

Trustee's Annual Report

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



1. Objectives and Activities

Summary of the purposes of the charity as set out in its governing document.	SORP Reference: Para 1.17
<p>People First Bridgend's charity objectives are:</p> <ol style="list-style-type: none">1. To relieve and support people who have a learning disability and/or with autism spectrum condition (hereafter known as "primary beneficiaries") in the County Borough of Bridgend and any other region with which the Borough works collaboratively (hereafter known as "the geographical area"), through services which can enable them to obtain their full rights and privileges as citizens.2. To promote social inclusion for the public benefit by preventing primary beneficiaries from becoming socially excluded, relieving the needs of those primary beneficiaries who are socially excluded and assisting them to integrate into society.3. To advance and promote education of primary beneficiaries through training workshops and other opportunities for learning.4. To advance the education of the general public about the educational, physical, emotional and psychological needs of primary beneficiaries.	
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	SORP Reference: Para 1.17, 1.19
<p>Main Activities</p> <p>People First Bridgend advocates for adults with learning disabilities and neurodiversity living in Bridgend County, Wales.</p> <p>We support these people to:</p> <ul style="list-style-type: none">• Speak-up about important issues affecting their lives,• Have a voice in decisions about their care and support, Be equal, active citizens in their community,• Teach others about what it means to have learning disabilities and neurodiversity.	

We do this through several core activities, including:

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

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

1) Statutory Independent Professional Advocacy:

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

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

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

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

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

SORP Reference:
Para 1.18

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

2. Achievements and Performance

<p>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.</p>	<p>SORP Reference: Para 1.20</p>
<p>Independent Professional Advocacy (IPA)</p> <p>We continued to provide advocacy under the Social Services and Wellbeing (Wales) Act 2014 and for non-statutory issues. This is independent advocacy for adults with learning disabilities or autism accessing health and social services provided by Bridgend County Borough Council, or who live in Bridgend County.</p> <p>IPA makes sure people with care and support needs:</p> <ul style="list-style-type: none"> • Have a voice in what care and support they get, • Have an equal relationship with their care provider, • Have someone who is working in their interests only, • Can understand what is going on or have help to understand if they can't, • Can put their views and wishes across or have help to if they can't. <p>Advisory Team Self-Advocacy Group (A-Team)</p> <p>Our A-Team is made up of adults with learning disabilities from around Bridgend County. They use their self-advocacy voices to speak up about important issues on behalf of Bridgend's learning disability community. They do this for local, regional and national issues.</p> <p>The A-Team consistently met bi-monthly in-person and online. We facilitated sessions around several topical issues for our members to give self-advocacy input, including:</p> <ul style="list-style-type: none"> • Welsh Government's learning disability strategic plan • Budgeting and the cost-of-living crisis • Human Rights Act and the impact of the proposed Bill of Rights • Our local authority's learning disability service development plan • Bridgend's voice in the Cwm Taf Morgannwg region • Staff recruitment • Jargon busting and communicating using easy language <p>Bridgend Spectrum Support Group (BSSG)</p> <p>The BSSG is a peer-support group for adults higher-functioning autism. Practice-based sessions are run in partnership with the Assisted Recovery in the Community centre (ARC). They give members a safe space to be autistic and learn coping skills. A counterpart social session is arranged where members arrange to meet somewhere in the community to put their skills into practice. This year, the group formed greater links with the National Autistic</p>	

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

Accessible Information

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

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

Training

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

Other Advocacy Activities

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

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

Advocacy Quality Performance Mark (Advocacy QPM)

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

QPM Assessment Process

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

QPM Assessor comments on good practice

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

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

QPM Assessor comments on areas for improvement

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

Advocacy QPM Result

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

3. Financial Review

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

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

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

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

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

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

SORP Reference:
Para 1.22

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

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

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

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

Amount of reserves held.

SORP Reference:
Para 1.22

£14,123

Reasons for holding zero reserves.

SORP Reference:
Para 1.22

N/A

Details of fund materially in deficit.

SORP Reference:
Para 1.24

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

Structure, Governance and Management

Type of governing document.	SORP Reference: Para 1.25
Constitution	
How is the charity constituted?	SORP Reference: Para 1.25
Foundation model Charitable Incorporated Organisation (or CIO)	
Trustee selection methods including details of any constitutional provisions.	SORP Reference: Para 1.25
<p>Trustees are appointed for a term of 3 years, after the initial trustees appointed to setup the CIO, by a resolution passed at a properly convened meeting of the charity trustees.</p> <p>Trustees are recruited in line with Section 9 and 10 of the constitution:</p> <ul style="list-style-type: none"> • Are over 18 years old, • have appropriate skills, knowledge and experience to administrate the charity, • are invited to attend a meeting, • are approved by the trustees at a board meeting. 	
Policies and procedures adopted for the induction and training of trustees.	SORP Reference: Para 1.51
<p>When being inducted on the Board, trustees receive:</p> <ul style="list-style-type: none"> • a copy of the charity's constitution, • a meeting with the Operational Manager to introduce the work of the charity, • a copy of the charity's latest annual accounts, • copies of policies and procedures, • copies of the standards which the charity works to, including the Advocacy QPM Code of Practice and the Charity Governance Code for small charities. <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 	

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

SORP Reference:
Para 1.51

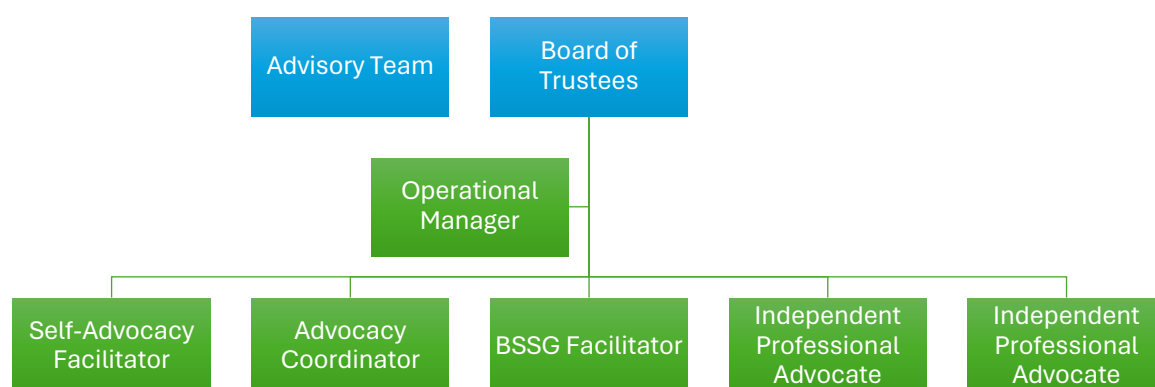
As a foundation CIO, the Board are solely responsible for the charity. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries.

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

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

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

People First Bridgend Structure



Reference and Administrative details

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

Names of the charity trustees who manage the charity			
Trustee Name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Jean Gregson	Chair		Board of Trustees
Heather Williams	Trustee		Board of Trustees
Alun Phillips	Trustee		Board of Trustees
Mike Harris	Trustee		Board of Trustees
Alys Byrne	Trustee	Resigned 21/09/2022	Board of Trustees
Judith Pickard	Trustee	Resigned 30/09/2022	Board of Trustees
Elaine Williams	Trustee	Resigned 17/04/2023	Board of Trustees
Name of CEO/most senior staff:		Adam Kurowski Wakeford – Operational Manager	


Other information:

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

Declarations

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

Signed on behalf of the charity's trustees:

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

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

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

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

OBJECTIVES AND ACTIVITIES

Objectives and aims

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

OBJECTIVES AND ACTIVITIES

Activities

How People First Bridgend is run

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

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

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

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

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

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

The work of People First Bridgend

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

It supports these people to:

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

It does this through several core activities, including:

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

Public benefit

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

ACHIEVEMENT AND PERFORMANCE

People First Bridgend's Services

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

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

Statutory Independent Professional Advocacy

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

Statistics:

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

Referrals came from:

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

Advocacy issues included:

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

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

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

This service is split into several activities:

Independent Advocacy

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

Statistics:

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

Advocacy issues included:

- Child protection procedures

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

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

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

Advisory Team

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

Statistics:

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

Meeting topics included:

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

Bridgend Spectrum Support Group (BSSG)

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

Statistics:

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

Training

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

Easy Read

The following documents were translated into Easy Read:

- BCBC - Compatibility Assessment Tool - Tenant

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

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Advocacy QPM

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QPM Assessment Process

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- Site visit - all stakeholders are interviewed, including staff, trustees, members, commissioners and referrers.
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QPM Assessor comments on good practice

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

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FOR THE YEAR ENDED 31 MARCH 2023**

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

QPM Assessor comments on areas for improvement

- People First Bridgend is an open organisation and is very aware of the areas that need to be addressed. The points below identify the areas we discussed on the site visit.
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- We discussed the difficulties in obtaining feedback from people about their satisfaction of the service. People First Bridgend need to continue to ensure that capturing feedback from individuals who have worked with a statutory advocate, perhaps at different points of the advocacy process, is constantly addressed and recorded.

Advocacy QPM Result

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

FINANCIAL REVIEW

Financial position

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

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

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

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

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

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

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

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

FINANCIAL REVIEW

Principal funding sources

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

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

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

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

Reserves policy

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

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

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

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

Going concern

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

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

FUTURE PLANS

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

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

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

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

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

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

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

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

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

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

Recruitment and appointment of new trustees

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

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

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

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

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

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Board of Trustees

- 4 Trustees

Staff Team

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

Advisory Team

- 14 Members

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

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

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

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

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

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

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

Jean Gregson - Trustee

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

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

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

Responsibilities and basis of report

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

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

Independent examiner's statement

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

1. accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

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

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

26 January 2024

PEOPLE FIRST BRIDGEND

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2023

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

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

**BALANCE SHEET
31 MARCH 2023**

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

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



Jean Gregson - Trustee

The notes form part of these financial statements

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

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

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

Income

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

Expenditure

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

Tangible fixed assets

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

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

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

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

2. INCOME FROM CHARITABLE ACTIVITIES

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

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

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

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

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

3. CHARITABLE ACTIVITIES COSTS

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

4. TRUSTEES' REMUNERATION AND BENEFITS

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

Trustees' expenses

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

5. STAFF COSTS

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

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

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

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

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

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

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

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

7. INDEPENDENT EXAMINERS FEES

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

8. TANGIBLE FIXED ASSETS

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

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

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Prepayments and accrued income	303	299

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

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

11. MOVEMENT IN FUNDS

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

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

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

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

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

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

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

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

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

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

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

11. MOVEMENT IN FUNDS - continued

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

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

Main Projects

Bridgend County Borough Council funding is to:

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

12. RELATED PARTY DISCLOSURES

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

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

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

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

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

OBJECTIVES AND ACTIVITIES

Objectives and aims

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

OBJECTIVES AND ACTIVITIES

Activities

How People First Bridgend is run

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

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

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

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

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

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

The work of People First Bridgend

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

It supports these people to:

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

It does this through several core activities, including:

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

Public benefit

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

ACHIEVEMENT AND PERFORMANCE

People First Bridgend's Services

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

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

Statutory Independent Professional Advocacy

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

Statistics:

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

Referrals came from:

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

Advocacy issues included:

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

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

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

This service is split into several activities:

Independent Advocacy

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

Statistics:

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

Advocacy issues included:

- Child protection procedures

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

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

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

Advisory Team

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

Statistics:

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

Meeting topics included:

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

Bridgend Spectrum Support Group (BSSG)

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

Statistics:

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

Training

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

Easy Read

The following documents were translated into Easy Read:

- BCBC - Compatibility Assessment Tool - Tenant

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

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

Other Activities

People First Bridgend provided representation at the following events:

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

Advocacy QPM

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

QPM Assessment Process

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

QPM Assessor comments on good practice

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

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

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

QPM Assessor comments on areas for improvement

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

Advocacy QPM Result

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

FINANCIAL REVIEW

Financial position

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

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

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

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

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

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

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

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

FINANCIAL REVIEW

Principal funding sources

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

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

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

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

Reserves policy

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

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

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

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

Going concern

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

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

FUTURE PLANS

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

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

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

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

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

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

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

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

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

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

Recruitment and appointment of new trustees

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

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

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

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

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

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2023

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

Board of Trustees

- 4 Trustees

Staff Team

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

Advisory Team

- 14 Members

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

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

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

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

PEOPLE FIRST BRIDGEND

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

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

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

Jean Gregson - Trustee

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

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

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

Responsibilities and basis of report

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

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

Independent examiner's statement

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

1. accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

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

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

26 January 2024

PEOPLE FIRST BRIDGEND

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2023

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

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

**BALANCE SHEET
31 MARCH 2023**

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

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



Jean Gregson - Trustee

The notes form part of these financial statements

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

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

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

Income

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

Expenditure

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

Tangible fixed assets

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

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

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

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

2. INCOME FROM CHARITABLE ACTIVITIES

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

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

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

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

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

3. CHARITABLE ACTIVITIES COSTS

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

4. TRUSTEES' REMUNERATION AND BENEFITS

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

Trustees' expenses

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

5. STAFF COSTS

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

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

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

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

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

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

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

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

7. INDEPENDENT EXAMINERS FEES

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

8. TANGIBLE FIXED ASSETS

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

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

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023 £	2022 £
Prepayments and accrued income	303	299

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

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

11. MOVEMENT IN FUNDS

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

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

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

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

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

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

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

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

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

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

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

11. MOVEMENT IN FUNDS - continued

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

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

Main Projects

Bridgend County Borough Council funding is to:

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

12. RELATED PARTY DISCLOSURES

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

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