team

- Operational Manager
- Independent Professional Advocate
- Advocacy Coordinator
- Self-Advocacy Facilitator
- BSSG Facilitator
- Chair of Better Together Bridgend

Advisory Team

- 14 Members

People First Bridgend is part of the wider People First self-advocacy movement, with which it maintains networking links. Particularly All Wales People First, who advocate for people with learning disabilities at a Welsh Government level. However, all People First groups are independent and are not affiliated with a higher organisation.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Judith Pickard (resigned 30/09/2022)
Jean Gregson
Heather Williams
Alun Phillips
Elaine Williams (resigned 17/04/2023)
Michael John Harris
Alys Elizabeth Byrne (resigned 21/09/2022)

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

Approved by order of the board of trustees on 26 January 2024 and signed on its behalf by:

A handwritten signature in black ink, appearing to read 'J. E. Gregson', is written over a light blue horizontal line.

Jean Gregson - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2023.

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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

26 January 2024

PEOPLE FIRST BRIDGEND

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2023

	Notes	Unrestricted fund £	Restricted fund £	2023 Total funds £	2022 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		1,850	-	1,850	1,000
Charitable activities	2				
Supporting people with learning disability		-	76,000	76,000	105,055
Total		<u>1,850</u>	<u>76,000</u>	<u>77,850</u>	<u>106,055</u>
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		-	69,127	69,127	99,829
NET INCOME		1,850	6,873	8,723	6,226
RECONCILIATION OF FUNDS					
Total funds brought forward		12,273	15,441	27,714	21,488
TOTAL FUNDS CARRIED FORWARD		<u>14,123</u>	<u>22,314</u>	<u>36,437</u>	<u>27,714</u>

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

BALANCE SHEET
31 MARCH 2023

	Notes	Unrestricted fund £	Restricted fund £	2023 Total funds £	2022 Total funds £
FIXED ASSETS					
Tangible assets	8	-	3,547	3,547	3,116
CURRENT ASSETS					
Debtors	9	-	303	303	299
Cash at bank		14,123	21,118	35,241	28,198
		<u>14,123</u>	<u>21,421</u>	<u>35,544</u>	<u>28,497</u>
CREDITORS					
Amounts falling due within one year	10	-	(2,654)	(2,654)	(3,899)
		<u>14,123</u>	<u>18,767</u>	<u>32,890</u>	<u>24,598</u>
NET CURRENT ASSETS					
		<u>14,123</u>	<u>18,767</u>	<u>32,890</u>	<u>24,598</u>
TOTAL ASSETS LESS CURRENT LIABILITIES					
		<u>14,123</u>	<u>22,314</u>	<u>36,437</u>	<u>27,714</u>
NET ASSETS					
		<u>14,123</u>	<u>22,314</u>	<u>36,437</u>	<u>27,714</u>
FUNDS	11				
Unrestricted funds				14,123	12,273
Restricted funds				<u>22,314</u>	<u>15,441</u>
TOTAL FUNDS				<u>36,437</u>	<u>27,714</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 26 January 2024 and were signed on its behalf by:



Jean Gregson - Trustee

The notes form part of these financial statements

**NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023**

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME FROM CHARITABLE ACTIVITIES

The BCBC Peer-support and Skills for Independence SLA grant was used to provide preventative advocacy-related services to people with learning disabilities and/or autism spectrum condition.

The BCBC Statutory Independent Professional Advocacy contract funds were used to provide crisis/intervention advocacy services to people with learning disabilities and/or autism spectrum condition.

The Covid-19 Recovery Grant was used to support learning disability advocacy services.

The breakdown of grant income received during the year is as follows:

	£
BCBC SLA Grant	54,400
BCBC SIPA Contract	21,600
	<u>76,000</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>61,967</u>	<u>7,160</u>	<u>69,127</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2023 nor for the year ended 31 March 2022.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2023 nor for the year ended 31 March 2022.

5. STAFF COSTS

	2023 £	2022 £
Wages and salaries	46,519	66,948
Other pension costs	891	2,879
	<u>47,410</u>	<u>69,827</u>

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

	2023	2022
Direct Charitable Activities	<u>3</u>	<u>5</u>

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

The total amount paid to key management personnel in the financial year was £30,013.

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	1,000	-	1,000
Charitable activities			
Supporting people with learning disability	1,055	104,000	105,055
Total	<u>2,055</u>	<u>104,000</u>	<u>106,055</u>
EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	6,359	93,470	99,829
NET INCOME/(EXPENDITURE)	(4,304)	10,530	6,226
RECONCILIATION OF FUNDS			
Total funds brought forward	16,577	4,911	21,488
TOTAL FUNDS CARRIED FORWARD	<u>12,273</u>	<u>15,441</u>	<u>27,714</u>

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £1,730.

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2022	1,405	32,457	33,862
Additions	-	1,233	1,233
At 31 March 2023	<u>1,405</u>	<u>33,690</u>	<u>35,095</u>
DEPRECIATION			
At 1 April 2022	1,405	29,341	30,746
Charge for year	-	802	802
At 31 March 2023	<u>1,405</u>	<u>30,143</u>	<u>31,548</u>
NET BOOK VALUE			
At 31 March 2023	<u>-</u>	<u>3,547</u>	<u>3,547</u>
At 31 March 2022	<u>-</u>	<u>3,116</u>	<u>3,116</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Prepayments and accrued income	303	299

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Trade creditors	-	1,722
Other creditors	2,654	2,177
	<u>2,654</u>	<u>3,899</u>

11. MOVEMENT IN FUNDS

	At 1.4.22 £	Net movement in funds £	At 31.3.23 £
Unrestricted funds			
General fund	12,273	1,850	14,123
Restricted funds			
Advocacy	15,441	6,873	22,314
TOTAL FUNDS	<u>27,714</u>	<u>8,723</u>	<u>36,437</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	1,850	-	1,850
Restricted funds			
Advocacy	76,000	(69,127)	6,873
TOTAL FUNDS	<u>77,850</u>	<u>(69,127)</u>	<u>8,723</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

11. MOVEMENT IN FUNDS - continued**Comparatives for movement in funds**

	At 1.4.21 £	Net movement in funds £	At 31.3.22 £
Unrestricted funds			
General fund	16,577	(4,304)	12,273
Restricted funds			
Advocacy	4,911	10,530	15,441
TOTAL FUNDS	<u>21,488</u>	<u>6,226</u>	<u>27,714</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	2,055	(6,359)	(4,304)
Restricted funds			
Advocacy	104,000	(93,470)	10,530
TOTAL FUNDS	<u>106,055</u>	<u>(99,829)</u>	<u>6,226</u>

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

	At 1.4.21 £	Net movement in funds £	At 31.3.23 £
Unrestricted funds			
General fund	16,577	(2,454)	14,123
Restricted funds			
Advocacy	4,911	17,403	22,314
TOTAL FUNDS	<u>21,488</u>	<u>14,949</u>	<u>36,437</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	3,905	(6,359)	(2,454)
Restricted funds			
Advocacy	180,000	(162,597)	17,403
TOTAL FUNDS	<u>183,905</u>	<u>(168,956)</u>	<u>14,949</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

In the financial year, £592 (2022: £4,662) was paid to former manager and trustee of People First Bridgend, Katrina Kurowski. The full amount was in relation to sessional fees.

An amount of £1,700 was donated to the charity by a trustee.

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

The trustees present their report with the financial statements of the charity for the year ended 31 March 2023. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

OBJECTIVES AND ACTIVITIES

Activities

How People First Bridgend is run

People First Bridgend is a Charitable Incorporated Organisation (or CIO) using a foundation model. It is governed by a CIO constitution document and managed by a Board of Trustees (aka the Board).

As a foundation CIO, the Board are solely responsible for the charity. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries. The Board consists of 4 highly qualified volunteers who have nearly 100 years of professional experience in learning disability services between them.

The Board meets at least 4 times a year. Induction onto the Board includes:

- a copy of the charity's constitution,
- a meeting with the Operational Manager to introduce the work of the charity,
- a copy of the charity's latest annual accounts,
- copies of policies and procedures,
- copies of the standards which the charity works to, including the Advocacy QPM Code of Practice and the Charity Governance Code for small charities.

In addition to the Board, People First Bridgend has an Advisory Team made up of 14 adults with learning disabilities. Whilst the Advisory Team have no say on the governance of the charity, they steer the direction of its activities through their bi-monthly self-advocacy group meetings.

The Board delegates the practical work of the charity to a staff team of five. The most senior staff member is the Operational Manager who provides the day-to-day leadership and management of the charity.

The work of People First Bridgend

People First Bridgend advocates for adults with learning disabilities and neurodiversity.

It supports these people to:

- Speak-up about important issues affecting their lives,
- Have a voice in decisions about their care and support,
- Be equal, active citizens in their community,
- Teach others about what it means to have learning disabilities and neurodiversity.

It does this through several core activities, including:

- Self-Advocacy groups
- Independent Professional Advocacy
- Easy Read
- Awareness Training
- Steering Groups / Away Days
- Consultation work

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

ACHIEVEMENT AND PERFORMANCE

People First Bridgend's Services

People First Bridgend does its work under two local authority contracts:

- 1) Statutory Independent Professional Advocacy**
- 2) Non-Statutory Advocacy (previously Peer-support and Skills for Independence)**

Statutory Independent Professional Advocacy

People First Bridgend continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014. This is independent advocacy for people entering or accessing social services provided by Bridgend County Borough Council. Clients typically need advocacy to have an equal voice or alleviate a conflict of interest when they are subject to social services functions.

Statistics:

- Received 16 new referrals
- Worked with 18 clients
- Supported with 54 advocacy issues
- Closed 6 clients
- Closed 16 advocacy issues

Referrals came from:

- BCBC Social Services Learning Disability Team
- BCBC Social Services Safeguarding Team
- Bridgend Voice and Choice Advocacy Hub
- BAVO Community Navigators
- Parc Prison
- Devonalds Solicitors
- Cartrefi Cymru Co-operative
- Glanrhyd Community Cluster Navigator

Advocacy issues included:

- Assessment, care and support planning, reviews
- Safeguarding
- Accessing information, advice and assistance
- Accommodation issues
- Concern, dissatisfaction and complaints
- Change of service type, preparing to leave hospital and enter the community
- Prison

Both of People First Bridgend's advocates left during the financial year. This resulted in protracted recruitment attempts and staff shortages. This affected how many people the service was able to support. A waiting list for referrals was used from quarter 2-4. Following quarter 4, a sub-contracting agreement allowed another advocacy organisation to take the services' referrals whilst recruitment continued.

Non-Statutory Advocacy (previously Peer-support and Skills for Independence)

This service is split into several activities:

Independent Advocacy

This is independent advocacy for people who are not in receipt of social services.

Statistics:

- Received 6 new referrals
- Worked with 15 clients
- Supported with 15 advocacy issues
- Closed 12 clients
- Closed 12 advocacy issues

Advocacy issues included:

- Child protection procedures

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- Concern, dissatisfaction and complaints
- Hate Crime
- Assessment, Care and Support Planning, Reviews
- Accommodation
- Finances

As with Statutory advocacy, staff shortages affected the capacity of this service.

Advisory Team

This is a self-advocacy group for adults with learning disabilities. Topics are brought to the meetings for members to learn and have a say about. Meetings were run in-person and virtually.

Statistics:

- 15 individuals came to the BSSG
- 22 in-person workshops were held
- 65 attendances were recorded for in-person workshops
- 12 virtual sessions were held
- 90 attendances were recorded for virtual sessions

Meeting topics included:

- Welsh Government LD Strategic Plan consultation
- What is Advocacy? re-cap
- Healthy Eating and Exercising
- Jargon-busting/accessible communication
- Mapping Wales by county and region
- LD liaison nurse visit
- Preparation for BCBC Away Day
- Budgeting/cost-of-living crisis priorities
- Human Rights/Bill of rights introduction
- Advocacy QPM preparation
- Drama and Self-Confidence Workshop
- All Wales National Rep Info and Voting
- Cwm Taf Morgannwg region and steering group explanation
- Recruiting Staff - What makes a good leader?
- BCBC's LD development plan and explanation

Bridgend Spectrum Support Group (BSSG)

The BSSG is a peer-support group for adults who are high-functioning on the autism spectrum. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice.

Statistics:

- 47 individuals came to the BSSG
- 35 practice-based sessions were held
- 235 attendances were recorded for practice-based sessions
- 9 social-based session were held
- 90 attendances were recorded for social-based sessions

Training

2 Diversity Matters, Inclusion Wins training sessions were delivered for South Wales Police. 100 attendances were recorded for these sessions.

Easy Read

The following documents were translated into Easy Read:

- BCBC - Compatibility Assessment Tool - Tenant

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

- BCBC - Compatibility Assessment Tool - Observer
- BCBC - Compatibility Assessment Tool - Prospective
- BCBC - Direct Payments Leaflet
- BCBC - Complaints and Feedback Leaflet
- BCBC - Paying for Residential and Nursing Care Information
- BCBC - Tech 2 Talk Workstream Agenda/Invites
- BCBC - Transport Workstream Agenda/Invites
- BCBC - Activities Any Time Agenda/Invites
- Mencap - Future of Day Services Invite

Other Activities

People First Bridgend provided representation at the following events:

- BAVO Heath, Social Care and Well-being Network
- BAVO/Gig Buddies Heavy Load Film Screening
- BCBC LD Service Development Plan Meeting
- BCBC Social Services Director Focus Group
- BCBC Cabinet Scrutiny Meeting
- BCBC Locality Safeguarding and Community Safety Group
- CTM Regional LD Steering Group Meeting
- CTM Regional Advocacy Network Meeting
- National Autistic Society Art Therapy Sessions
- Tremorfa Complex Needs Day Service Tour
- Mirus Better Together Event
- Condor's Rest Consultation Interviews
- All Wales People First National Council Meeting
- All Wales People First Support Worker Advisory Network Meeting
- All Wales People First Regional Council Meeting
- Alder Advice interview about Daytime Opportunities
- CTM Regional Partnership Board - Driving Change Forward Event
- University College of London STORM feedback meeting

Advocacy QPM

People First Bridgend were assessed for the Advocacy Quality Performance Mark (QPM) during the financial year. This is where the charity and its services are externally assessed against the principles in the Advocacy Code of Practice.

QPM Assessment Process

- Desktop assessment - policies and procedures, service specifications and case files are reviewed,
- Site visit - all stakeholders are interviewed, including staff, trustees, members, commissioners and referrers.
- Report - a final report is produced with a result of whether QPM has been awarded.

QPM Assessor comments on good practice

- Person-centred: People First Bridgend are completely committed to involving people with learning disabilities and autism in every aspect of the organisation. The relationship between the Advisory Group, The Trustees and Staff is meaningful and supportive. This relationship between all parties demonstrates sensitivity and understanding and it is clear to see how the service is user-led. The BSSG peer support group is facilitated by a person who was once a member of the group and is now employed full-time, showing how strong this principle is within the organisation.
- Empowerment practice: People First Bridgend has a strong focus on empowerment which is at the heart of the service. Throughout the organisation there is both commitment and skill in supporting people with learning disabilities and autism.
- Accountability: The management style of People First Bridgend makes for an open and inclusive with organisation, with everyone aware of and involved in organisational issues and service development.
- Supporting advocates: The focus on staff well-being was mentioned by both staff and stakeholders. Throughout the pandemic and currently, while operating with a small team, this focus on well-being is essential and recognised as a strength by all parties.

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- Accessibility: The skills of People First Bridgend in Easy Read are exceptional. The value of Easy Read in providing information for people with learning disabilities is widely recognised. The total commitment of the service to producing Easy Read that is tailored to meet the needs of individuals shows a skilled understanding of its importance for effective advocacy support.

QPM Assessor comments on areas for improvement

- People First Bridgend is an open organisation and is very aware of the areas that need to be addressed. The points below identify the areas we discussed on the site visit.
- There are currently vacancies for an Independent Advocate and an Advocacy Facilitator (self-advocacy). While job packs have been completed it is important for the service that these posts are filled as soon as possible.
- Funding for the organisation has always been through a Local Authority contract and/or a Service Level Agreement. As the tender process is now more rigorous it may be useful for the organisation to consider additional funding streams so that the service is sustainable.
- We discussed the difficulties in obtaining feedback from people about their satisfaction of the service. People First Bridgend need to continue to ensure that capturing feedback from individuals who have worked with a statutory advocate, perhaps at different points of the advocacy process, is constantly addressed and recorded.

Advocacy QPM Result

People First Bridgend were successfully awarded Advocacy QPM. This certification lasts 4 years before the charity needs to be re-assessed.

FINANCIAL REVIEW

Financial position

Over the financial year, People First Bridgend secured the following income for its non-statutory advocacy contracts funded by Bridgend County Borough Council:

- + Statutory Independent Professional Advocacy:** £29,700
- + Non-Statutory Advocacy:** £74,800

Half the financial year, the charity worked under its old contract and service level agreement. Following recommissioning, the contracts' values were increased by 17%.

People First Bridgend's expenditure on its advocacy contracts is as follows:

- Statutory Independent Professional Advocacy:** £19,528
- Non-Statutory Advocacy:** £51,268

The underspends in both contracts can be attributed to several staff vacancies, which coincided with the new contracts. A senior staff member planned to leave, which meant the vacancies under them could not be recruited for until their role had a replacement. A very challenging economic climate and job market meant that the charity had difficulty recruiting. Vacancies remained open for over a year.

People First Bridgend have a good working relationship with Bridgend County Borough Council. The Council recognised that the recruitment challenges were sector wide, and that following the pandemic, there had been an exodus of staff in the health and social care and charity job market (advocacy can be considered a branch of both these areas). They therefore took no corrective action, and supported People First Bridgend to find alternative solutions whilst recruitment continued.

One of the available solutions was sub-contracting. In March 2023, the charity entered into an agreement with another advocacy provider to cover some of its services whilst it continued to recruit.

FINANCIAL REVIEW

Principal funding sources

People First Bridgend holds two contracts with Bridgend County Borough Council (BCBC) to do advocacy services. These services were re-commissioned and put out for tender during 2022. This included a long-standing service level agreement to do non-statutory advocacy and a contract to do statutory independent professional advocacy. People First Bridgend put bids in for both.

People First Bridgend's bids were successful and as of October 2022, it holds the following contracts with BCBC:

1. Specialist Statutory Independent Professional Advocacy (aka SIPA) worth £32,400 per annum:
Supporting people entering or receiving social services to have an equal voice, particularly in functions relating to the Social Services and Well-Being (Wales) Act 2014. This is exclusively Independent Professional Advocacy.
2. Specialist Non-Statutory Advocacy (aka NSA) worth £81,600 per annum:
Supporting people outside of statutory issues to have an equal voice in their community and learn how to speak-up to protect their rights. This includes Independent Professional Advocacy and all other activities that the charity does.

These two contracts make up nearly all the charity's funding. They are the charity's core funding and fund the management and administration as well as its activities. The charity also receives a small amount of funds from chargeable training and donations.

Reserves policy

People First Bridgend has a risk management policy which supports the Board to assess and manage the charity's exposure to risks, such as the loss of core funding. It also has a reserves policy that supports the Board to calculate how much reserves are needed to maintain the charity, should it be exposed to these risks.

The charity's policies state that reserves are funds held which are not subject to commitments, planned expenditure or other restrictions. It aims to keep a minimum of 3-months operating costs in reserves to allow for the Board to deal with:

- loss of core funding,
- maintaining staff salaries whilst attempting to secure additional funding,
- sourcing alternative services or activities for service users,
- meeting redundancy costs,
- unplanned but essential expenditure,
- covering operating costs whilst awaiting receipt of committed funding.

The charity will match reserves to these requirements and no more.

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

FUTURE PLANS

People First Bridgend will carry over the restricted funding relating to the underspend into the next financial year. Working with the Council, the charity plans to use it to improve its existing services and do additional work requested by the Council.

During the financial year, the charity was assessed for the Advocacy Quality Performance Mark. It measures how well the charity is working to the Advocacy Code of Practice. People First Bridgend was successfully awarded this in August 2022. Certification lasts 4 years.

Part of the Advocacy QPM assessment process looks at areas of improvement for the charity. These were:

- **Diversify funding** - decrease reliance on local authority funding.
- **Recruit more staff** - get back to full staff capacity.

People First Bridgend also asked its Advisory Team what they felt should be priorities for the next financial year. They said:

- **Training** - do more training about learning disability with the police and students.
- **Events** - do more outings and events together.

People First Bridgend expects topical issues relating to the UK's economic situation and austerity measures to affect its beneficiaries over the next year. It will look for ways people can have a voice in any plans to change their public services.

People First Bridgend will take on-board this information and plan accordingly.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The Charity is controlled by its governing document, a constitution, and constitutes a Charitable Incorporated Organisation (CIO) as defined by the Charities Act 2011.

Recruitment and appointment of new trustees

Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are recruited in line with Section 9 and 10 of the constitution:

- Are over 18 years old,
- Have appropriate skills, knowledge and experience to administrate the charity,
- Are invited to attend a meeting,
- Are approved by the trustees at an executive meeting.

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy
- Supplementary guidance (Charity Commission, Governance Code, Advocacy QPM)

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Board of Trustees

- 4 Trustees

Staff Team

- Operational Manager
- Independent Professional Advocate
- Advocacy Coordinator
- Self-Advocacy Facilitator
- BSSG Facilitator
- Chair of Better Together Bridgend

Advisory Team

- 14 Members

People First Bridgend is part of the wider People First self-advocacy movement, with which it maintains networking links. Particularly All Wales People First, who advocate for people with learning disabilities at a Welsh Government level. However, all People First groups are independent and are not affiliated with a higher organisation.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Judith Pickard (resigned 30/09/2022)
Jean Gregson
Heather Williams
Alun Phillips
Elaine Williams (resigned 17/04/2023)
Michael John Harris
Alys Elizabeth Byrne (resigned 21/09/2022)

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2023**

Approved by order of the board of trustees on 26 January 2024 and signed on its behalf by:

A handwritten signature in black ink, appearing to read 'J. E. Gregson', written over a light blue horizontal line.

Jean Gregson - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2023.

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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

26 January 2024

PEOPLE FIRST BRIDGEND

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2023

	Notes	Unrestricted fund £	Restricted fund £	2023 Total funds £	2022 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		1,850	-	1,850	1,000
Charitable activities	2				
Supporting people with learning disability		-	76,000	76,000	105,055
Total		<u>1,850</u>	<u>76,000</u>	<u>77,850</u>	<u>106,055</u>
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		-	69,127	69,127	99,829
NET INCOME		1,850	6,873	8,723	6,226
RECONCILIATION OF FUNDS					
Total funds brought forward		12,273	15,441	27,714	21,488
TOTAL FUNDS CARRIED FORWARD		<u>14,123</u>	<u>22,314</u>	<u>36,437</u>	<u>27,714</u>

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

BALANCE SHEET
31 MARCH 2023

	Notes	Unrestricted fund £	Restricted fund £	2023 Total funds £	2022 Total funds £
FIXED ASSETS					
Tangible assets	8	-	3,547	3,547	3,116
CURRENT ASSETS					
Debtors	9	-	303	303	299
Cash at bank		14,123	21,118	35,241	28,198
		<u>14,123</u>	<u>21,421</u>	<u>35,544</u>	<u>28,497</u>
CREDITORS					
Amounts falling due within one year	10	-	(2,654)	(2,654)	(3,899)
		<u>14,123</u>	<u>18,767</u>	<u>32,890</u>	<u>24,598</u>
NET CURRENT ASSETS					
		<u>14,123</u>	<u>18,767</u>	<u>32,890</u>	<u>24,598</u>
TOTAL ASSETS LESS CURRENT LIABILITIES					
		<u>14,123</u>	<u>22,314</u>	<u>36,437</u>	<u>27,714</u>
NET ASSETS					
		<u>14,123</u>	<u>22,314</u>	<u>36,437</u>	<u>27,714</u>
FUNDS	11				
Unrestricted funds				14,123	12,273
Restricted funds				<u>22,314</u>	<u>15,441</u>
TOTAL FUNDS				<u>36,437</u>	<u>27,714</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 26 January 2024 and were signed on its behalf by:



Jean Gregson - Trustee

The notes form part of these financial statements

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

2. INCOME FROM CHARITABLE ACTIVITIES

The BCBC Peer-support and Skills for Independence SLA grant was used to provide preventative advocacy-related services to people with learning disabilities and/or autism spectrum condition.

The BCBC Statutory Independent Professional Advocacy contract funds were used to provide crisis/intervention advocacy services to people with learning disabilities and/or autism spectrum condition.

The Covid-19 Recovery Grant was used to support learning disability advocacy services.

The breakdown of grant income received during the year is as follows:

	£
BCBC SLA Grant	54,400
BCBC SIPA Contract	21,600
	<u>76,000</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	61,967	7,160	69,127
	<u>61,967</u>	<u>7,160</u>	<u>69,127</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2023 nor for the year ended 31 March 2022.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2023 nor for the year ended 31 March 2022.

5. STAFF COSTS

	2023 £	2022 £
Wages and salaries	46,519	66,948
Other pension costs	891	2,879
	<u>47,410</u>	<u>69,827</u>

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

	2023	2022
Direct Charitable Activities	3	5
	<u>3</u>	<u>5</u>

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

The total amount paid to key management personnel in the financial year was £30,013.

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	1,000	-	1,000
Charitable activities			
Supporting people with learning disability	1,055	104,000	105,055
Total	<u>2,055</u>	<u>104,000</u>	<u>106,055</u>
EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	6,359	93,470	99,829
NET INCOME/(EXPENDITURE)	(4,304)	10,530	6,226
RECONCILIATION OF FUNDS			
Total funds brought forward	16,577	4,911	21,488
TOTAL FUNDS CARRIED FORWARD	<u>12,273</u>	<u>15,441</u>	<u>27,714</u>

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £1,730.

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2022	1,405	32,457	33,862
Additions	-	1,233	1,233
At 31 March 2023	<u>1,405</u>	<u>33,690</u>	<u>35,095</u>
DEPRECIATION			
At 1 April 2022	1,405	29,341	30,746
Charge for year	-	802	802
At 31 March 2023	<u>1,405</u>	<u>30,143</u>	<u>31,548</u>
NET BOOK VALUE			
At 31 March 2023	<u>-</u>	<u>3,547</u>	<u>3,547</u>
At 31 March 2022	<u>-</u>	<u>3,116</u>	<u>3,116</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Prepayments and accrued income	303	299

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Trade creditors	-	1,722
Other creditors	2,654	2,177
	<u>2,654</u>	<u>3,899</u>

11. MOVEMENT IN FUNDS

	At 1.4.22 £	Net movement in funds £	At 31.3.23 £
Unrestricted funds			
General fund	12,273	1,850	14,123
Restricted funds			
Advocacy	15,441	6,873	22,314
TOTAL FUNDS	<u>27,714</u>	<u>8,723</u>	<u>36,437</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	1,850	-	1,850
Restricted funds			
Advocacy	76,000	(69,127)	6,873
TOTAL FUNDS	<u>77,850</u>	<u>(69,127)</u>	<u>8,723</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

11. MOVEMENT IN FUNDS - continued**Comparatives for movement in funds**

	At 1.4.21 £	Net movement in funds £	At 31.3.22 £
Unrestricted funds			
General fund	16,577	(4,304)	12,273
Restricted funds			
Advocacy	4,911	10,530	15,441
TOTAL FUNDS	<u>21,488</u>	<u>6,226</u>	<u>27,714</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	2,055	(6,359)	(4,304)
Restricted funds			
Advocacy	104,000	(93,470)	10,530
TOTAL FUNDS	<u>106,055</u>	<u>(99,829)</u>	<u>6,226</u>

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

	At 1.4.21 £	Net movement in funds £	At 31.3.23 £
Unrestricted funds			
General fund	16,577	(2,454)	14,123
Restricted funds			
Advocacy	4,911	17,403	22,314
TOTAL FUNDS	<u>21,488</u>	<u>14,949</u>	<u>36,437</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2023

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	3,905	(6,359)	(2,454)
Restricted funds			
Advocacy	180,000	(162,597)	17,403
TOTAL FUNDS	<u>183,905</u>	<u>(168,956)</u>	<u>14,949</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

In the financial year, £592 (2022: £4,662) was paid to former manager and trustee of People First Bridgend, Katrina Kurowski. The full amount was in relation to sessional fees.

An amount of £1,700 was donated to the charity by a trustee.

PEOPLE FIRST BRIDGEND

England & Wales - Charity number 1166485

Accounts

People First Bridgend

Charitable Incorporated Organisation No.: 11-66-485

Trustees' Annual Report for the period 2021-2022

Starting 1st April 2021 ending 31st March 2022

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	1. To relieve and support people who have a learning disability and/or with autistic spectrum disorder (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens. 2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society. 3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning. 4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.
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.	Para 1.17 and 1.19	People First Bridgend (PFB) is an independent advocacy provider that supports people with a learning disability and/or with autism to express their voice and choices in relation to social services, to engage in their local community and to maintain their own independence as far as possible.

		Its main activities are divided between statutory and non-statutory advocacy services. PFB provides statutory advocacy through a contract with Bridgend County Borough Council (BCBC) to provide learning disability-specialist Independent Professional Advocacy, as required by the Social Services and Well-being (Wales) Act 2014. This service supports people with learning disabilities to understand and make choices about their care and support whilst in receipt of statutory services or processes, such as social services assessments. PFB provided non-statutory advocacy through a separate service level agreement with BCBC. Under this, it provides a range of services, such as self-advocacy and peer-support groups, disability awareness training for public and professionals, translation of documents into Easy Read, and other ad-hoc activities that promote self-advocacy skills, participation and representation and co-production. The service level agreement also funds the core costs of the organisation, such as management, administration, and office facilities.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A

Contribution made by volunteers	Para 1.38	Whilst PFB does not regularly utilise volunteers, its trusteeship has been extremely active in keeping the charity running during a challenging period. This included going above and beyond normal governance-related duties to ensure that PFB could deliver its services.
Other		

Achievements and Performance

	SORP reference	
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.	Para 1.20	Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council. The end of 2021-22 saw the gradual lifting of COVID-19 pandemic measures, which meant a full return to face-to-face advocacy, and the start of the organisation's recovery and adaption to a post-pandemic environment. PFB received an additional £9,000 in COVID-19 recovery funds from Bridgend County Borough Council (BCBC) to support it to overcome the post-pandemic challenges. Below is a breakdown of how the services performed throughout the year. Statutory Independent Professional Advocacy We continued to deliver our IPA service to adults with LDs eligible under the Social Services and Well-being (Wales) Act 2014. We took 19 new referrals during the year. We worked with 73 clients overall on 228 advocacy issues. On the year end, we had closed 26 clients. The pandemic situation stopped our advocate being able to meet clients face-to-face, so we moved to virtual where possible. As conditions improved, we were able to transition back to face-to-face with PPE. Examples of advocacy issues include: - Assessment, care and support planning and reviews - Safeguarding - Accessing information, advice and assistance - Accommodation issues - Concern, dissatisfaction and complaints - Change of service type - Sale of property - Prison Non-Statutory Independent Advocacy We took 12 new referrals during the year. We worked with 17 clients overall on 41 advocacy issues. On year end, we had closed 8 clients to the service. As with statutory IPA service, our advocate continued to work under pandemic conditions. Examples of advocacy issues include: - Accessing information, advice and guidance - Accommodation issues

		- Support to liaise with professionals - Finance issues - Legal processes - Making information accessible The Advisory Team We continued to run our self-advocacy group for adults with learning disabilities, holding 39 meetings with 17 members over the year. We did these mostly through virtual means as the pandemic was still underway for most of the year. We had guests from UCL, Cwm Taf People First, our Regional Partnership Board and various other collaborators. We did various consultations with our members about the effects of the pandemic, and what they want the future to look like post-pandemic. Bridgend Spectrum Social/Support Group (BSSG) Our BSSG had 15 meetings with 20 members. All sessions had to be delivered virtually due to the pandemic. The group experimented with new formats for the social element, including meeting via Discord for gaming and movie evenings. In addition to meetings, our BSSG facilitator gave ad hoc support to members as and when needed. We delivered 9 sessions with 21 trainees. Training topics included: - Virtual medical student training - Virtual Diversity Matters, Inclusion Wins for South Wales Police Sub-projects In addition to our usual service work, we took part in 14 sub-projects and attended 20 events and meetings. Some of these included: BCBC - Supported Living Accommodation Consultation PFB carried out a consultation with tenants in commissioned supported living accommodation. 114 tenants were interviewed and had person-centred stories written about them, which were used during service re-commissioning. This exercise was used as an example of good practice throughout the region. BCBC - LD Service Development Plan BCBC initiated a programme to develop areas of LD services. PFB was invited to advocate for adults with LDs and guide the stakeholders on principles that should be followed throughout. This included joint facilitation of an away day
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		with 30 stakeholders, including support for 6 self-advocates with LDs. Other collaborative projects which took place during 2021-22: - University College London/Mencap Digital Project STORM (Standing up for myself) Self-Advocacy Training Pilot - Cardiff and Vale University Health Board - Film about Communication - BCBC - Extended Manager's Meeting presentation - BCBC - Focus Group for Social Services Corporate Director - BCBC - Easy Read translation for Social Services (4 Documents) - BCBC - Budget Consultation Event - South Wales Police - Diversity Matters, Inclusion Wins Training - Cwm Taf People First - My Day, My Way (LD Priorities) - Cwm Taf People First - What Matters to Me Now Roadshow (LD Priorities) - Cwm Taf People First - Hack-a-thon (LD Priorities) - Cwm Taf Morgannwg Regional Partnership Board - Population Needs Assessment - Cwm Taf Morgannwg Regional Partnership Board - LD Steering Group
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N/A
Performance of fundraising activities against objectives set	Para 1.41	N/A
Investment performance against objectives	Para 1.41	N/A

Other		2021-2022 saw the pandemic restrictions ease and activities return to a relative normal. This transition period proved to be challenging for PFB. Two key staff members left PFB at the end of the financial year; two more announced their intention to leave following the year end. Additionally, a key staff member was off work during Q4 of the financial year, which saw the chair of the trustees take over operational duties. PFB managed to maintain stability, but its ability to perform its services was affected.
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Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The trustees have sufficient resources through PFB's current funding to continue into the immediate future.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	"Reserves" are that part of the People First Bridgend's funds not subject to commitments, planned expenditure or other restrictions. People First Bridgend will match reserves to its requirements and no more. The Trustees aim to maintain reserves at a level that is at least equivalent to three months' operational expenditure.
Amount of reserves held	Para 1.22	12,273
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	PFB faces several uncertainties: 1. The impact of increased energy prices, cost-of-living and inflation on its primary funding sources. 2. The impact of increased energy prices, cost-of-living and inflation on its viability to continue with current resources. 3. Being unsuccessful in recruiting a new Operations Manager, and consequently not being able to recruit other key staff vacancies until the post is filled. 4. Being unable to meet existing contract terms and conditions due to point 3.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	People First Bridgend has held a Service Level Agreement with Bridgend County Borough Council for the past 25 years which provides core funding. People First Bridgend also has a separate contract with BCBC to provide Statutory Independent Professional Advocacy.

Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	Additional to the uncertainties above, PFB relies exclusively on local authority funding for income. This means that any change to local authority budgets potentially impacts PFB's ability to carry out its activities. The risk that local authority budgets will be cut is highly likely given the challenges that the UK economy faces. Historically, PFB has been unscathed, having only faced one budget cut in the past decade. However, reliance on one funding source has limited PFB's ability to set higher budgets in times of inflation. As a result, PFB has found it challenging to keep wages in-line with inflation, which has caused difficulties recruiting.
Other		N/A

Structure, Governance and Management

Description of charity's trusts:		N/A
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	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	Para 1.25	Trustees are selected in line with the Section 9 and 10 of the constitution: • Are over 18 • Have the skills, knowledge and experience needed for the effective administration of the CIO • Are invited to attend a meeting • Are approved by the trustees at an executive meeting

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include: • Trustee Code of Conduct • Values Statement • Conflict of Interests Policy • Training and Development Policy Trustees are also issued with a portfolio of information including the constitution, annual report, management accounts, charity commission guidance.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	Organisational Structure Executive Committee: • 5 Trustees Staff Team: • Operational Manager • Independent Professional Advocate x 2 • Self-advocacy Facilitator • Advocacy Coordinator • BSSG Facilitator

		People First Bridgend also has an Advisory Team made up of 5 beneficiaries which are consulted in matters of change and direction. This allows the organisation to be user-led without its potentially vulnerable beneficiary group being exposed to the legal responsibilities of being a trustee. People First Bridgend is part of the wider People First movement, with which it maintains networking links. Its national counterpart All Wales People First act as a conduit between local, regional and national matters. All Wales People First are a separate entity and have no authority over PFB.
Relationship with any related parties	Para 1.51	N/A
Other		N/A

Reference and Administrative details

Charity name	People First Bridgend
Other name the charity uses	Previously known as “Bridgend People First”
Registered charity number	1166485
Charity’s principal address	Office 32 Apollo Business Village Heol Persondy Aberkenfig Bridgend CF32 9RF

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	Jean Gregson	Chair		Board of Trustees
2	Heather Williams	N/A		Board of Trustees
3	Elaine Williams	N/A		Board of Trustees
4	Alun Phillips	N/A		Board of Trustees
5	Mike Harris	N/A		Board of Trustees
6	Judith Pickard	N/A	Resigned on 30/09/2022	Board of Trustees
7	Alys Jenkins	N/A	Resigned on 21/09/2022	Board of Trustees

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity’s objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity’s own assets	N/A

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)	Jean Gregson	Mike Harris
Position (eg Secretary, Chair, etc)	Chair	Trustee

Date 17th January 2023

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2022
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**CONTENTS OF THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2022**

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Balance Sheet	8
Notes to the Financial Statements	9 to 14

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2022**

The trustees present their report with the financial statements of the charity for the year ended 31 March 2022. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

Activities

People First Bridgend (PFB) is a Charitable Incorporated Organisation (CIO) specialising in advocacy for adults with learning disabilities and/or autism to express their voice and choices in relation to statutory services, to engage in their local community and to maintain their own independence as far as possible.

Our main activities are divided between two statutory and non-statutory advocacy services:

PFB is commissioned to provide specialist learning disability/autism independent professional advocacy (IPA) by Bridgend County Borough Council (BCBC), as required by the Social Services and Well-being (Wales) Act 2014. This service supports adults with learning disabilities to understand and make choices about their care and support whilst in receipt of statutory services or processes, such as social services assessments.

PFB provides non-statutory advocacy through a separate service level agreement (SLA) with BCBC. Under this, we provide a range of services including self-advocacy and peer-support groups, non-statutory independent advocacy, disability awareness training for public and professionals, translation of documents into Easy Read, and other ad-hoc activities that promote self-advocacy skills, participation and representation and co-production. The SLA also funds the core costs of the organisation, such as management, administration, and office facilities.

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

ACHIEVEMENT AND PERFORMANCE

Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council.

The end of 2021-22 saw the gradual lifting of COVID-19 pandemic measures, which meant a full return to face-to-face advocacy, and the start of the organisation's recovery and adaption to a post-pandemic environment. PFB received an additional £9,000 in COVID-19 recovery funds from Bridgend County Borough Council (BCBC) to support it to overcome the post-pandemic challenges.

Below is a breakdown of how the services performed throughout the year.

Statutory Independent Professional Advocacy

We continued to deliver our IPA service to adults with LDs eligible under the Social Services and Well-being (Wales) Act 2014.

We took **19 new referrals** during the year. We worked with **73 clients overall** on **228 advocacy issues**. On the year end, we had **closed 26 clients**.

The pandemic situation stopped our advocate being able to meet clients face-to-face, so we moved to virtual where possible. As conditions improved, we were able to transition back to face-to-face with PPE. Examples of advocacy issues include:

- Assessment, care and support planning and reviews
- Safeguarding
- Accessing information, advice and assistance
- Accommodation issues
- Concern, dissatisfaction and complaints
- Change of service type
- Sale of property
- Prison

Non-Statutory Independent Advocacy

We took **12 new referrals** during the year. We worked with **17 clients overall** on **41 advocacy issues**. On year end, we had **closed 8 clients** to the service.

As with statutory IPA service, our advocate continued to work under pandemic conditions. Examples of advocacy issues include:

- Accessing information, advice and guidance
- Accommodation issues
- Support to liaise with professionals
- Finance issues
- Legal processes
- Making information accessible

The Advisory Team

We continued to run our self-advocacy group for adults with learning disabilities, holding **39 meetings** with **17 members** over the year. We did these mostly through virtual means as the pandemic was still underway for most of the year. We had guests from UCL, Cwm Taf People First, our Regional Partnership Board and various other collaborators. We did various consultations with our members about the effects of the pandemic, and what they want the future to look like post-pandemic.

Bridgend Spectrum Social/Support Group (BSSG)

Our BSSG had **15 meetings** with **20 members**. All sessions had to be delivered virtually due to the pandemic. The group experimented with new formats for the social element, including meeting via Discord for gaming and movie evenings. In addition to meetings, our BSSG facilitator gave ad hoc support to members as and when needed.

Training

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

We delivered **9 sessions** with **21 trainees**. Training topics included:

- Virtual medical student training
- Virtual Diversity Matters, Inclusion Wins for South Wales Police

Sub-projects

In addition to our usual service work, we took part in **14 sub-projects** and attended **20 events and meetings**. Some of these included:

BCBC - Supported Living Accommodation Consultation

PFB carried out a consultation with tenants in commissioned supported living accommodation. **114 tenants** were interviewed and had person-centred stories written about them, which were used during service re-commissioning. This exercise was used as an example of good practice throughout the region.

BCBC - LD Service Development Plan

BCBC initiated a programme to develop areas of LD services. PFB was invited to advocate for adults with LDs and guide the stakeholders on principles that should be followed throughout. This included joint facilitation of an away day with 30 stakeholders, including support for 6 self-advocates with LDs.

Other collaborative projects which took place during 2021-22:

- University College London/Mencap - Digital Project STORM (Standing up for myself) Self-Advocacy Training Pilot
- Cardiff and Vale University Health Board - Film about Communication
- BCBC - Extended Manager's Meeting presentation
- BCBC - Focus Group for Social Services Corporate Director
- BCBC - Easy Read translation for Social Services (4 Documents)
- BCBC - Budget Consultation Event
- South Wales Police - Diversity Matters, Inclusion Wins Training
- Cwm Taf People First - My Day, My Way (LD Priorities)
- Cwm Taf People First - What Matters to Me Now Roadshow (LD Priorities)
- Cwm Taf People First - Hack-a-thon (LD Priorities)
- Cwm Taf Morgannwg Regional Partnership Board - Population Needs Assessment
- Cwm Taf Morgannwg Regional Partnership Board - LD Steering Group

FINANCIAL REVIEW

Financial position

The Trustees believe the charity has sufficient resources through its current funding to continue into the immediate future.

Principal funding sources

People First Bridgend continued to hold the Peer-support and Skills for Independence SLA, which also covers core costs.

It also has a separate contract to provide Statutory Independent Professional Advocacy.

Both are funded by Bridgend County Borough Council Social Services.

Additionally, People First Bridgend was given COVID-19 recovery money from the council, to give it extra capacity deal with issues related to the pandemic.

Reserves policy

"Reserves" are that part of the People First Bridgend's funds not subject to commitments, planned expenditure or other restrictions.

People First Bridgend will match reserves to its requirements and no more.

The Trustees aim to maintain reserves at a level that is at least equivalent to three months' operational expenditure.

FINANCIAL REVIEW

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

COVID-19

For most of the report period, there was a protracted pandemic lockdown. Welsh Government put various measures in-place to control the spread of COVID-19, including lockdowns, social distancing and PPE.

This affected the charity's ability to carry out its service because of restrictions around face-to-face work and staff illness related to the pandemic lockdown.

People First Bridgend used a mixture of virtual and face-to-face formats to carry out its activities.

War in Ukraine

In February 2022, Russia began a full-scale invasion and war in Ukraine. In response, the West began rapidly equipping Ukraine with arms and put economic sanctions on Russia. Russia's actions have made the UK increase defence budgets, and because of economic warfare the cost of living, fuel and energy has rapidly increased. The Bank of England predict an economic recession in Q4 of 2022-23.

This economic climate poses a threat to PFB as running costs and costs of living for its staff increase. Local authority budgets may be stretched even further to cope with the societal impact, which could impact PFB's budget during 2022-23.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

People First Bridgend is a Charitable Incorporated Organisation.

Recruitment and appointment of new trustees

Appointed for a term of 3 years, after the initial trustees appointed to set up the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are selected in line with the Section 9 and 10 of the constitution:

- Are over 18
- Have the skills, knowledge and experience needed for the effective administration of the CIO
- Are invited to attend a meeting
- Are approved by the trustees at an executive meeting

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy

Trustees are also issued with a portfolio of information including the constitution, annual report, management accounts, charity commission guidance.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Executive Committee:

- 7 Trustees

Staff Team:

- Operational Manager
- Independent Professional Advocate
- Non-statutory Independent Advocate
- Training and Development Worker
- BSSG Facilitator

People First Bridgend also has an Advisory Team made up of 10 beneficiaries which are consulted in matters of change and direction. This allows the organisation to be user-led without its potentially vulnerable beneficiary group being exposed to the legal responsibilities of being a trustee.

People First Bridgend is part of the wider People First movement, with which it maintains networking links. In particular, its national counterpart All Wales People First who act as a conduit between local, regional and national matters.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 28 and 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Judith Pickard
Jean Gregson
Heather Williams
Alun Phillips
Elaine Williams
Michael John Harris
Alys Elizabeth Byrne

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Approved by order of the board of trustees on 22/09/2022 and signed on its behalf by:



.....
Judith Anne Pickard - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2022.

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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA
Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Date:

PEOPLE FIRST BRIDGEND

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2022**

	Notes	Unrestricted fund £	Restricted fund £	2022 Total funds £	2021 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		1,000	-	1,000	-
Charitable activities					
Supporting people with learning disability		1,055	104,000	105,055	102,134
Total		<u>2,055</u>	<u>104,000</u>	<u>106,055</u>	<u>102,134</u>
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		6,359	93,470	99,829	101,260
NET INCOME/(EXPENDITURE)		<u>(4,304)</u>	<u>10,530</u>	<u>6,226</u>	<u>874</u>
RECONCILIATION OF FUNDS					
Total funds brought forward		16,577	4,911	21,488	20,614
TOTAL FUNDS CARRIED FORWARD		<u><u>12,273</u></u>	<u><u>15,441</u></u>	<u><u>27,714</u></u>	<u><u>21,488</u></u>

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

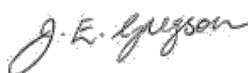
**BALANCE SHEET
31 MARCH 2022**

	Notes	Unrestricted fund £	Restricted fund £	2022 Total funds £	2021 Total funds £
FIXED ASSETS					
Tangible assets	8	-	3,116	3,116	4,064
CURRENT ASSETS					
Debtors	9	-	299	299	238
Cash at bank		12,273	15,925	28,198	20,275
		<u>12,273</u>	<u>16,224</u>	<u>28,497</u>	<u>20,513</u>
CREDITORS					
Amounts falling due within one year	10	-	(3,899)	(3,899)	(3,089)
		<u>12,273</u>	<u>12,325</u>	<u>24,598</u>	<u>17,424</u>
NET CURRENT ASSETS					
		<u>12,273</u>	<u>15,441</u>	<u>27,714</u>	<u>21,488</u>
TOTAL ASSETS LESS CURRENT LIABILITIES					
		<u>12,273</u>	<u>15,441</u>	<u>27,714</u>	<u>21,488</u>
NET ASSETS					
		<u>12,273</u>	<u>15,441</u>	<u>27,714</u>	<u>21,488</u>
FUNDS	11				
Unrestricted funds				12,273	16,577
Restricted funds				15,441	4,911
TOTAL FUNDS				<u>27,714</u>	<u>21,488</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 22/09/2022..... and were signed on its behalf by:



.....
Judith Anne Pickard - Trustee



.....
Jean Gregson - Trustee

The notes form part of these financial statements

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2022

2. INCOME FROM CHARITABLE ACTIVITIES

The BCBC Peer-support and Skills for Independence SLA grant was used to provide preventative advocacy-related services to people with learning disabilities and/or autism spectrum condition.

The BCBC Statutory Independent Professional Advocacy contract funds were used to provide crisis/intervention advocacy services to people with learning disabilities and/or autism spectrum condition.

The Covid-19 Recovery Grant was used to support learning disability advocacy services.

The breakdown of grant income received during the year is as follows:

	£
BCBC SLA Grant	68,000
BCBC SIPA Contract	27,000
Covid-19 Recovery Grant	9,000
	<u>104,000</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>83,160</u>	<u>16,669</u>	<u>99,829</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2022 nor for the year ended 31 March 2021.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2022 nor for the year ended 31 March 2021.

5. STAFF COSTS

	2022 £	2021 £
Wages and salaries	66,948	63,232
Other pension costs	<u>2,879</u>	<u>2,431</u>
	<u>69,827</u>	<u>65,663</u>

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

	2022	2021
Direct Charitable Activities	<u>5</u>	<u>5</u>

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

The total amount paid to key management personnel in the financial year was £27,415.

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Charitable activities			
Supporting people with learning disability	5,251	96,883	102,134
EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	8,455	92,805	101,260
NET INCOME/(EXPENDITURE)	(3,204)	4,078	874
RECONCILIATION OF FUNDS			
Total funds brought forward	19,781	833	20,614
TOTAL FUNDS CARRIED FORWARD	16,577	4,911	21,488

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £1,730.

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2021 and 31 March 2022	1,405	32,457	33,862
DEPRECIATION			
At 1 April 2021	1,405	28,393	29,798
Charge for year	-	948	948
At 31 March 2022	1,405	29,341	30,746
NET BOOK VALUE			
At 31 March 2022	-	3,116	3,116
At 31 March 2021	-	4,064	4,064

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2022**9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	2022	2021
	£	£
Prepayments and accrued income	299	238

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2022	2021
	£	£
Trade creditors	1,722	-
Other creditors	2,177	3,089
	3,899	3,089

11. MOVEMENT IN FUNDS

	At 1.4.21	Net movement in funds	At 31.3.22
	£	£	£
Unrestricted funds			
General fund	16,577	(4,304)	12,273
Restricted funds			
Advocacy	4,911	10,530	15,441
TOTAL FUNDS	21,488	6,226	27,714

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
Unrestricted funds			
General fund	2,055	(6,359)	(4,304)
Restricted funds			
Advocacy	104,000	(93,470)	10,530
TOTAL FUNDS	106,055	(99,829)	6,226

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2022

11. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1.4.20 £	Net movement in funds £	At 31.3.21 £
Unrestricted funds			
General fund	19,781	(3,204)	16,577
Restricted funds			
Advocacy	833	4,078	4,911
TOTAL FUNDS	<u>20,614</u>	<u>874</u>	<u>21,488</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	5,251	(8,455)	(3,204)
Restricted funds			
Advocacy	96,883	(92,805)	4,078
TOTAL FUNDS	<u>102,134</u>	<u>(101,260)</u>	<u>874</u>

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

	At 1.4.20 £	Net movement in funds £	At 31.3.22 £
Unrestricted funds			
General fund	19,781	(7,508)	12,273
Restricted funds			
Advocacy	833	14,608	15,441
TOTAL FUNDS	<u>20,614</u>	<u>7,100</u>	<u>27,714</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2022

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	7,306	(14,814)	(7,508)
Restricted funds			
Advocacy	200,883	(186,275)	14,608
TOTAL FUNDS	<u>208,189</u>	<u>(201,089)</u>	<u>7,100</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

In the financial year, £4,662 (2021: £1,548) was paid to former manager and trustee of People First Bridgend, Katrina Kurowski. The full amount was in relation to consultancy work on a project for Bridgend County Council carried out on behalf of People First Bridgend.

In addition, a payment of £1,722 was made to trustee Jean Gregory in respect of management fees.

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2022
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**CONTENTS OF THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2022**

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Independent Examiner's Report	6
Statement of Financial Activities	7
Balance Sheet	8
Notes to the Financial Statements	9 to 14

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2022**

The trustees present their report with the financial statements of the charity for the year ended 31 March 2022. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

Activities

People First Bridgend (PFB) is a Charitable Incorporated Organisation (CIO) specialising in advocacy for adults with learning disabilities and/or autism to express their voice and choices in relation to statutory services, to engage in their local community and to maintain their own independence as far as possible.

Our main activities are divided between two statutory and non-statutory advocacy services:

PFB is commissioned to provide specialist learning disability/autism independent professional advocacy (IPA) by Bridgend County Borough Council (BCBC), as required by the Social Services and Well-being (Wales) Act 2014. This service supports adults with learning disabilities to understand and make choices about their care and support whilst in receipt of statutory services or processes, such as social services assessments.

PFB provides non-statutory advocacy through a separate service level agreement (SLA) with BCBC. Under this, we provide a range of services including self-advocacy and peer-support groups, non-statutory independent advocacy, disability awareness training for public and professionals, translation of documents into Easy Read, and other ad-hoc activities that promote self-advocacy skills, participation and representation and co-production. The SLA also funds the core costs of the organisation, such as management, administration, and office facilities.

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

ACHIEVEMENT AND PERFORMANCE

Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council.

The end of 2021-22 saw the gradual lifting of COVID-19 pandemic measures, which meant a full return to face-to-face advocacy, and the start of the organisation's recovery and adaption to a post-pandemic environment. PFB received an additional £9,000 in COVID-19 recovery funds from Bridgend County Borough Council (BCBC) to support it to overcome the post-pandemic challenges.

Below is a breakdown of how the services performed throughout the year.

Statutory Independent Professional Advocacy

We continued to deliver our IPA service to adults with LDs eligible under the Social Services and Well-being (Wales) Act 2014.

We took **19 new referrals** during the year. We worked with **73 clients overall** on **228 advocacy issues**. On the year end, we had **closed 26 clients**.

The pandemic situation stopped our advocate being able to meet clients face-to-face, so we moved to virtual where possible. As conditions improved, we were able to transition back to face-to-face with PPE. Examples of advocacy issues include:

- Assessment, care and support planning and reviews
- Safeguarding
- Accessing information, advice and assistance
- Accommodation issues
- Concern, dissatisfaction and complaints
- Change of service type
- Sale of property
- Prison

Non-Statutory Independent Advocacy

We took **12 new referrals** during the year. We worked with **17 clients overall** on **41 advocacy issues**. On year end, we had **closed 8 clients** to the service.

As with statutory IPA service, our advocate continued to work under pandemic conditions. Examples of advocacy issues include:

- Accessing information, advice and guidance
- Accommodation issues
- Support to liaise with professionals
- Finance issues
- Legal processes
- Making information accessible

The Advisory Team

We continued to run our self-advocacy group for adults with learning disabilities, holding **39 meetings** with **17 members** over the year. We did these mostly through virtual means as the pandemic was still underway for most of the year. We had guests from UCL, Cwm Taf People First, our Regional Partnership Board and various other collaborators. We did various consultations with our members about the effects of the pandemic, and what they want the future to look like post-pandemic.

Bridgend Spectrum Social/Support Group (BSSG)

Our BSSG had **15 meetings** with **20 members**. All sessions had to be delivered virtually due to the pandemic. The group experimented with new formats for the social element, including meeting via Discord for gaming and movie evenings. In addition to meetings, our BSSG facilitator gave ad hoc support to members as and when needed.

Training

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

We delivered **9 sessions** with **21 trainees**. Training topics included:

- Virtual medical student training
- Virtual Diversity Matters, Inclusion Wins for South Wales Police

Sub-projects

In addition to our usual service work, we took part in **14 sub-projects** and attended **20 events and meetings**. Some of these included:

BCBC - Supported Living Accommodation Consultation

PFB carried out a consultation with tenants in commissioned supported living accommodation. **114 tenants** were interviewed and had person-centred stories written about them, which were used during service re-commissioning. This exercise was used as an example of good practice throughout the region.

BCBC - LD Service Development Plan

BCBC initiated a programme to develop areas of LD services. PFB was invited to advocate for adults with LDs and guide the stakeholders on principles that should be followed throughout. This included joint facilitation of an away day with 30 stakeholders, including support for 6 self-advocates with LDs.

Other collaborative projects which took place during 2021-22:

- University College London/Mencap - Digital Project STORM (Standing up for myself) Self-Advocacy Training Pilot
- Cardiff and Vale University Health Board - Film about Communication
- BCBC - Extended Manager's Meeting presentation
- BCBC - Focus Group for Social Services Corporate Director
- BCBC - Easy Read translation for Social Services (4 Documents)
- BCBC - Budget Consultation Event
- South Wales Police - Diversity Matters, Inclusion Wins Training
- Cwm Taf People First - My Day, My Way (LD Priorities)
- Cwm Taf People First - What Matters to Me Now Roadshow (LD Priorities)
- Cwm Taf People First - Hack-a-thon (LD Priorities)
- Cwm Taf Morgannwg Regional Partnership Board - Population Needs Assessment
- Cwm Taf Morgannwg Regional Partnership Board - LD Steering Group

FINANCIAL REVIEW

Financial position

The Trustees believe the charity has sufficient resources through its current funding to continue into the immediate future.

Principal funding sources

People First Bridgend continued to hold the Peer-support and Skills for Independence SLA, which also covers core costs.

It also has a separate contract to provide Statutory Independent Professional Advocacy.

Both are funded by Bridgend County Borough Council Social Services.

Additionally, People First Bridgend was given COVID-19 recovery money from the council, to give it extra capacity deal with issues related to the pandemic.

Reserves policy

"Reserves" are that part of the People First Bridgend's funds not subject to commitments, planned expenditure or other restrictions.

People First Bridgend will match reserves to its requirements and no more.

The Trustees aim to maintain reserves at a level that is at least equivalent to three months' operational expenditure.

FINANCIAL REVIEW

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

COVID-19

For most of the report period, there was a protracted pandemic lockdown. Welsh Government put various measures in-place to control the spread of COVID-19, including lockdowns, social distancing and PPE.

This affected the charity's ability to carry out its service because of restrictions around face-to-face work and staff illness related to the pandemic lockdown.

People First Bridgend used a mixture of virtual and face-to-face formats to carry out its activities.

War in Ukraine

In February 2022, Russia began a full-scale invasion and war in Ukraine. In response, the West began rapidly equipping Ukraine with arms and put economic sanctions on Russia. Russia's actions have made the UK increase defence budgets, and because of economic warfare the cost of living, fuel and energy has rapidly increased. The Bank of England predict an economic recession in Q4 of 2022-23.

This economic climate poses a threat to PFB as running costs and costs of living for its staff increase. Local authority budgets may be stretched even further to cope with the societal impact, which could impact PFB's budget during 2022-23.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

People First Bridgend is a Charitable Incorporated Organisation.

Recruitment and appointment of new trustees

Appointed for a term of 3 years, after the initial trustees appointed to set up the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are selected in line with the Section 9 and 10 of the constitution:

- Are over 18
- Have the skills, knowledge and experience needed for the effective administration of the CIO
- Are invited to attend a meeting
- Are approved by the trustees at an executive meeting

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy

Trustees are also issued with a portfolio of information including the constitution, annual report, management accounts, charity commission guidance.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2022

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Executive Committee:

- 7 Trustees

Staff Team:

- Operational Manager
- Independent Professional Advocate
- Non-statutory Independent Advocate
- Training and Development Worker
- BSSG Facilitator

People First Bridgend also has an Advisory Team made up of 10 beneficiaries which are consulted in matters of change and direction. This allows the organisation to be user-led without its potentially vulnerable beneficiary group being exposed to the legal responsibilities of being a trustee.

People First Bridgend is part of the wider People First movement, with which it maintains networking links. In particular, its national counterpart All Wales People First who act as a conduit between local, regional and national matters.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 28 and 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Judith Pickard
Jean Gregson
Heather Williams
Alun Phillips
Elaine Williams
Michael John Harris
Alys Elizabeth Byrne

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Approved by order of the board of trustees on 22/09/2022 and signed on its behalf by:



Judith Anne Pickard - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2022.

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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA
Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Date:

PEOPLE FIRST BRIDGEND

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2022**

	Notes	Unrestricted fund £	Restricted fund £	2022 Total funds £	2021 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		1,000	-	1,000	-
Charitable activities					
Supporting people with learning disability		1,055	104,000	105,055	102,134
Total		<u>2,055</u>	<u>104,000</u>	<u>106,055</u>	<u>102,134</u>
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		6,359	93,470	99,829	101,260
NET INCOME/(EXPENDITURE)		<u>(4,304)</u>	<u>10,530</u>	<u>6,226</u>	<u>874</u>
RECONCILIATION OF FUNDS					
Total funds brought forward		16,577	4,911	21,488	20,614
TOTAL FUNDS CARRIED FORWARD		<u><u>12,273</u></u>	<u><u>15,441</u></u>	<u><u>27,714</u></u>	<u><u>21,488</u></u>

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

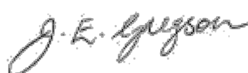
**BALANCE SHEET
31 MARCH 2022**

	Notes	Unrestricted fund £	Restricted fund £	2022 Total funds £	2021 Total funds £
FIXED ASSETS					
Tangible assets	8	-	3,116	3,116	4,064
CURRENT ASSETS					
Debtors	9	-	299	299	238
Cash at bank		12,273	15,925	28,198	20,275
		<u>12,273</u>	<u>16,224</u>	<u>28,497</u>	<u>20,513</u>
CREDITORS					
Amounts falling due within one year	10	-	(3,899)	(3,899)	(3,089)
		<u>12,273</u>	<u>12,325</u>	<u>24,598</u>	<u>17,424</u>
NET CURRENT ASSETS					
		<u>12,273</u>	<u>15,441</u>	<u>27,714</u>	<u>21,488</u>
TOTAL ASSETS LESS CURRENT LIABILITIES					
		<u>12,273</u>	<u>15,441</u>	<u>27,714</u>	<u>21,488</u>
NET ASSETS					
		<u>12,273</u>	<u>15,441</u>	<u>27,714</u>	<u>21,488</u>
FUNDS	11				
Unrestricted funds				12,273	16,577
Restricted funds				15,441	4,911
TOTAL FUNDS				<u>27,714</u>	<u>21,488</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 22/09/2022..... and were signed on its behalf by:



.....
Judith Anne Pickard - Trustee



.....
Jean Gregson - Trustee

The notes form part of these financial statements

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2022
2. INCOME FROM CHARITABLE ACTIVITIES

The BCBC Peer-support and Skills for Independence SLA grant was used to provide preventative advocacy-related services to people with learning disabilities and/or autism spectrum condition.

The BCBC Statutory Independent Professional Advocacy contract funds were used to provide crisis/intervention advocacy services to people with learning disabilities and/or autism spectrum condition.

The Covid-19 Recovery Grant was used to support learning disability advocacy services.

The breakdown of grant income received during the year is as follows:

	£
BCBC SLA Grant	68,000
BCBC SIPA Contract	27,000
Covid-19 Recovery Grant	9,000
	<u>104,000</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>83,160</u>	<u>16,669</u>	<u>99,829</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2022 nor for the year ended 31 March 2021.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2022 nor for the year ended 31 March 2021.

5. STAFF COSTS

	2022 £	2021 £
Wages and salaries	66,948	63,232
Other pension costs	<u>2,879</u>	<u>2,431</u>
	<u>69,827</u>	<u>65,663</u>

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

	2022	2021
Direct Charitable Activities	<u>5</u>	<u>5</u>

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

The total amount paid to key management personnel in the financial year was £27,415.

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Charitable activities			
Supporting people with learning disability	5,251	96,883	102,134
EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	8,455	92,805	101,260
NET INCOME/(EXPENDITURE)	(3,204)	4,078	874
RECONCILIATION OF FUNDS			
Total funds brought forward	19,781	833	20,614
TOTAL FUNDS CARRIED FORWARD	16,577	4,911	21,488

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £1,730.

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2021 and 31 March 2022	1,405	32,457	33,862
DEPRECIATION			
At 1 April 2021	1,405	28,393	29,798
Charge for year	-	948	948
At 31 March 2022	1,405	29,341	30,746
NET BOOK VALUE			
At 31 March 2022	-	3,116	3,116
At 31 March 2021	-	4,064	4,064

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2022**9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	2022	2021
	£	£
Prepayments and accrued income	299	238

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2022	2021
	£	£
Trade creditors	1,722	-
Other creditors	2,177	3,089
	3,899	3,089

11. MOVEMENT IN FUNDS

	At 1.4.21	Net movement in funds	At 31.3.22
	£	£	£
Unrestricted funds			
General fund	16,577	(4,304)	12,273
Restricted funds			
Advocacy	4,911	10,530	15,441
TOTAL FUNDS	21,488	6,226	27,714

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
Unrestricted funds			
General fund	2,055	(6,359)	(4,304)
Restricted funds			
Advocacy	104,000	(93,470)	10,530
TOTAL FUNDS	106,055	(99,829)	6,226

11. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

	At 1.4.20 £	Net movement in funds £	At 31.3.21 £
Unrestricted funds			
General fund	19,781	(3,204)	16,577
Restricted funds			
Advocacy	833	4,078	4,911
TOTAL FUNDS	<u>20,614</u>	<u>874</u>	<u>21,488</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	5,251	(8,455)	(3,204)
Restricted funds			
Advocacy	96,883	(92,805)	4,078
TOTAL FUNDS	<u>102,134</u>	<u>(101,260)</u>	<u>874</u>

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

	At 1.4.20 £	Net movement in funds £	At 31.3.22 £
Unrestricted funds			
General fund	19,781	(7,508)	12,273
Restricted funds			
Advocacy	833	14,608	15,441
TOTAL FUNDS	<u>20,614</u>	<u>7,100</u>	<u>27,714</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2022

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	7,306	(14,814)	(7,508)
Restricted funds			
Advocacy	200,883	(186,275)	14,608
TOTAL FUNDS	<u>208,189</u>	<u>(201,089)</u>	<u>7,100</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

In the financial year, £4,662 (2021: £1,548) was paid to former manager and trustee of People First Bridgend, Katrina Kurowski. The full amount was in relation to consultancy work on a project for Bridgend County Council carried out on behalf of People First Bridgend.

In addition, a payment of £1,722 was made to trustee Jean Gregory in respect of management fees.

PEOPLE FIRST BRIDGEND

England & Wales - Charity number 1166485

Accounts



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' Annual Report for the period

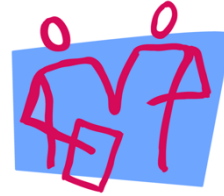
From 1st April 2020

To 31st March 2021

Charity name: People First Bridgend

Charity registration number: 1166485

People First Bridgend
Pobl Yn Gyntaf Pen-Y-Bont



putting people first
rhoi pobl yn gyntaf

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	1. To relieve and support people who have a learning disability and/or with autistic spectrum disorder (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens. 2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society. 3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning. 4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.
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.	Para 1.17 and 1.19	People First Bridgend (PFB) is an independent advocacy provider that supports people with a learning disability and/or with autism to express their voice and choices in relation to social services, to engage in their local community and to maintain their own independence as far as possible. Its main activities are divided between statutory and non-statutory advocacy services. PFB provides statutory advocacy through a contract with Bridgend County Borough Council (BCBC) to provide learning disability-specialist

		Independent Professional Advocacy, as required by the Social Services and Well-being (Wales) Act 2014. This service supports people with learning disabilities to understand and make choices about their care and support whilst in receipt of statutory services or processes, such as social services assessments. PFB provide non-statutory advocacy through a separate service level agreement with BCBC. Under this, it provides a range of services, such as self-advocacy and peer-support groups, disability awareness training for public and professionals, translation of documents into Easy Read, and other ad-hoc activities that promote self-advocacy skills, participation and representation and co-production. The service level agreement also funds the core costs of the organisation, such as management, administration, and office facilities
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	N/A

Achievements and Performance

	SORP reference	
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.	Para 1.20	Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council. The COVID-19 pandemic meant that all face-to-face activities had to stop due to emergency lockdown conditions. The organisation struggled to continue at first, but made adaptations throughout the year that allowed its beneficiaries to remain supported. People First Bridgend acquired money through the Integrated Care Fund to buy tablet PCs for some of its group members. This was to enable them to continue participation in virtual self-advocacy activities, keep in contact with friends and families and access any other activities which helped them maintain positive well-being whilst isolating. Below is a breakdown of how the services performed throughout the year. Statutory Independent Professional Advocacy – BCBC The service received 16 new referrals during the year. They came from the following sources: - BCBC Social Services LD Team - BCBC Social Services LAC Team - Mirus - Parc Prison - Public Service Ombudsman for Wales - Bridgend Voice and Choice Advocacy Hub In total, the service supported 55 unique beneficiaries with 103 advocacy issues. Throughout the year, the service supported people with following advocacy issues: - Assessment, care and support planning and reviews - Safeguarding - Accessing information, advice and assistance - Accommodation issues - Concern, dissatisfaction and complaints - Change of service type or preparing to leave hospital and return to the community - Preparing to leave prison - Legal - Court of Protection Investigation - Family conflicts of interest

		- Prison Transgender Case Board Review 17 beneficiaries and 22 advocacy issues were closed. The service made a total of 9 signpostings to the following organisations: - Tros Gynol Plant - Mental Health Matters Wales - Advocacy Support Cymru - Advocacy Matters Wales - PFB Non-statutory Advocacy Service - Cardiff and Vale Advocacy Gateway - BAVO Community Navigators - Christians Against Poverty Peer-support and Skills for Independence SLA – BCBC The Non-statutory Independent Advocacy Service received 11 new referrals. In total, the service supported 25 beneficiaries with 41 advocacy issues, which included: The service supported people with the following advocacy issues: - Assessment, Care and Support Planning, Reviews - Accessing Information, Advice and Assistance - Accommodation - Concern, Dissatisfaction, Complaints - Benefits Application, Challenges, Tribunal Process - Care and Legal Proceedings - Social Isolation and promoting well-being - Contacting officialdom and related statutory organisations - Safeguarding - Accessing healthcare - Securing financial entitlements - Care proceedings - Integrated Autism Service referrals - PAM assessments - Production of Easy Read minutes for meetings The Skills for Independence Self-advocacy group could not run, due to COVID-19 restrictions and staff capacity. Instead, the organisation developed activity packs that were sent to keep people informed and occupied during lockdown.
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		15 activity packs were developed and sent monthly to 47 unique beneficiaries. In total, 740 activity packs were sent. Activity packs included the following content: - Arts and Crafts Activities - BCBC Budget Consultation - COVID-19 Lockdown Rules/Guidance - Crosswords/Colouring/Puzzles - Emergency Numbers/information - Hate Crime Consultation - Health and Safety/PPE Guidance - Health Eating Recipes - Hospital Traffic Light System Forms - Keep Safe Cymru Registration Forms - Learning Disability Wales Research Questionnaire - Mindfulness Exercises - SBUHB Report on LD Services At the beginning of the pandemic, Advisory Team members were given phone support, but eventually people started to access equipment that allowed them to meet virtually. In total, there were 18 virtual Advisory Team meetings with 16 unique beneficiaries. The following topics were covered during meetings: - Zoom tutorial and practical activities - Coronavirus FAQ - Pandemic Rules and Quiz - BCBC Budget Consultation - Remembrance Day Event - History of Learning Disability and Self-advocacy - SBUHB Service-user Consultation - All Wales People First Hate Crime Consultation - Memorial Service for Advisory Team Member - Memorial Service for All Wales People First Representative Members of the Bridgend Spectrum Social Support Group struggled to adapt to virtual meetings, but the BSSG facilitator setup weekly virtual support groups and gave additional support through social media and ad-hoc phone calls. In total, 56 virtual meetings were run for 10 unique beneficiaries.
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		Virtual Learning Disability and Autism awareness training for public and professions was run 6 times with a total attendance of 170 beneficiaries. Topics covered included: - Autism Awareness Training for BAVO - Virtual Women's Health Training in partnership with Public Health Wales - Virtual Medical Student Training for Cwm Taf Morgannwg UHB BCBC tasked People First Bridgend with converting all written materials distributed by the community learning disability team into Easy Read format. These documents included: - Direct Payments information - Feedback and Complaints information - Fair Charging information People First Bridgend continued the BCBC commissioned Supported Living Accommodation consultation work virtually. In total, 95 tenants were interviewed, with 85 stories being written up. The consultation covers 7 areas, which include 49 housing units with 113 tenants. This work is still a going concern. People First Bridgend participated in the following collaboration and representation events: - BCBC — TEC Supported Living Pilot Project group - All Wales People First — Regional Council Meetings - All Wales People First — National Council Meetings - All Wales People First — Support Worker Advisory Networks - BCBC — Bridgend Community Cohesion and Equality Forum - BCBC — Disability Confident Employer Scheme Consultation - Diverse Cymru – Draft Equality Objectives - Age Cymru — Cwm Taf Advocacy Network Meeting - Age Cymru — National Advocacy Network Meeting - Cwm Taf People First — Annual General Meeting
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		Throughout the year, People First Bridgend worked in partnership with the following organisations: - Cwm Taf People First — The future of Daytime Opportunities planning - Cwm Taf People First — My Day My Way Project - Cwm Taf People First — Service-user friendships workshop - Cwm Taf Regional Partnership Board – Branding Workshop - Cwm Taf Regional Partnership Board – Communication and Engagement Research - Diverse Cymru – Draft Equality Objectives - University College of London and Mencap — “Standing Up For Myself” Anti-Discrimination Research Project.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	See above.
Performance of fundraising activities against objectives set	Para 1.41	N/A
Investment performance against objectives	Para 1.41	N/A
Other		In addition to our virtual activities, through the pandemic, all staff made themselves available to beneficiaries for ad-hoc support. This is not represented in the above performance information as it was too difficult to record or quantify. People First Bridgend were contacted by University College of London, who, in partnership with MENCAP, successfully piloted Project STORM on People First’s Advisory Team. This project was designed to increase people with learning disabilities awareness around discrimination and how to deal with it. People First Bridgend also worked in partnership with Cwm Taf People First on a project called My Day My Way, which looked to find out what people with learning disabilities wanted their life to look like after lockdown.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The Trustees has sufficient resources through its current funding to continue in the immediate future.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	"Reserves" are that part of the People First Bridgend's funds not subject to commitments, planned expenditure or other restrictions. People First Bridgend will match reserves to its requirements and no more. The Trustees aim to maintain reserves at a level that is at least equivalent to three months' operational expenditure.
Amount of reserves held	Para 1.22	£_____
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	People First Bridgend currently receives its funds solely from its local authority—this includes core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate. <u>COVID-19</u> During the report period, a pandemic lockdown was put in place by the Welsh Government to deal with the COVID-19 virus. This affected the charity's ability to carry out its service because of restrictions around face-to-face work and staff illness related to the pandemic lockdown. Restrictions have started to ease, and a vaccination programme is well underway. People First Bridgend are now doing face-to-face independent advocacy, but its group activities remain remote, with infrequent face-to-face gatherings only on special occasions. During 2021-22, the organisation plans to move to a virtual office arrangement, with all staff working remotely. It continues to maintain its usual funding with the local authority. The charity does not expect its funding to be cut during the period 2021-22.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	People First Bridgend has held a Service Level Agreement with Bridgend County Borough Council for the past 25 years which provides core funding. People First Bridgend also has a separate contract with BCBC to provide Statutory Independent Professional Advocacy.
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	See explanation of uncertainties.

Structure, Governance and Management

Description of charity's trusts:		N/A
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charity 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	Para 1.25	Trustees are selected in line with the Section 9 and 10 of the constitution: - Are over 18 - Have the skills, knowledge and experience needed for the effective administration of the CIO - Are invited to attend a meeting - Are approved by the trustees at an executive meeting

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	People First Bridgend has policies in place for inducing new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include: - Trustee Code of Conduct - Values Statement - Conflict of Interests Policy - Training and Development Policy Trustees are also issued with a portfolio of information including the constitution, annual report, management accounts, charity commission guidance.
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The charity's organisational structure and any wider network with which the charity works	Para 1.51	Organisational Structure Executive Committee: - 7 Trustees Staff Team: - Operational Manager - Independent Professional Advocate - Non-statutory Independent Advocate - Training and Development Worker - BSSG Facilitator People First Bridgend also has an Advisory Team made up of 10 beneficiaries which are consulted in matters of change and direction. This allows the organisation to be user-led without its potentially vulnerable beneficiary group being exposed to the legal responsibilities of being a trustee. People First Bridgend is part of the wider People First movement, with which it maintains networking links. In particular, its national counterpart All Wales People First who act as a conduit between local, regional and national matters.
Relationship with any related parties	Para 1.51	N/A
Other		N/A

Reference and Administrative details

Charity name	People First Bridgend
Other name the charity uses	Previously known as Bridgend People First
Registered charity number	11-66-485
Charity's principal address	Office 28 and 32 Apollo Business Village Heol Persondy Aberkenfig Bridgend CF32 9RF

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	Judith Pickard			Executive Committee
2	Jean Gregson	Acting Chairperson		Executive Committee
3	Heather Williams			Executive Committee
4	Elaine Williams			Executive Committee
5	Alun Matthews			Executive Committee
7	Mike Harris		21/01/2021 – Present	Executive Committee
8	Alys Jenkins		21/01/2021 – Present	Executive Committee
9				
10				
11				
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17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

Operational Manager – Adam Kurowski Wakeford

Exemptions from disclosure

Reason for non-disclosure of key personnel details

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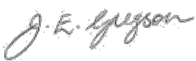
Other optional information

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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)	Jean Gregson	Judith Pickard
Position (eg Secretary, Chair, etc)	Acting Chairperson	Trustee
Date	24/09/2021	

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2021
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**CONTENTS OF THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2021**

	Page
Report of the Trustees	1 to 8
Independent Examiner's Report	9
Statement of Financial Activities	10
Balance Sheet	11
Notes to the Financial Statements	12 to 18

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

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

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

Activities

People First Bridgend (PFB) is an independent advocacy provider that supports people with a learning disability and/or with autism to express their voice and choices in relation to social services, to engage in their local community and to maintain their own independence as far as possible.

Its main activities are divided between statutory and non-statutory advocacy services.

PFB provides statutory advocacy through a contract with Bridgend County Borough Council (BCBC) to provide learning disability-specialist Independent Professional Advocacy, as required by the Social Services and Well-being (Wales) Act 2014. This service supports people with learning disabilities to understand and make choices about their care and support whilst in receipt of statutory services or processes, such as social services assessments.

PFB provide non-statutory advocacy through a separate service level agreement with BCBC. Under this, it provides a range of services, such as self-advocacy and peer-support groups, disability awareness training for public and professionals, translation of documents into Easy Read, and other ad-hoc activities that promote self-advocacy skills, participation and representation and co-production.

The service level agreement also funds the core costs of the organisation, such as management, administration, and office facilities.

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

ACHIEVEMENT AND PERFORMANCE

Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council.

The COVID-19 pandemic meant that all face-to-face activities had to stop due to emergency lockdown conditions. The organisation struggled to continue at first, but made adaptations throughout the year that allowed its beneficiaries to remain supported.

People First Bridgend acquired money through the Integrated Care Fund to buy tablet PCs for some of its group members. This was to enable them to continue participation in virtual self-advocacy activities, keep in contact with friends and families and access any other activities which helped them maintain positive well-being whilst isolating.

Below is a breakdown of how the services performed throughout the year.

Statutory Independent Professional Advocacy - BCBC

The service received 16 new referrals during the year. They came from the following sources:

- BCBC Social Services Learning Disability Team
- BCBC Social Services Looked After Children Team
- Mirus
- Parc Prison
- Public Service Ombudsman for Wales
- Bridgend Voice and Choice Advocacy Hub

In total, the service supported 55 unique beneficiaries with 103 advocacy issues.

Throughout the year, the service supported people with following advocacy issues:

- Assessment, care and support planning and reviews
- Safeguarding
- Accessing information, advice and assistance
- Accommodation issues
- Concern, dissatisfaction and complaints
- Change of service type or preparing to leave hospital and return to the community
- Preparing to leave prison
- Legal
- Court of Protection Investigation
- Family conflicts of interest
- Prison Transgender Case Board Review

17 beneficiaries and 22 advocacy issues were closed.

The service made a total of 9 signpostings to the following organisations:

- Tros Gynol Plant
- Mental Health Matters Wales
- Advocacy Support Cymru
- Advocacy Matters Wales
- PFB Non-statutory Advocacy Service
- Cardiff and Vale Advocacy Gateway
- BAVO Community Navigators
- Christians Against Poverty

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2021**

Peer Support and Skills for Independence SLA - BCBC

The Non-statutory Independent Advocacy Service received 11 new referrals.

In total, the service supported 25 beneficiaries with 41 advocacy issues, which included:

The service supported people with the following advocacy issues:

- Assessment, Care and Support Planning, Reviews
- Accessing Information, Advice and Assistance
- Accommodation
- Concern, Dissatisfaction, Complaints
- Benefits Application, Challenges, Tribunal Process
- Care and Legal Proceedings
- Social Isolation and promoting well-being
- Contacting officialdom and related statutory organisations
- Safeguarding
- Accessing healthcare
- Securing financial entitlements
- Care proceedings
- Integrated Autism Service referrals
- PAM assessments
- Production of Easy Read minutes for meetings

The Skills for Independence Self-advocacy group could not run, due to COVID-19 restrictions and staff capacity. Instead, the organisation developed activity packs that were sent to keep people informed and occupied during lockdown.

15 activity packs were developed and sent monthly to 47 unique beneficiaries. In total, 740 activity packs were sent.

Activity packs included the following content:

- Arts and Crafts Activities
- BCBC Budget Consultation
- COVID-19 Lockdown Rules/Guidance
- Crosswords/Colouring/Puzzles
- Emergency Numbers/information
- Hate Crime Consultation
- Health and Safety/PPE Guidance
- Health Eating Recipes
- Hospital Traffic Light System Forms
- Keep Safe Cymru Registration Forms
- Learning Disability Wales Research Questionnaire
- Mindfulness Exercises
- SBUHB Report on LD Services

At the beginning of the pandemic, Advisory Team members were given phone support, but eventually people started to access equipment that allowed them to meet virtually.

In total, there were 18 virtual Advisory Team meetings with 16 unique beneficiaries.

The following topics were covered during meetings:

- Zoom tutorial and practical activities
- Coronavirus FAQ

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

- Pandemic Rules and Quiz
- BCBC Budget Consultation
- Remembrance Day Event
- History of Learning Disability and Self-advocacy
- SBUHB Service-user Consultation
- All Wales People First Bridgend Hate Crime Consultation
- Memorial Service for Advisory Team Member
- Memorial Service for All Wales People First Bridgend Representative

Members of the Bridgend Spectrum Social Support Group struggled to adapt to virtual meetings, but the BSSG facilitator setup weekly virtual support groups and gave additional support through social media and ad-hoc phone calls.

In total, 56 virtual meetings were run for 10 unique beneficiaries.

Virtual Learning Disability and Autism awareness training for public and professionals was run 6 times with a total attendance of 170 beneficiaries.

Topics covered included:

- Autism Awareness Training for BAVO
- Virtual Women's Health Training in partnership with Public Health Wales
- Virtual Medical Student Training for Cwm Taf Morgannwg UHB

BCBC tasked People First Bridgend with converting all written materials distributed by the Community Learning Disability Team into Easy Read format. These documents included:

- Direct Payments information
- Feedback and Complaints information
- Fair Charging information

People First Bridgend continued the BCBC commissioned Supported Living Accommodation consultation work virtually.

In total, 95 tenants were interviewed, with 85 stories being written up.

The consultation covers 7 areas, which include 49 housing units with 113 tenants. This work is still a going concern.

People First Bridgend participated in the following collaboration and representation events:

- BCBC - TEC Supported Living Pilot Project group
- All Wales People First Bridgend - Regional Council Meetings
- All Wales People First Bridgend - National Council Meetings
- All Wales People First Bridgend - Support Worker Advisory Networks
- BCBC - Bridgend Community Cohesion and Equality Forum
- BCBC - Disability Confident Employer Scheme Consultation
- Diverse Cymru - Draft Equality Objectives
- Age Cymru - Cwm Taf Advocacy Network Meeting
- Age Cymru - National Advocacy Network Meeting
- Cwm Taf People First Bridgend - Annual General Meeting

Throughout the year, People First Bridgend worked in partnership with the following organisations:

- Cwm Taf People First Bridgend - The future of Daytime Opportunities planning
- Cwm Taf People First Bridgend - My Day My Way Project
- Cwm Taf People First Bridgend - Service-user friendships workshop

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

- Cwm Taf Regional Partnership Board - Branding Workshop
- Cwm Taf Regional Partnership Board - Communication and Engagement Research
- Diverse Cymru - Draft Equality Objectives
- University College of London and Mencap
- "Standing Up For Myself" Anti-Discrimination Research Project

In addition to our virtual activities, through the pandemic, all staff made themselves available to beneficiaries for ad-hoc support. This is not represented in the above performance information as it was too difficult to record or quantify.

People First Bridgend were contacted by University College of London, who, in partnership with MENCAP, successfully piloted Project STORM on People First Bridgend's Advisory Team. This project was designed to increase people with learning disabilities awareness around discrimination and how to deal with it.

People First Bridgend also worked in partnership with Cwm Taf People First Bridgend on a project called My Day My Way, which looked to find out what people with learning disabilities wanted their life to look like after lockdown.

FINANCIAL REVIEW

Financial position

The Trustees believe the charity has sufficient resources through its current funding to continue into the immediate future.

Principal funding sources

People First Bridgend has held a Service Level Agreement with Bridgend County Borough Council for the past 25 years which provides core funding.

People First Bridgend also has a separate contract with BCBC to provide Statutory Independent Professional Advocacy.

Reserves policy

"Reserves" are that part of the People First Bridgend's funds not subject to commitments, planned expenditure or other restrictions.

People First Bridgend will match reserves to its requirements and no more.

The Trustees aim to maintain reserves at a level that is at least equivalent to three months' operational expenditure.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

FINANCIAL REVIEW

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

COVID-19

During the report period, a pandemic lockdown was put in place by the Welsh Government to deal with the COVID-19 virus.

This affected the charity's ability to carry out its service because of restrictions around face-to-face work and staff illness related to the pandemic lockdown.

Restrictions have started to ease, and a vaccination programme is well underway. People First Bridgend are now doing face-to-face independent advocacy, but its group activities remain remote, with infrequent face-to-face gatherings only on special occasions.

During 2021-22, the organisation plans to move to a virtual office arrangement, with all staff working remotely.

It continues to maintain its usual funding with the local authority. The charity does not expect its funding to be cut during the period 2021-22.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

People First Bridgend is a Charitable Incorporated Organisation.

Recruitment and appointment of new trustees

Appointed for a term of 3 years, after the initial trustees appointed to set up the CIO, by a resolution passed at a properly convened meeting of the charity trustees.

Trustees are selected in line with the Section 9 and 10 of the constitution:

- Are over 18
- Have the skills, knowledge and experience needed for the effective administration of the CIO
- Are invited to attend a meeting
- Are approved by the trustees at an executive meeting

People First Bridgend has policies in place for inducting new trustees and ensuring that trustee's knowledge and skills are fit for their roles. These include:

- Trustee Code of Conduct
- Values Statement
- Conflict of Interests Policy
- Training and Development Policy

Trustees are also issued with a portfolio of information including the constitution, annual report, management accounts, charity commission guidance.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Executive Committee:

- 7 Trustees

Staff Team:

- Operational Manager
- Independent Professional Advocate
- Non-statutory Independent Advocate
- Training and Development Worker
- BSSG Facilitator

People First Bridgend also has an Advisory Team made up of 10 beneficiaries which are consulted in matters of change and direction. This allows the organisation to be user-led without its potentially vulnerable beneficiary group being exposed to the legal responsibilities of being a trustee.

People First Bridgend is part of the wider People First movement, with which it maintains networking links. In particular, its national counterpart All Wales People First who act as a conduit between local, regional and national matters.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 28 and 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Judith Pickard
Jean Gregson
Heather Williams
Alun Phillips
Elaine Williams

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2021**

Approved by order of the board of trustees on 24 September 2021 and signed on its behalf by:

A handwritten signature in black ink, appearing to read 'J A Pickard', with a horizontal line drawn underneath the name.

Miss J A Pickard - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2021.

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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA
Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

24 September 2021

PEOPLE FIRST BRIDGEND

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

	Notes	Unrestricted fund £	Restricted fund £	2021 Total funds £	2020 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		-	-	-	693
Charitable activities	2				
Supporting people with learning disability		5,251	96,883	102,134	96,332
Total		5,251	96,883	102,134	97,025
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		8,455	92,805	101,260	105,838
NET INCOME/(EXPENDITURE)		(3,204)	4,078	874	(8,813)
RECONCILIATION OF FUNDS					
Total funds brought forward		19,781	833	20,614	29,427
TOTAL FUNDS CARRIED FORWARD		16,577	4,911	21,488	20,614

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

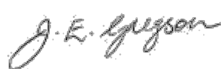
BALANCE SHEET
31 MARCH 2021

	Notes	Unrestricted fund £	Restricted fund £	2021 Total funds £	2020 Total funds £
FIXED ASSETS					
Tangible assets	8	-	4,064	4,064	4,808
CURRENT ASSETS					
Debtors	9	-	238	238	386
Cash at bank and in hand		17,637	2,638	20,275	21,911
		<u>17,637</u>	<u>2,876</u>	<u>20,513</u>	<u>22,297</u>
CREDITORS					
Amounts falling due within one year	10	(1,060)	(2,029)	(3,089)	(6,491)
NET CURRENT ASSETS		<u>16,577</u>	<u>847</u>	<u>17,424</u>	<u>15,806</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>16,577</u>	<u>4,911</u>	<u>21,488</u>	<u>20,614</u>
NET ASSETS		<u>16,577</u>	<u>4,911</u>	<u>21,488</u>	<u>20,614</u>
FUNDS	11				
Unrestricted funds				16,577	19,781
Restricted funds				<u>4,911</u>	<u>833</u>
TOTAL FUNDS				<u>21,488</u>	<u>20,614</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 24 September 2021 and were signed on its behalf by:



J A Pickard - Trustee



J Gregson - Trustee

The notes form part of these financial statements

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

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

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

2. INCOME FROM CHARITABLE ACTIVITIES

The BCBC Peer-support and Skills for Independence SLA grant was used to provide preventative advocacy-related services to people with learning disabilities and/or autism spectrum condition.

The BCBC Statutory Independent Professional Advocacy contract funds were used to provide crisis/intervention advocacy services to people with learning disabilities and/or autism spectrum condition.

The breakdown of grant income received during the year is as follows:

	£
BCBC SLA Grant	68,000
BCBC SIPA Contract	27,000
Intergrated Care Fund	1,883
	<u>96,883</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>83,162</u>	<u>18,098</u>	<u>101,260</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2021 nor for the year ended 31 March 2020.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2021 nor for the year ended 31 March 2020.

5. STAFF COSTS

	2021 £	2020 £
Wages and salaries	63,232	69,625
Other pension costs	2,431	-
	<u>65,663</u>	<u>69,625</u>

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

	2021	2020
Direct Charitable Activities	<u>5</u>	<u>6</u>

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

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

5. STAFF COSTS - continued

The total amount paid to key management personnel in the financial year was £27,934.

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	693	-	693
Charitable activities			
Supporting people with learning disability	1,332	95,000	96,332
Total	2,025	95,000	97,025
 EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	-	105,838	105,838
NET INCOME/(EXPENDITURE)	2,025	(10,838)	(8,813)
 RECONCILIATION OF FUNDS			
Total funds brought forward	17,756	11,671	29,427
TOTAL FUNDS CARRIED FORWARD	19,781	833	20,614

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £1,730.

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

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2020	1,405	31,893	33,298
Additions	-	564	564
At 31 March 2021	1,405	32,457	33,862
DEPRECIATION			
At 1 April 2020	1,405	27,085	28,490
Charge for year	-	1,308	1,308
At 31 March 2021	1,405	28,393	29,798
NET BOOK VALUE			
At 31 March 2021	-	4,064	4,064
At 31 March 2020	-	4,808	4,808

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021 £	2020 £
Prepayments and accrued income	238	386

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021 £	2020 £
Trade creditors	-	2,700
Other creditors	3,089	3,791
	3,089	6,491

11. MOVEMENT IN FUNDS

	At 1.4.20 £	Net movement in funds £	At 31.3.21 £
Unrestricted funds			
General fund	19,781	(3,204)	16,577
Restricted funds			
Advocacy	833	4,078	4,911
TOTAL FUNDS	20,614	874	21,488

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

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	5,251	(8,455)	(3,204)
Restricted funds			
Advocacy	96,883	(92,805)	4,078
TOTAL FUNDS	<u>102,134</u>	<u>(101,260)</u>	<u>874</u>

Comparatives for movement in funds

	At 1.4.19 £	Net movement in funds £	At 31.3.20 £
Unrestricted funds			
General fund	17,756	2,025	19,781
Restricted funds			
Advocacy	11,671	(10,838)	833
TOTAL FUNDS	<u>29,427</u>	<u>(8,813)</u>	<u>20,614</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	2,025	-	2,025
Restricted funds			
Advocacy	95,000	(105,838)	(10,838)
TOTAL FUNDS	<u>97,025</u>	<u>(105,838)</u>	<u>(8,813)</u>

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

11. MOVEMENT IN FUNDS - continued

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

	At 1.4.19 £	Net movement in funds £	At 31.3.21 £
Unrestricted funds			
General fund	17,756	(1,179)	16,577
Restricted funds			
Advocacy	11,671	(6,760)	4,911
TOTAL FUNDS	<u>29,427</u>	<u>(7,939)</u>	<u>21,488</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	7,276	(8,455)	(1,179)
Restricted funds			
Advocacy	191,883	(198,643)	(6,760)
TOTAL FUNDS	<u>199,159</u>	<u>(207,098)</u>	<u>(7,939)</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

In the financial year, £1,548 (2020: £3,200) was paid to former manager and trustee of People First Bridgend, Katrina Kurowski. The full amount was in relation to consultancy work on a project for Bridgend County Council carried out on behalf of People First Bridgend. In addition, the £2,700 owed at the end of the last accounting year was paid, and there was no remaining balance to be paid at the year end.

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2021
FOR
PEOPLE FIRST BRIDGEND**

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**CONTENTS OF THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2021**

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Balance Sheet	11
Notes to the Financial Statements	12 to 18

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

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

OBJECTIVES AND ACTIVITIES

Objectives and aims

1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.
2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.
3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.
4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.

Activities

People First Bridgend (PFB) is an independent advocacy provider that supports people with a learning disability and/or with autism to express their voice and choices in relation to social services, to engage in their local community and to maintain their own independence as far as possible.

Its main activities are divided between statutory and non-statutory advocacy services.

PFB provides statutory advocacy through a contract with Bridgend County Borough Council (BCBC) to provide learning disability-specialist Independent Professional Advocacy, as required by the Social Services and Well-being (Wales) Act 2014. This service supports people with learning disabilities to understand and make choices about their care and support whilst in receipt of statutory services or processes, such as social services assessments.

PFB provide non-statutory advocacy through a separate service level agreement with BCBC. Under this, it provides a range of services, such as self-advocacy and peer-support groups, disability awareness training for public and professionals, translation of documents into Easy Read, and other ad-hoc activities that promote self-advocacy skills, participation and representation and co-production.

The service level agreement also funds the core costs of the organisation, such as management, administration, and office facilities.

Public benefit

Trustees ensure that all decisions regarding the use of funds and operations are in line solely with the objects of the charity and its operations benefit its primary beneficiaries.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

ACHIEVEMENT AND PERFORMANCE

Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council.

The COVID-19 pandemic meant that all face-to-face activities had to stop due to emergency lockdown conditions. The organisation struggled to continue at first, but made adaptations throughout the year that allowed its beneficiaries to remain supported.

People First Bridgend acquired money through the Integrated Care Fund to buy tablet PCs for some of its group members. This was to enable them to continue participation in virtual self-advocacy activities, keep in contact with friends and families and access any other activities which helped them maintain positive well-being whilst isolating.

Below is a breakdown of how the services performed throughout the year.

Statutory Independent Professional Advocacy - BCBC

The service received 16 new referrals during the year. They came from the following sources:

- BCBC Social Services Learning Disability Team
- BCBC Social Services Looked After Children Team
- Mirus
- Parc Prison
- Public Service Ombudsman for Wales
- Bridgend Voice and Choice Advocacy Hub

In total, the service supported 55 unique beneficiaries with 103 advocacy issues.

Throughout the year, the service supported people with following advocacy issues:

- Assessment, care and support planning and reviews
- Safeguarding
- Accessing information, advice and assistance
- Accommodation issues
- Concern, dissatisfaction and complaints
- Change of service type or preparing to leave hospital and return to the community
- Preparing to leave prison
- Legal
- Court of Protection Investigation
- Family conflicts of interest
- Prison Transgender Case Board Review

17 beneficiaries and 22 advocacy issues were closed.

The service made a total of 9 signpostings to the following organisations:

- Tros Gynol Plant
- Mental Health Matters Wales
- Advocacy Support Cymru
- Advocacy Matters Wales
- PFB Non-statutory Advocacy Service
- Cardiff and Vale Advocacy Gateway
- BAVO Community Navigators
- Christians Against Poverty

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2021**

Peer Support and Skills for Independence SLA - BCBC

The Non-statutory Independent Advocacy Service received 11 new referrals.

In total, the service supported 25 beneficiaries with 41 advocacy issues, which included:

The service supported people with the following advocacy issues:

- Assessment, Care and Support Planning, Reviews
- Accessing Information, Advice and Assistance
- Accommodation
- Concern, Dissatisfaction, Complaints
- Benefits Application, Challenges, Tribunal Process
- Care and Legal Proceedings
- Social Isolation and promoting well-being
- Contacting officialdom and related statutory organisations
- Safeguarding
- Accessing healthcare
- Securing financial entitlements
- Care proceedings
- Integrated Autism Service referrals
- PAM assessments
- Production of Easy Read minutes for meetings

The Skills for Independence Self-advocacy group could not run, due to COVID-19 restrictions and staff capacity. Instead, the organisation developed activity packs that were sent to keep people informed and occupied during lockdown.

15 activity packs were developed and sent monthly to 47 unique beneficiaries. In total, 740 activity packs were sent.

Activity packs included the following content:

- Arts and Crafts Activities
- BCBC Budget Consultation
- COVID-19 Lockdown Rules/Guidance
- Crosswords/Colouring/Puzzles
- Emergency Numbers/information
- Hate Crime Consultation
- Health and Safety/PPE Guidance
- Health Eating Recipes
- Hospital Traffic Light System Forms
- Keep Safe Cymru Registration Forms
- Learning Disability Wales Research Questionnaire
- Mindfulness Exercises
- SBUHB Report on LD Services

At the beginning of the pandemic, Advisory Team members were given phone support, but eventually people started to access equipment that allowed them to meet virtually.

In total, there were 18 virtual Advisory Team meetings with 16 unique beneficiaries.

The following topics were covered during meetings:

- Zoom tutorial and practical activities
- Coronavirus FAQ

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

- Pandemic Rules and Quiz
- BCBC Budget Consultation
- Remembrance Day Event
- History of Learning Disability and Self-advocacy
- SBUHB Service-user Consultation
- All Wales People First Bridgend Hate Crime Consultation
- Memorial Service for Advisory Team Member
- Memorial Service for All Wales People First Bridgend Representative

Members of the Bridgend Spectrum Social Support Group struggled to adapt to virtual meetings, but the BSSG facilitator setup weekly virtual support groups and gave additional support through social media and ad-hoc phone calls.

In total, 56 virtual meetings were run for 10 unique beneficiaries.

Virtual Learning Disability and Autism awareness training for public and professionals was run 6 times with a total attendance of 170 beneficiaries.

Topics covered included:

- Autism Awareness Training for BAVO
- Virtual Women's Health Training in partnership with Public Health Wales
- Virtual Medical Student Training for Cwm Taf Morgannwg UHB

BCBC tasked People First Bridgend with converting all written materials distributed by the Community Learning Disability Team into Easy Read format. These documents included:

- Direct Payments information
- Feedback and Complaints information
- Fair Charging information

People First Bridgend continued the BCBC commissioned Supported Living Accommodation consultation work virtually.

In total, 95 tenants were interviewed, with 85 stories being written up.

The consultation covers 7 areas, which include 49 housing units with 113 tenants. This work is still a going concern.

People First Bridgend participated in the following collaboration and representation events:

- BCBC - TEC Supported Living Pilot Project group
- All Wales People First Bridgend - Regional Council Meetings
- All Wales People First Bridgend - National Council Meetings
- All Wales People First Bridgend - Support Worker Advisory Networks
- BCBC - Bridgend Community Cohesion and Equality Forum
- BCBC - Disability Confident Employer Scheme Consultation
- Diverse Cymru - Draft Equality Objectives
- Age Cymru - Cwm Taf Advocacy Network Meeting
- Age Cymru - National Advocacy Network Meeting
- Cwm Taf People First Bridgend - Annual General Meeting

Throughout the year, People First Bridgend worked in partnership with the following organisations:

- Cwm Taf People First Bridgend - The future of Daytime Opportunities planning
- Cwm Taf People First Bridgend - My Day My Way Project
- Cwm Taf People First Bridgend - Service-user friendships workshop

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

- Cwm Taf Regional Partnership Board - Branding Workshop
- Cwm Taf Regional Partnership Board - Communication and Engagement Research
- Diverse Cymru - Draft Equality Objectives
- University College of London and Mencap
- "Standing Up For Myself" Anti-Discrimination Research Project

In addition to our virtual activities, through the pandemic, all staff made themselves available to beneficiaries for ad-hoc support. This is not represented in the above performance information as it was too difficult to record or quantify.

People First Bridgend were contacted by University College of London, who, in partnership with MENCAP, successfully piloted Project STORM on People First Bridgend's Advisory Team. This project was designed to increase people with learning disabilities awareness around discrimination and how to deal with it.

People First Bridgend also worked in partnership with Cwm Taf People First Bridgend on a project called My Day My Way, which looked to find out what people with learning disabilities wanted their life to look like after lockdown.

FINANCIAL REVIEW

Financial position

The Trustees believe the charity has sufficient resources through its current funding to continue into the immediate future.

Principal funding sources

People First Bridgend has held a Service Level Agreement with Bridgend County Borough Council for the past 25 years which provides core funding.

People First Bridgend also has a separate contract with BCBC to provide Statutory Independent Professional Advocacy.

Reserves policy

"Reserves" are that part of the People First Bridgend's funds not subject to commitments, planned expenditure or other restrictions.

People First Bridgend will match reserves to its requirements and no more.

The Trustees aim to maintain reserves at a level that is at least equivalent to three months' operational expenditure.

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

FINANCIAL REVIEW

Going concern

People First Bridgend currently receives its funds solely from its local authority including core funding. Therefore, any risks and subsequent changes to the budgets of the local authority have the potential to affect the charity's funding and its ability to operate.

COVID-19

During the report period, a pandemic lockdown was put in place by the Welsh Government to deal with the COVID-19 virus.

This affected the charity's ability to carry out its service because of restrictions around face-to-face work and staff illness related to the pandemic lockdown.

Restrictions have started to ease, and a vaccination programme is well underway. People First Bridgend are now doing face-to-face independent advocacy, but its group activities remain remote, with infrequent face-to-face gatherings only on special occasions.

During 2021-22, the organisation plans to move to a virtual office arrangement, with all staff working remotely.

It continues to maintain its usual funding with the local authority. The charity does not expect its funding to be cut during the period 2021-22.

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Governing document

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2021

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Executive Committee:

- 7 Trustees

Staff Team:

- Operational Manager
- Independent Professional Advocate
- Non-statutory Independent Advocate
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- BSSG Facilitator

People First Bridgend also has an Advisory Team made up of 10 beneficiaries which are consulted in matters of change and direction. This allows the organisation to be user-led without its potentially vulnerable beneficiary group being exposed to the legal responsibilities of being a trustee.

People First Bridgend is part of the wider People First movement, with which it maintains networking links. In particular, its national counterpart All Wales People First who act as a conduit between local, regional and national matters.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 28 and 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

Judith Pickard
Jean Gregson
Heather Williams
Alun Phillips
Elaine Williams

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 MARCH 2021**

Approved by order of the board of trustees on 24 September 2021 and signed on its behalf by:

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

Miss J A Pickard - Trustee

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE FIRST BRIDGEND

Independent examiner's report to the trustees of People First Bridgend

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2021.

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 Act and in carrying out my examination I have followed all 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; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

J Payne ACA
Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

24 September 2021

PEOPLE FIRST BRIDGEND

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

	Notes	Unrestricted fund £	Restricted fund £	2021 Total funds £	2020 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies		-	-	-	693
Charitable activities	2				
Supporting people with learning disability		5,251	96,883	102,134	96,332
Total		5,251	96,883	102,134	97,025
EXPENDITURE ON					
Charitable activities	3				
Supporting people with learning disability		8,455	92,805	101,260	105,838
NET INCOME/(EXPENDITURE)		(3,204)	4,078	874	(8,813)
RECONCILIATION OF FUNDS					
Total funds brought forward		19,781	833	20,614	29,427
TOTAL FUNDS CARRIED FORWARD		16,577	4,911	21,488	20,614

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

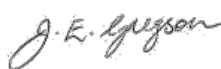
**BALANCE SHEET
31 MARCH 2021**

	Notes	Unrestricted fund £	Restricted fund £	2021 Total funds £	2020 Total funds £
FIXED ASSETS					
Tangible assets	8	-	4,064	4,064	4,808
CURRENT ASSETS					
Debtors	9	-	238	238	386
Cash at bank and in hand		17,637	2,638	20,275	21,911
		17,637	2,876	20,513	22,297
CREDITORS					
Amounts falling due within one year	10	(1,060)	(2,029)	(3,089)	(6,491)
NET CURRENT ASSETS		16,577	847	17,424	15,806
TOTAL ASSETS LESS CURRENT LIABILITIES		16,577	4,911	21,488	20,614
NET ASSETS		16,577	4,911	21,488	20,614
FUNDS	11				
Unrestricted funds				16,577	19,781
Restricted funds				4,911	833
TOTAL FUNDS				21,488	20,614

The financial statements were approved by the Board of Trustees and authorised for issue on 24 September 2021 and were signed on its behalf by:



J A Pickard - Trustee



J Gregson - Trustee

The notes form part of these financial statements

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

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland, and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Income

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

Expenditure

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

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Improvements to property	- 25% on cost
Fixtures and fittings	- 25% on reducing balance

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

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

2. INCOME FROM CHARITABLE ACTIVITIES

The BCBC Peer-support and Skills for Independence SLA grant was used to provide preventative advocacy-related services to people with learning disabilities and/or autism spectrum condition.

The BCBC Statutory Independent Professional Advocacy contract funds were used to provide crisis/intervention advocacy services to people with learning disabilities and/or autism spectrum condition.

The breakdown of grant income received during the year is as follows:

	£
BCBC SLA Grant	68,000
BCBC SIPA Contract	27,000
Intergrated Care Fund	1,883
	<u>96,883</u>

3. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Supporting people with learning disability	<u>83,162</u>	<u>18,098</u>	<u>101,260</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 March 2021 nor for the year ended 31 March 2020.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 March 2021 nor for the year ended 31 March 2020.

5. STAFF COSTS

	2021 £	2020 £
Wages and salaries	63,232	69,625
Other pension costs	2,431	-
	<u>65,663</u>	<u>69,625</u>

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

	2021	2020
Direct Charitable Activities	<u>5</u>	<u>6</u>

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

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

5. STAFF COSTS - continued

The total amount paid to key management personnel in the financial year was £27,934.

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted fund £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	693	-	693
Charitable activities			
Supporting people with learning disability	1,332	95,000	96,332
Total	2,025	95,000	97,025
 EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	-	105,838	105,838
NET INCOME/(EXPENDITURE)	2,025	(10,838)	(8,813)
 RECONCILIATION OF FUNDS			
Total funds brought forward	17,756	11,671	29,427
TOTAL FUNDS CARRIED FORWARD	19,781	833	20,614

7. INDEPENDENT EXAMINERS FEES

Included in charitable activities costs are fees payable for Independent Examination of £1,730.

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

8. TANGIBLE FIXED ASSETS

	Improvements to property £	Fixtures and fittings £	Totals £
COST			
At 1 April 2020	1,405	31,893	33,298
Additions	-	564	564
At 31 March 2021	1,405	32,457	33,862
DEPRECIATION			
At 1 April 2020	1,405	27,085	28,490
Charge for year	-	1,308	1,308
At 31 March 2021	1,405	28,393	29,798
NET BOOK VALUE			
At 31 March 2021	-	4,064	4,064
At 31 March 2020	-	4,808	4,808

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021 £	2020 £
Prepayments and accrued income	238	386

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2021 £	2020 £
Trade creditors	-	2,700
Other creditors	3,089	3,791
	3,089	6,491

11. MOVEMENT IN FUNDS

	At 1.4.20 £	Net movement in funds £	At 31.3.21 £
Unrestricted funds			
General fund	19,781	(3,204)	16,577
Restricted funds			
Advocacy	833	4,078	4,911
TOTAL FUNDS	20,614	874	21,488

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

11. MOVEMENT IN FUNDS - continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	5,251	(8,455)	(3,204)
Restricted funds			
Advocacy	96,883	(92,805)	4,078
TOTAL FUNDS	<u>102,134</u>	<u>(101,260)</u>	<u>874</u>

Comparatives for movement in funds

	At 1.4.19 £	Net movement in funds £	At 31.3.20 £
Unrestricted funds			
General fund	17,756	2,025	19,781
Restricted funds			
Advocacy	11,671	(10,838)	833
TOTAL FUNDS	<u>29,427</u>	<u>(8,813)</u>	<u>20,614</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	2,025	-	2,025
Restricted funds			
Advocacy	95,000	(105,838)	(10,838)
TOTAL FUNDS	<u>97,025</u>	<u>(105,838)</u>	<u>(8,813)</u>

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

11. MOVEMENT IN FUNDS - continued

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

	At 1.4.19 £	Net movement in funds £	At 31.3.21 £
Unrestricted funds			
General fund	17,756	(1,179)	16,577
Restricted funds			
Advocacy	11,671	(6,760)	4,911
TOTAL FUNDS	<u>29,427</u>	<u>(7,939)</u>	<u>21,488</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	7,276	(8,455)	(1,179)
Restricted funds			
Advocacy	191,883	(198,643)	(6,760)
TOTAL FUNDS	<u>199,159</u>	<u>(207,098)</u>	<u>(7,939)</u>

Main Projects

Bridgend County Borough Council funding is to:

- Provide an independent advocacy service
- Promote person centred working
- Consult with beneficiaries and provide representation of beneficiaries
- Provide information or signpost beneficiaries to other agencies
- Provide education and training
- Collaborate with other agencies where this will benefit beneficiaries
- Translate information into accessible formats

12. RELATED PARTY DISCLOSURES

In the financial year, £1,548 (2020: £3,200) was paid to former manager and trustee of People First Bridgend, Katrina Kurowski. The full amount was in relation to consultancy work on a project for Bridgend County Council carried out on behalf of People First Bridgend. In addition, the £2,700 owed at the end of the last accounting year was paid, and there was no remaining balance to be paid at the year end.