

Trustee's Annual Report

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



1. Objectives and Activities

Summary of the purposes of the charity as set out in its governing document.	SORP Reference: Para 1.17
<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>During the reporting period, our IPA service achieved the following:</p> <ul style="list-style-type: none"> • Took 31 New Referrals • Worked with 32 clients • Worked on 123 statutory advocacy issues • Worked on 27 preventive service related issues • Closed 17 clients • Made 17 signposting referrals to other organisations <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>Stats:</p> <ul style="list-style-type: none"> - 21 Unique Members - 22 Meetings Held - 55 New Enquiries <p>The A-Team consistently met bi-monthly in-person. We facilitated sessions around several topical issues for our members to give self-advocacy input, including:</p> <ul style="list-style-type: none"> • Meet and greet with our local MP, Chris Elmore • Meet and greets with our local MS', Huw Iranca Davies and Sarah Murphy 	

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

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

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

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

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

Bridgend Spectrum Support Group (BSSG)

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

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

Stats:

- 57 Unique Members
- 28 Meetings Held

Accessible Information

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

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

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

Stats:

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

Training

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

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

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

Stats:

- 8 Requests Received
- 4 Sessions Delivered
- 20 Attendees

Additional Activities:

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

3. Financial Review

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

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

+ Statutory Independent Professional Advocacy: £32,400

+ Non-Statutory Advocacy: £81,600

We received grant restricted funding from ARC:

+ BSSG Socialisation Funding: £1,500

And a donation from:

+ Swansea University: £1,000

Expenditure

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

- Statutory Independent Professional Advocacy: £26,982

- Non-Statutory Advocacy: £73,432

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

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

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

Our expenditure on the ARC grant funding is as follows:

- BSSG Socialisation Funding: £923

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

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

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

SORP Reference:
Para 1.22

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

<p>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:</p> <ol style="list-style-type: none"> 1. loss of core funding, 2. maintaining staff salaries whilst attempting to secure additional funding, 3. sourcing alternative services or activities for service users, 4. meeting redundancy costs, 5. unplanned but essential expenditure, 6. covering operating costs whilst awaiting receipt of committed funding. <p>The charity will match reserves to these requirements and no more.</p>	
Amount of reserves held.	SORP Reference: Para 1.22
£15,123	
Reasons for holding zero reserves.	SORP Reference: Para 1.22
N/A	
Details of fund materially in deficit.	SORP Reference: Para 1.24
N/A	
Explanation of any uncertainties about the charity continuing as a going concern.	SORP Reference: Para 1.23
The charity's principal sources of funds (including any fundraising)	SORP Reference: Para 1.47
<p>People First Bridgend's primary source of income is through two contracts with Bridgend County Borough Council:</p> <ol style="list-style-type: none"> 1. Specialist Statutory Independent Professional Advocacy for people with learning disabilities and autism 2. Specialist Non-Statutory Advocacy for people with learning disabilities and autism 	
A description of the principal risks facing the charity.	SORP Reference: Para 1.46

See explanation of uncertainties.

Structure, Governance and Management

Type of governing document.	SORP Reference: Para 1.25
Constitution	
How is the charity constituted?	SORP Reference: Para 1.25
Foundation model Charitable Incorporated Organisation (or CIO)	
Trustee selection methods including details of any constitutional provisions.	SORP Reference: Para 1.25
<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

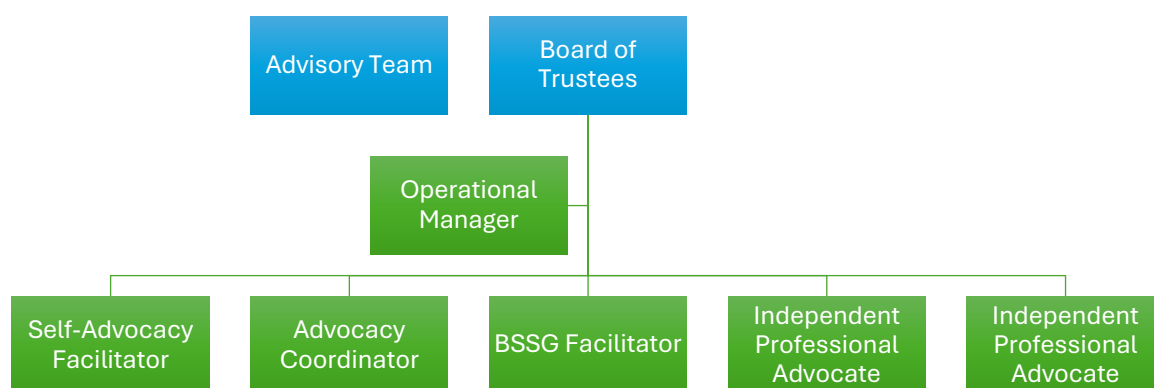
As a foundation CIO, the Board are solely responsible for People First Bridgend. They ensure that decisions relating to its funding and activities are in line with its charitable objectives and support its primary beneficiaries.

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

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

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

People First Bridgend Structure



Reference and Administrative details

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

Names of the charity trustees who manage the charity			
Trustee Name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Jean Gregson	Chair		Board of Trustees
Heather Williams	Trustee		Board of Trustees
Alun Phillips	Trustee		Board of Trustees
Mike Harris	Trustee		Board of Trustees
Ritchie Wood	Trustee	Appointed 25/04/2025	Board of Trustees
Dave Roberts	Trustee	Appointed 11/07/2025	Board of Trustees
Jan Rees	Trustee		Board of Trustees
Name of CEO/most senior staff:		Adam Kurowski Wakeford – Operational Manager	


Other information:

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

Declarations

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

Signed on behalf of the charity's trustees:

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

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

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

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

OBJECTIVES AND ACTIVITIES

Objectives and aims

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

OBJECTIVES AND ACTIVITIES

Activities

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

We support these people to:

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

We do this through several core activities, including:

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- Steering Groups/Away Days
- Consultation work

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

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- Training for professionals and public around learning disability and neurodiversity issues,
- Accessible information translation,
- Participation and representation of learning disability and neurodiversity in a range of networks, forums, steering groups and workstreams at a local and national level.

Public benefit

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

ACHIEVEMENT AND PERFORMANCE

Independent Professional Advocacy (IPA)

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

IPA makes sure people with care and support needs:

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

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

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

Advisory Team Self-Advocacy Group (A-Team)

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

Stats:

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

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

- Meet and greet with our local MP, Chris Elmore
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FINANCIAL REVIEW

Financial position

Income

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

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Reserves policy

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

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

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

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

FINANCIAL REVIEW

Going concern

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

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

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

Recruitment and appointment of new trustees

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

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

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

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

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

Organisational structure

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

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

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

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

PEOPLE FIRST BRIDGEND

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

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

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

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Approved by order of the board of trustees on16/01/2025..... and signed on its behalf by:



.....
Jean Gregson - Trustee

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

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

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2024.

Responsibilities and basis of report

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

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

Independent examiner's statement

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

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

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

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Date:

PEOPLE FIRST BRIDGEND

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

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

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

**BALANCE SHEET
31 MARCH 2024**

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

The financial statements were approved by the Board of Trustees and authorised for issue on16/01/2025..... and were signed on its behalf by:



.....
Jean Gregson - Trustee

The notes form part of these financial statements

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

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

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

Income

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

Expenditure

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

Tangible fixed assets

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

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

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

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

2. INCOME FROM CHARITABLE ACTIVITIES

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

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

3. CHARITABLE ACTIVITIES COSTS

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

4. TRUSTEES' REMUNERATION AND BENEFITS

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

Trustees' expenses

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

5. STAFF COSTS

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

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

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

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

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

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

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

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

7. INDEPENDENT EXAMINERS FEES

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

8. TANGIBLE FIXED ASSETS

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024**9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

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

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

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

11. MOVEMENT IN FUNDS

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

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

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

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

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

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

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

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

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

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

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

11. MOVEMENT IN FUNDS - continued

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

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

Main Projects

Bridgend County Borough Council funding is to:

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

12. RELATED PARTY DISCLOSURES

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

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

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2024

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

OBJECTIVES AND ACTIVITIES

Objectives and aims

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

OBJECTIVES AND ACTIVITIES

Activities

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

We support these people to:

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

We do this through several core activities, including:

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

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

1) Statutory Independent Professional Advocacy:

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

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

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

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

Public benefit

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

ACHIEVEMENT AND PERFORMANCE

Independent Professional Advocacy (IPA)

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

IPA makes sure people with care and support needs:

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

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

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

Advisory Team Self-Advocacy Group (A-Team)

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

Stats:

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

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

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

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

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

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

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

Bridgend Spectrum Support Group (BSSG)

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

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

Stats:

- 57 Unique Members
- 28 Meetings Held

Accessible Information

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

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

Stats:

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

Training

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

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

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

Stats:

- 8 Requests Received
- 4 Sessions Delivered
- 20 Attendees

Additional Activities:

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

FINANCIAL REVIEW

Financial position

Income

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

+ Statutory Independent Professional Advocacy: £32,400

+ Non-Statutory Advocacy: £81,600

We received grant restricted funding from ARC:

+ BSSG Socialisation Funding: £1,500

And a donation from:

+ Swansea University: £1,000

Expenditure

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

- Statutory Independent Professional Advocacy: £26,982

- Non-Statutory Advocacy: £73,432

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

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

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

Our expenditure on the ARC grant funding is as follows:

- BSSG Socialisation Funding: £923

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

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

Reserves policy

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

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

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

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

FINANCIAL REVIEW

Going concern

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

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

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

Recruitment and appointment of new trustees

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

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

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

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

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

Organisational structure

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

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

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

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

PEOPLE FIRST BRIDGEND

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

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

Trustees

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

Independent Examiner

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Approved by order of the board of trustees on16/01/2025..... and signed on its behalf by:



.....
Jean Gregson - Trustee

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

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

I report to the charity trustees on my examination of the accounts of People First Bridgend (the Trust) for the year ended 31 March 2024.

Responsibilities and basis of report

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

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

Independent examiner's statement

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

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

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

J Payne ACA

Graham Paul Limited
Court House
Court Road
Bridgend
CF31 1BE

Date:

PEOPLE FIRST BRIDGEND

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

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

The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

**BALANCE SHEET
31 MARCH 2024**

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

The financial statements were approved by the Board of Trustees and authorised for issue on16/01/2025..... and were signed on its behalf by:



.....
Jean Gregson - Trustee

The notes form part of these financial statements

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

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

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

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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.

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

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

Pension costs and other post-retirement benefits

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

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

2. INCOME FROM CHARITABLE ACTIVITIES

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

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

3. CHARITABLE ACTIVITIES COSTS

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

4. TRUSTEES' REMUNERATION AND BENEFITS

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

Trustees' expenses

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

5. STAFF COSTS

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

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

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

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

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

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

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

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

7. INDEPENDENT EXAMINERS FEES

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

8. TANGIBLE FIXED ASSETS

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

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 MARCH 2024**9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

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

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

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

11. MOVEMENT IN FUNDS

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

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

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

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

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

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

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

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

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

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

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

11. MOVEMENT IN FUNDS - continued

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

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

Main Projects

Bridgend County Borough Council funding is to:

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

12. RELATED PARTY DISCLOSURES

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