

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

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

PEOPLE FIRST BRIDGEND

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FOR THE YEAR ENDED 31 MARCH 2025**

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PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

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

OBJECTIVES AND ACTIVITIES

Objectives and aims

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

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

OBJECTIVES AND ACTIVITIES

Activities

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

We support these people to:

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

We do this through several core activities, including:

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

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

1) Statutory Independent Professional Advocacy:

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

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

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

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

Public benefit

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

ACHIEVEMENTS AND PERFORMANCE

Independent Professional Advocacy (IPA)

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

IPA makes sure people with care and support needs:

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

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

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

Advisory Team Self-Advocacy Group (A-Team)

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

Stats:

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

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

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

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

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

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

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REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

- Regional Accommodation Strategy Launch Event

Bridgend Spectrum Support Group (BSSG)

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

Stats:

- 53 Unique Members
- 35 Meetings Held

Accessible Information

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

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

Training

We ran Learning Disability Awareness and Communication Training for:

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

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

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

FINANCIAL REVIEW

Financial position

Income

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

+ Statutory Independent Professional Advocacy: £32,400

+ Non-Statutory Advocacy: £81,600

We received earned income from:

+ Swansea University : Total - £2,000.

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

And

+ Learning Disability Wales : £250 in April 2024

+ All Wales people First: £250 in Jan 2025

We received a donation from:

+ South Wales Police: £900 in March 2025

Expenditure

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

- Statutory Independent Professional Advocacy: £30,021

- Non-Statutory Advocacy: £85,765

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

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

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

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

We used our Reserves for the following:

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

- £171.99 on music entertainment for the above event.

Principal funding sources

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

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

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

FINANCIAL REVIEW

Reserves policy

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

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

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

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

Amount of reserves held - £50,047

Going concern

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

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

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

Recruitment and appointment of new trustees

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

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

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

When being inducted on the Board, trustees receive:

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

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

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

PEOPLE FIRST BRIDGEND

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

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

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

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

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

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number

1166485

Principal Address

Office 32
Apollo Business Village
Heol Persondy
Aberkenfig
CF32 9RF

Operational Manager

Adam Kurowski Wakeford

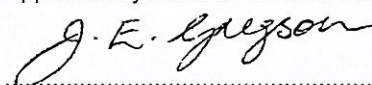
Trustees

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

Independent Examiner

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

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



Jean Gregson - Trustee

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

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

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

Responsibilities and basis of report

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

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

Independent examiner's statement

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

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

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



J Payne ACA

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

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

PEOPLE FIRST BRIDGEND

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 MARCH 2025

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

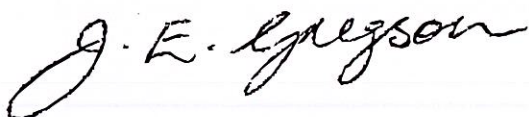
The notes form part of these financial statements

PEOPLE FIRST BRIDGEND

BALANCE SHEET
31 MARCH 2025

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

The financial statements were approved by the Board of Trustees and authorised for issue on12/12/2025..... and were signed on its behalf by:



.....
Jean Gregson - Trustee

The notes form part of these financial statements

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

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

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

Income

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

Expenditure

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

Tangible fixed assets

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

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

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

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

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

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

Pension costs and other post-retirement benefits

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

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

2. INCOME FROM CHARITABLE ACTIVITIES

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

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

3. CHARITABLE ACTIVITIES COSTS

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

4. TRUSTEES' REMUNERATION AND BENEFITS

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

Trustees' expenses

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

5. STAFF COSTS

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

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

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

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

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

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

6. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

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

7. INDEPENDENT EXAMINERS FEES

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

8. TANGIBLE FIXED ASSETS

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

PEOPLE FIRST BRIDGEND

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

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2025	2024
	£	£
Prepayments and accrued income	342	316

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

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

11. MOVEMENT IN FUNDS

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

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

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

11. MOVEMENT IN FUNDS - continued

Comparatives for movement in funds

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

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

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

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

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

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

11. MOVEMENT IN FUNDS - continued

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

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

Main Projects

Bridgend County Borough Council funding is to:

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

12. RELATED PARTY DISCLOSURES

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