

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	<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	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>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 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 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.</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	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	<p>Throughout the year, People First Bridgend ran two on-going services commissioned by Bridgend County Borough Council.</p> <p>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.</p> <p>Below is a breakdown of how the services performed throughout the year.</p> <p>Statutory Independent Professional Advocacy</p> <p>We continued to deliver our IPA service to adults with LDs eligible under the Social Services and Well-being (Wales) Act 2014.</p> <p>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.</p> <p>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.</p> <p>Examples of advocacy issues include:</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 - Sale of property - Prison <p>Non-Statutory Independent Advocacy</p> <p>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.</p> <p>As with statutory IPA service, our advocate continued to work under pandemic conditions.</p> <p>Examples of advocacy issues include:</p> <ul style="list-style-type: none"> - Accessing information, advice and guidance - Accommodation issues

		<ul style="list-style-type: none"> - Support to liaise with professionals - Finance issues - Legal processes - Making information accessible <p>The Advisory Team</p> <p>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.</p> <p>Bridgend Spectrum Social/Support Group (BSSG)</p> <p>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.</p> <p>We delivered 9 sessions with 21 trainees. Training topics included:</p> <ul style="list-style-type: none"> - Virtual medical student training - Virtual Diversity Matters, Inclusion Wins for South Wales Police <p>Sub-projects</p> <p>In addition to our usual service work, we took part in 14 sub-projects and attended 20 events and meetings.</p> <p>Some of these included:</p> <p>BCBC - Supported Living Accommodation Consultation</p> <p>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.</p> <p>BCBC - LD Service Development Plan</p> <p>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</p>
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		<p>with 30 stakeholders, including support for 6 self-advocates with LDs.</p> <p>Other collaborative projects which took place during 2021-22:</p> <ul style="list-style-type: none"> - 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		<p>2021-2022 saw the pandemic restrictions ease and activities return to a relative normal.</p> <p>This transition period proved to be challenging for PFB.</p> <p>Two key staff members left PFB at the end of the financial year; two more announced their intention to leave following the year end.</p> <p>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.</p>
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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: <ol style="list-style-type: none"> 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	<p>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.</p> <p>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.</p> <p>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.</p>
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	<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 inducting 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"> • 5 Trustees <p>Staff Team:</p> <ul style="list-style-type: none"> • Operational Manager • Independent Professional Advocate x 2 • Self-advocacy Facilitator • Advocacy Coordinator • BSSG Facilitator

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

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FOR THE YEAR ENDED 31 MARCH 2022**

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**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.

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 on22/09/2022..... and were signed on its behalf by:



.....
Judith Anne Pickard - Trustee



.....
Jean Gregson - Trustee

The notes form part of these financial statements

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

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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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.

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 on22/09/2022..... and were signed on its behalf by:



.....
Judith Anne Pickard - Trustee



.....
Jean Gregson - Trustee

The notes form part of these financial statements

**NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2022**

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.

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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

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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 2022
2. INCOME FROM CHARITABLE ACTIVITIES

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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.

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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	2,879	2,431
	<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			
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EXPENDITURE ON			
Charitable activities			
Supporting people with learning disability	8,455	92,805	101,260
NET INCOME/(EXPENDITURE)	(3,204)	4,078	874
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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.