



**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	<ol style="list-style-type: none"> 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	<p>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.</p> <p>Its main activities are divided between statutory and non-statutory advocacy services.</p> <p>PFB provides statutory advocacy through a contract with Bridgend County Borough Council (BCBC) to provide learning disability-specialist</p>

		<p>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.</p> <p>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.</p> <p>The service level agreement also funds the core costs of the organisation, such as management, administration, and office facilities</p>
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	<p>Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council.</p> <p>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.</p> <p>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.</p> <p>Below is a breakdown of how the services performed throughout the year.</p> <p>Statutory Independent Professional Advocacy – BCBC</p> <p>The service received 16 new referrals during the year. They came from the following sources:</p> <ul style="list-style-type: none"> - BCBC Social Services LD Team - BCBC Social Services LAC Team - Mirus - Parc Prison - Public Service Ombudsman for Wales - Bridgend Voice and Choice Advocacy Hub <p>In total, the service supported 55 unique beneficiaries with 103 advocacy issues.</p> <p>Throughout the year, the service supported people with following advocacy issues:</p> <ul style="list-style-type: none"> - 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

		<ul style="list-style-type: none"> - Prison Transgender Case Board Review <p>17 beneficiaries and 22 advocacy issues were closed.</p> <p>The service made a total of 9 signpostings to the following organisations:</p> <ul style="list-style-type: none"> - 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 <p>Peer-support and Skills for Independence SLA – BCBC</p> <p>The Non-statutory Independent Advocacy Service received 11 new referrals.</p> <p>In total, the service supported 25 beneficiaries with 41 advocacy issues, which included:</p> <p>The service supported people with the following advocacy issues:</p> <ul style="list-style-type: none"> - 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 <p>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.</p>
--	--	---

		<p>15 activity packs were developed and sent monthly to 47 unique beneficiaries. In total, 740 activity packs were sent.</p> <p>Activity packs included the following content:</p> <ul style="list-style-type: none"> - 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 <p>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.</p> <p>In total, there were 18 virtual Advisory Team meetings with 16 unique beneficiaries.</p> <p>The following topics were covered during meetings:</p> <ul style="list-style-type: none"> - 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 <p>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.</p> <p>In total, 56 virtual meetings were run for 10 unique beneficiaries.</p>
--	--	--

		<p>Virtual Learning Disability and Autism awareness training for public and professions was run 6 times with a total attendance of 170 beneficiaries.</p> <p>Topics covered included:</p> <ul style="list-style-type: none"> - 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 <p>BCBC tasked People First Bridgend with converting all written materials distributed by the community learning disability team into Easy Read format. These documents included:</p> <ul style="list-style-type: none"> - Direct Payments information - Feedback and Complaints information - Fair Charging information <p>People First Bridgend continued the BCBC commissioned Supported Living Accommodation consultation work virtually.</p> <p>In total, 95 tenants were interviewed, with 85 stories being written up.</p> <p>The consultation covers 7 areas, which include 49 housing units with 113 tenants. This work is still a going concern.</p> <p>People First Bridgend participated in the following collaboration and representation events:</p> <ul style="list-style-type: none"> - 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
--	--	---

		<p>Throughout the year, People First Bridgend worked in partnership with the following organisations:</p> <ul style="list-style-type: none"> - 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.
--	--	--

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		<p>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.</p> <p>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.</p> <p>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.</p>

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	<p>"Reserves" are that part of the People First Bridgend's funds not subject to commitments, planned expenditure or other restrictions.</p> <p>People First Bridgend will match reserves to its requirements and no more.</p> <p>The Trustees aim to maintain reserves at a level that is at least equivalent to three months' operational expenditure.</p>
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	<p>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.</p> <p><u>COVID-19</u></p> <p>During the report period, a pandemic lockdown was put in place by the Welsh Government to deal with the COVID-19 virus.</p> <p>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.</p> <p>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.</p> <p>During 2021-22, the organisation plans to move to a virtual office arrangement, with all staff working remotely.</p> <p>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.</p>

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	<p>People First Bridgend has held a Service Level Agreement with Bridgend County Borough Council for the past 25 years which provides core funding.</p> <p>People First Bridgend also has a separate contract with BCBC to provide Statutory Independent Professional Advocacy.</p>
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	<p>Trustees are selected in line with the Section 9 and 10 of the constitution:</p> <ul style="list-style-type: none"> - 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	<p>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:</p> <ul style="list-style-type: none"> - Trustee Code of Conduct - Values Statement - Conflict of Interests Policy - Training and Development Policy <p>Trustees are also issued with a portfolio of information including the constitution, annual report, management accounts, charity commission guidance.</p>
--	-----------	---

The charity's organisational structure and any wider network with which the charity works	Para 1.51	<p>Organisational Structure</p> <p>Executive Committee:</p> <ul style="list-style-type: none"> - 7 Trustees <p>Staff Team:</p> <ul style="list-style-type: none"> - Operational Manager - Independent Professional Advocate - Non-statutory Independent Advocate - Training and Development Worker - BSSG Facilitator <p>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.</p> <p>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.</p>
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				
12				
13				
14				
15				
16				
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

--



Other optional information

--

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 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

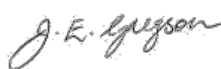
BALANCE SHEET
31 MARCH 2021

	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
		<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
	<hr/>	<hr/>	<hr/>
Total	2,025	95,000	97,025
 EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	-	105,838	105,838
	<hr/>	<hr/>	<hr/>
NET INCOME/(EXPENDITURE)	2,025	(10,838)	(8,813)
 RECONCILIATION OF FUNDS			
Total funds brought forward	17,756	11,671	29,427
	<hr/>	<hr/>	<hr/>
TOTAL FUNDS CARRIED FORWARD	19,781	833	20,614
	<hr/>	<hr/>	<hr/>

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**

	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 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

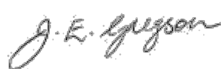
**BALANCE SHEET
31 MARCH 2021**

	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
		<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
	<hr/>	<hr/>	<hr/>
Total	2,025	95,000	97,025
 EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	-	105,838	105,838
	<hr/>	<hr/>	<hr/>
NET INCOME/(EXPENDITURE)	2,025	(10,838)	(8,813)
 RECONCILIATION OF FUNDS			
Total funds brought forward	17,756	11,671	29,427
	<hr/>	<hr/>	<hr/>
TOTAL FUNDS CARRIED FORWARD	19,781	833	20,614
	<hr/>	<hr/>	<hr/>

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.