

Advocacy West Wales - Eiriolaeth Gorllewin Cymru

England & Wales · Charity number 1172200

Details

Other names ADVOCACY WEST WALES

Status Registered

Legal form CIO

Registered 2017-03-22

Register [View on the Charity Commission register](#)

Contact

Address P A V S
36-38 High Street
Haverfordwest
SA61 2DA

Phone 01437762935

Email admin@advocacywestwales.org.uk

Website www.advocacywestwales.org.uk

Activities

Objects: TO PROMOTE IMPROVED MENTAL HEALTH AND WELL-BEING OF PEOPLE OF ALL AGES LIVING IN WEST WALES, AND THOSE AREAS OF WALES COMMISSIONING ADVOCACY IN PARTNERSHIP WITH COMMISSIONERS IN WEST WALES, THROUGH THE PROVISION OF A RANGE OF SERVICES INCLUDING COMPREHENSIVE INDEPENDENT ADVOCACY, EDUCATION, TRAINING AND AWARENESS RAISING

Activities: To relieve the effects of mental health problems, disadvantage and disengagement amongst those people living in West Wales and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales , through the provision of a comprehensive independent advocacy service.

Classification

- **How:** Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives, Disability, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** Children/young People, Elderly/old People, People With Disabilities

Geography

- Carmarthenshire
- Ceredigion
- Pembrokeshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£146,371	£805,334	£325,064	23
2024-03-31	£737,835	£678,645	£288,685	22
2023-03-31	£932,724	£829,774	£306,094	27
2022-03-31	£73,393	£667,108	£203,145	24
2021-03-31	£52	£516,275	£278,923	21

Trustees

Name	Role	Appointed
ANDREW WATTERS		2017-02-01
Daniel Adam Rosie		2023-09-23
Emlyn Sciavone		2020-03-19
Helen Butland		2017-06-14
Ursula Jane Kelso		2017-02-01

Accounts

Advocacy West Wales — Eiriolaeth Gorllewin Cymru



Advocacy West Wales
Eiriolaeth Gorllewin Cymru
A voice when you need it most
Llais pan fydd ei angen arnoch fwyaf

ANNUAL REPORT 2024 - 2025

Registered Office
Advocacy West Wales—Eiriolaeth
Gorllewin Cymru
36/38 High Street
Haverfordwest
SA61 2DA

Tel/Fax: 01437 762935

Registered Charity No: 1172200

Chair's Report 2024-2025

Last year the AWW Business Plan identified the principal objective for 2024-2025 to be consolidation and team stability after a period of growth and some uncertainty around funding in the previous year. I am glad to report that after significant work by the entire team this has been achieved.

Several new advocates were recruited, with assistance on the panel and the invaluable advice and experience of my fellow Trustee Helen Butland. Improved induction training followed with their integration into the wider team.

With bespoke training from an external consultant there has been further development in the Leadership Team at AWW and this is providing development opportunities as well as greater resilience and sustainability around leadership and supervision.

Thanks go during this year to the considerable work of Office Manager, Sue Blantern, who has worked with new providers to improve our IT and Communications systems, thereby increasing security and IT support as well as achieving budget savings.

Progress has been made in further developing the AWW promotional materials, infomercials and videos and thanks to our Trustee Dan Rosie for being involved in this aspect of AWW life.

AWW-EGC continues to have a leading role in national and regional advocacy networks, with our ongoing Chairship of the Regional Advocacy Strategy Network. This work has enabled advocacy sector providers to come together to challenge issues around funding freezes and pay disparity between the sector and other like professional roles in statutory services, as well as identifying gaps in service provisions such as for people with a learning disability and the neurodivergent community.

Whilst some services have thankfully received increases in funding this year, this has not been the norm. Once of our services continues on the same funding that has been provided since 2012. You will hear from the independent examiner in his report around the tight financial management in place and there is no margin for error and little room for contingencies or to increase capacity. Those issues have been further exacerbated by changing tax regimes.

We are very grateful for our funding from Hywel Dda University Health Board and the 3 local authorities in the region as well as grant awards from The Henry Smith Foundation, The Hywel Davies Trust, The Tudor Trust. This current year we have also welcomed funding from the National Lottery Awards for All and Peoples Postcode Community Trust.

Finally, I would like to pay tribute to my fellow Trustees, who offer me their support and wisdom; Vice Chair Emlyn Schiavone, Helen Butland, Jane Kelso and Dan Rosie. I would also like to thank Carolyn Oakley for her contribution as AWW Treasurer. Carolyn resigned for personal reasons in July and despite advertising we still search for a fitting replacement. If you are reading this, if you value the work of our team, and have a financial background – please raise your hand!



Andrew Watters
Chairperson, AWW-EGC



Total Clients
worked with
2024-2025

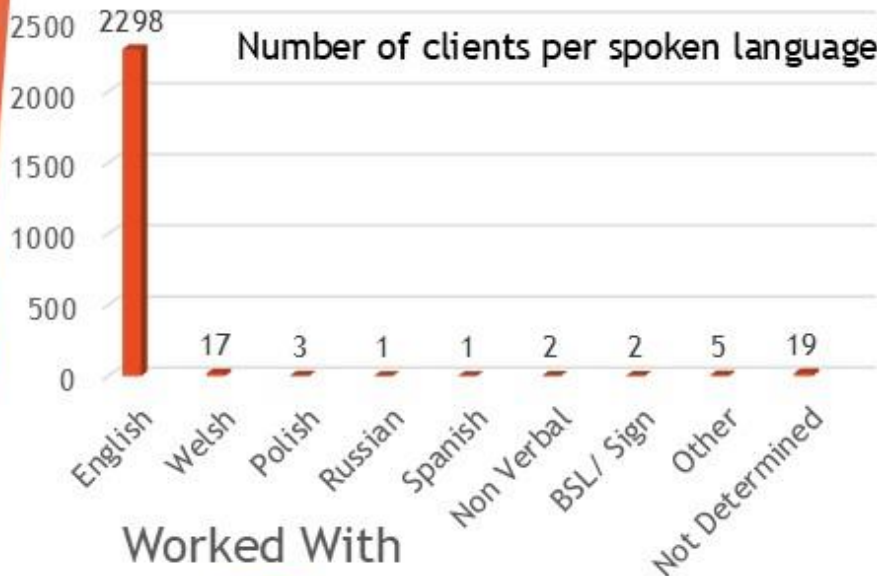
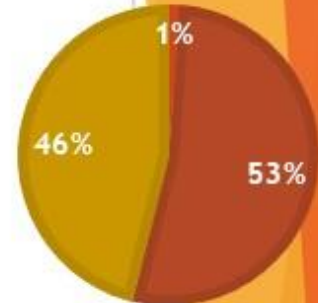
2348



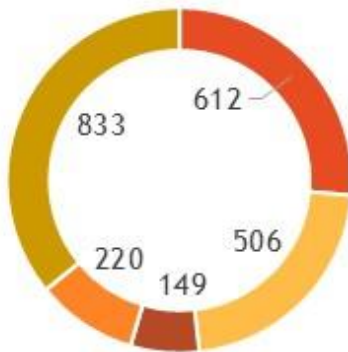
2024-2025

AGE

■ CYP ■ 18-49 yrs ■ 50 yrs +

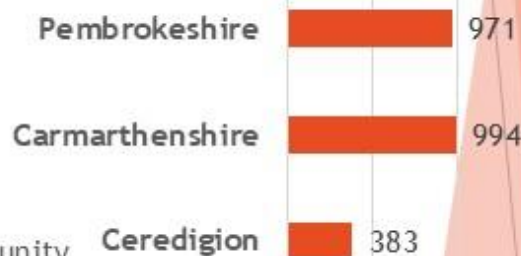


Worked With



■ IMHA ■ 3CIPA ■ LD & ASC ■ Drop in ■ Community

Refs per county



0 500 1000 1500

Top 3 Advocacy Issues per project

IMHA

Medication, Care & Treatment
Mental Health
Access to Health Services

Community

Mental Health
Access to other Services
Access to Health Services

LD & ASC

Accommodation
Finance & Benefits
Care Provision

3CIPA

Care Provision
Accommodation
Access to social
Services

Drop in

Finance & Benefits
Access to Health Services
Accommodation



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working with
AWW

Advocacy West Wales - Reg Charity Number 1172200

Chief Officer's Report 2024-2025

Every year I have started this report saying that we have had a year full of developments and are looking forward to a year of consolidation. Every year has been full of new challenges and developments. However, this year we have firmly opted for a year of consolidation for our services and team. This has included electing not to tender for some new advocacy services, to enable us to focus on building the team and redeveloping some of the existing services after a tough 2022 – 2023.

During this period we achieved:

- Across our services we supported 2348 people during the last year.
- Stability in our advocacy and support team with only 1 round of recruitment early in the period. We are now a team of 23 with only 2 of those not providing some form of advocacy within their roles.
- Armed Forces Covenant – Bronze Employer's Recognition Award
- Bronze Investors in Carers Award
- Real Living Wage Employer Accreditation
- Service review and developments, including review and changes to the Single Point of Contact. This has included increasing audit at the front door of the service and more support in triaging referrals in. The services are in high demand and not all advocacy needs are able to be met. Stirling work has been done to keep our waiting lists at reasonable levels but waiting lists are a consistent factor in a number of our services. When people come to AWW we are often their last resort to avoid crisis, or a hope to prevent deterioration or escalation, and the service is most effective for people when it can answer their need promptly.
- Contract extensions to 2027 in both our Independent Mental Health Advocacy and Community Mental Health Advocacy services across the Hywel Dda University Health Board area.
- Development of our awareness raising materials and work on a new website has continued.
- Ongoing team training including a number of colleagues achieving their Level 4 Independent Advocacy Qualification, and the adoption of the AWW Team Charter.
- Development of our Leadership Team to enable career advancement alongside increasing resilience and sustainability in that team.
- Implementation of developments and modernisation of our IT systems and telecoms, along with annual Cyber Essentials Plus accreditation. The former leading to cost savings. Significant investment in hardware for the team.
- Securing additional funding for our Pembrokeshire service for People with a Learning Disability and Autistic People from Henry Smith Foundation, National Lottery Awards for All and Postcode Community Trust.

Regional Advocacy Strategy Network and Other Networks: We have continued to engage in the regional and national networks to support the development of advocacy through our input, including our training provision, and provide a louder voice for the sector. This has included continuing to work with other advocacy providers to raise the case for adequate funding of advocacy services after years of funding freezes (effective funding cuts). In our capacity as Regional Advocacy Strategy Network Chair we have worked with the Regional Partnership Board on the launch of their Advocacy Strategy and its implementation.

2025-2026 Work Plan for AWW: There are some key areas of focus in this year:

- Further service development including securing ongoing funding for our grant funded services which will see funding end in 2026.
- Improving feedback methods for both the people we support and others
- We continue to work with other advocacy providers around the ongoing funding difficulties in the sector, including advocating for additional funding to meet need, ensure quality and enable our team members to be appropriately rewarded for their work.
- Silver Investors in Carers Award

- Re-accreditation with the Quality Performance Mark for Advocacy Services
- Development of a Wales wide advocacy training module for all health and social care learners and workers.

Challenges in the Advocacy Sector: There has been a crisis in health and social care over recent years and this has continued to impact advocacy services as well as other third sector services. This *primarily* impacts the people we support in terms of their access to appropriate and necessary services, and in terms of them being able to achieve the outcomes they need and are seeking.

As an organisation we have seen the funding for our services frozen or with minimal increase for many years. Recent smaller scale increases in funding from some providers has been welcome but largely consumed by inflationary pressures and, going into this year, the increase in Employers' National Insurance Contributions. That alone will cost this organisation around £17000 this year, even after the increase in the small Employers' Allowance. This is not sustainable. Recent sector engagement with Welsh Government, procurement and commissioners has been received with understanding and acknowledgement of the issues. However, the harsh reality for most services both here and through the Welsh advocacy sector is that they do need to see significant increases in funding around 50% to be sustainable, to avoid reducing service levels, to meet need, and to ensure advocates and other members of our teams are appropriately rewarded for the skills they bring.

As an advocacy employer AWW remains competitive. However, salary levels in the sector are some £14,000-17,000 per year per advocate lower than those in the Welsh government constituted Llais Advocacy body which replaced the local Community Health Councils back in 2022.

During this year we will face difficult budget decisions for the next financial year around maintaining hours within our services, resourcing our services, compliance measures, equipment and facilities. We have sought to maintain our advocacy and support team without losing frontline hours from our services. This year we expect a number of projects to end the year in deficit again and therefore continuing as is won't be possible in the longer term without the introduction of additional financial resource.

Thanks and Acknowledgements: Our Chair Andy Watters has already extended thanks to our funders, supporters, partners and other stakeholders, and I echo that.

Set against the challenges above, my thanks this year are reserved to our team here at AWW, both out on the front-line of advocacy and the support team. Their ongoing dedication, flexibility and expertise is remarkable. Many of our team members and our Trustees bring their lived experience as an integral part of the work they do within the organisation on behalf of the people we support. I look forward to working with the whole team over the next year as we strive to continue to deliver quality, empathic services for those who seek out or rely on our support.

With the very best of wishes to everyone involved with AWW-EGC.



Natasha Fox, Chief Officer



Services delivered 2024-2025

Independent Mental Health Advocacy (IMHA): Statutory Service – Mental Health Act and Mental Health Wales Measure:

This service has been provided since its inception in 2008 by this organisation. 2022 saw the start of a new 3-5 year contract commissioned by Hywel Dda University Health Board with the support of NHS Shared Services Procurement. We have during this period had confirmation of the 2 year extension to 2027. There hasn't been any funding increase since 2008 (save for additional funding when the service was extended to informal/voluntary patients). We await the next tender round in 2026 to see if that changes when the next contract starts in 2027.

During this period we have maintained a full team across the region and continued to receive excellent feedback from clients of the service and professionals around the quality of support. As ever it has been the longer term crisis in health and social care services which has affected our clients' ability to access services they need in a timely way. This has meant long delays in accessing services, obtaining care packages or places in care home or placement settings, and longer stays in hospital as a result.

It is a credit to the team that they have been asked to contribute to health board policy reviews and a new ward based Sexual Safety Charter during this year.

Thank you to them for continuing to meet all advocacy needs through this period.

This year IMHAs have supported 612 people to understand and uphold their legal and human rights, to engage in care and treatment planning, to support their self-advocacy and expression of their views and wishes, to ensure that people lacking capacity are kept at the centre of decision making about issues impacting their lives. There is a near equal representation of male and female clients accessing our IMHA service. 57% of the people we supported were detained under a section of the Mental Health Act, with the other 43% either being informal (in hospital with their consent) or subject to Deprivation of Liberty Safeguards (where they lacked capacity to consent to admission/treatment).

Thanks must go to the dedicated team across AWW-EGC in providing this service and continuing to strongly advocate client views and seek to uphold their rights and entitlements in an increasingly difficult environment in health and social care services.

We continue to work to improve delivery with ongoing training, awareness training to referrers, improvements in outcomes and feedback collation. We led on the development of a regular All Wales IMHA Peer Group which meets every 2 months. This is now well developed and attended and provides a valuable source of support for advocates and their managers from the three providers across Wales.

Three County Independent Professional Advocacy under the Social Services and Wellbeing Act:

This service involves supporting adults facing barriers to getting their views heard, and undergoing social care and support assessment, planning and review, safeguarding processes, and complaint about these. AWW is the lead partner in a 5 partner arrangement including Age Cymru Dyfed, Carmarthenshire People First, Carers Trust Crossroads West Wales and Dewis CIL. The service started 1.4.22 and will run for between 4 and 7 years. This reporting period covers the 3rd year of an initial 4 year contract and at the time of this report a decision is awaited on whether an initial 2 year extension will be approved.

We have had regular contract reviews with the three local authorities who fund this service and positive feedback about the service to citizens, its implementation and development. The partnership has had challenges but has also thrived. The service receives regular referrals. We supported people this year with a range of care and support needs including mental health, learning disability, autism, physical disability, sensory impairment, carers. The service supported a total of 506 people during this year



"thanked me again for visiting and explaining his legal rights and the process and said he wants to be home by the end of the week"

including a significant number of parents within child protection processes.

The service received an uplift in funding of 6.7% during this year to take account of inflationary pressures.

Natasha Fox, Chief Officer, September 2025



"Don't walk behind me;
I may not lead.
Don't walk in front of me;
I may not follow.
Just walk beside me
and be my advocate"

COMMUNITY MENTAL HEALTH ADVOCACY REPORT 2024 - 2024

I am pleased to report the service is in a much more positive position at the close of this reporting year. The service has been rebuilt after a very turbulent time and now stronger and busier than ever.

The service across all 3 counties has been incredibly busy, and we have had to review, equip and develop our Single Point of Contact to be able to manage waiting lists for all three counties. This has been achieved by the continued dedication and hard work of our Project Development Manager Peggy Spooner and her team Jo Davies and Anna Jenkins (CCW). They are fantastic as the first welcoming voice people hear when contacting our service. Due to the demand for the service far outweighing the resource we have put a lot of focus this year on developing the reviewing process of the referrals coming into the service. We try to refer or signpost people on to other services where appropriate as quickly as possible. We are also needing to utilise the drop-in services that run within Pembrokeshire and Carmarthenshire to offer a service to lower-level advocacy needs or provide short term input for more people with more complex advocacy need while they wait to be allocated a 1:1 advocate. As a result of this working well in these counties we are exploring how we incorporate some of these principles within the community service in Ceredigion.

I am very pleased to report we have had very few staff changes, and the community team has remained very stable. This is fantastic for the service as we have a mature team that have a wealth of experience. Within Pembrokeshire we continue to have Kate Roberts and Abi Alexander providing this service who are very experienced and dedicated advocates. Within Carmarthenshire the service continues to be provided by Clare Singelton and Alison Elford. Alison has developed well within her community role and Clare is an extremely experienced advocate. Within Ceredigion we have had one staff change. Last summer Emma Singh left AWW and we welcomed Robert Philips into the community role from IMHA. He has been keen to be as effective across the rural county. This year we worked to split Ceredigion into north and south areas for allocation as far as is possible. Robert covers the South and Ceridwen who is also very experienced covers the North of the county.

Throughout the year we have had several children / young people referrals and continue to action these as quickly as we possibly can. Ceridwen has carried out some awareness raising for the children and young people service in Ceredigion.

Our staff team remains our greatest strength, and I am very grateful for all the hard work our advocates and client caseworkers have put in over the last year.

Work carried out across the 3 counties from April – March

We have worked with 833 clients in this time, with 555 of these being new referrals. This is significantly higher than last year. Last year we recorded working with a total of 692 clients, 492 of which were new referrals across the three counties.

We have supported more women (61%) than males (38%). 0.7% of the people we worked with identify as non-binary and 0.3% other.



"Thank you for your help over the last couple of days you have been amazing"

Pembrokeshire – new referrals: 249	Total clients worked with: 356
Carmarthenshire – New referrals: 180	Total clients worked with: 266
Ceredigion – New referrals: 126	Total clients worked with: 208

Carmarthenshire Tudor Trust Drop-in Service

We are grateful to our funders Tudor Trust for their extension to enable us to keep this service running for another three years from April 2023. Our drop in advocate Sue Williams has continued to deliver drop-ins in Ammanford, Carmarthen and Llanelli. She has also reached out, engaging with services for surgeries within the Gwendraeth Valley and also attending outreach events held by connecting Carmarthenshire. This has been a valuable environment to continue to raise awareness of the drop-in service along with all other services AWW provides. A big thank you to Sue for her continuous hard work.

During the end of this reporting period, we had to plan for Sue reducing her hours. As a result, Alison Elford now delivers the Llanelli drop in. This is working well as she is an experienced drop in and community advocate so no disruption to delivery was experienced.

Pembrokeshire Hywel Davies Trust Drop-In Service

Kate and Abi, deliver the Haverfordwest Drop-in service alternative weeks. However, the location of the Haverfordwest drop in did change. The VC gallery had been a very good home for some time but

unfortunately, they experienced water damage and needed to close for some time. We explored several options but to help support advocates to have easy access to internet, workspace and a private room to see people in we moved the drop into PAVS. This has been working well. Our Tenby and Pembroke Dock drop ins have experienced a couple of staff changes. We initially had Debbie Haughey join the team to deliver this service. However, when she left, we were very pleased to welcome Rebecca Arnold as our drop in advocate once a week. Rebecca has a wide range of experience as she was initially a Pembrokeshire community advocate years ago until she moved across to the IMHA service. It has been good to welcome her back with her wealth of experience.

Kate Bailey - Assistant Manager

Pembrokeshire Service for People with a Learning Disability and Autistic People 2024—2025

It has been a year of development for the service. With the Henry Smith Project funding coming to an end we had to consider how to attract new funding streams to sustain the service.

Following consultation with local service user groups and services we developed a plan for a new Learning disability and Autism drop-in service that could improve and create accessibility for individuals in Pembrokeshire.

We were fortunate to be successful in two separate funding bids for this service which formally commenced in April of this year. The drop-in service is now established in three locations across Pembrokeshire and has been met with a very positive reaction.

Individuals supported in the first quarter this year has increased by 27% in comparison to the same period last year. We can therefore be assured that the model is working and that more people are able to reach us for advocacy support than before.

Following news of these two new grants we were also fortunate that Henry Smith decided to extend the community funding for a further year. This will take the project to the end of 2026 and enable us time to continue to highlight the need for this to be brought into a statutory advocacy offer or to attract rare grant funding to preserve the service into the future.

Shelly Newton, Project Manager



"if you didn't speak
up for me they
wouldn't have
listened"



"Without your support I
very likely would not be
here. Thank you so much. I
meant it. You got me out of
a massive hole" "You've
been incredible"

"Amazing support!"

Trustees

Andy Watters, Chair

Carolyn Oakley, Treasurer (*resigned July 24*)

Jane Kelso, Trustee

Helen Butland, Trustee

Emlyn Schiavone, Vice-Chair

Dan Rosie

Ajay Owen (*Sept 24-May 25*)

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Staff Team

Natasha Fox, Chief Officer

Kate Bailey, Deputy Manager

Sue Blanter, Office Manager/Administrator

Nia Williams, Professional Lead/IMHA,
Carmarthenshire

Sarah Thomas, IMHA, Carmarthenshire

Sue Williams, Drop in service Advocate

Rebecca Arnold, IMHA Carmarthenshire/
Drop In Advocate

Clare Singleton, Community Advocate,
Carmarthenshire

Peggy Spooner, Project Development
Manager

Elaine Lewis, Independent Advocate,
Carmarthenshire

Kate Roberts, Community Advocate,
Pembrokeshire

Shelly Newton, LD & AP Advocate

Ceridwen Kabir, Community Advocate
Ceredigion

Natalie Sen, IMHA/3CIPA Advocate

Abi Alexander, Independent Advocate

Joanne Davies, Client Caseworker

Rachel Dillon, LD & AP Advocate

Brigit Thurstan, Finance Officer

Alison Elford, Independent Advocate

Daryl Jones, Independent Advocate

Greg Williams, Independent Advocate
(*resigned May 24*)

Robert Phillips, Independent Advocate

Kelly Woodrow, Independent Advocate (*from
June 24*)

Debbie Haughey, CCW/Drop in Advocate
(*resigned December 24*)

Anna Jenkins, Client Caseworker (*from June
24*)



With thanks to our Funders



the
Tudortrust

Hywel Davies Trust





Advocacy West Wales
Eiriolaeth Gorllewin Cymru

A voice when you need it most
Llais pan fydd ei angen arnoch fwyaf

CHARITY REGISTRATION NUMBER: 1172200

**REPORTS AND FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025
FOR
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited
Chartered Certified Accountants
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
FINANCIAL STATEMENTS
for the year ended 31 March 2025

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ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2025

Structure, Governance and Management

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

History

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

Objectives and activities for the public benefit

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) Providing independent advocacy services for adults with a range of needs for care and support, and people of all ages with mental health needs, and people with a learning disability and autistic people, supporting self-advocacy and providing self-advocacy workshops.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2025

Achievements and Performance

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
- Independent Professional Advocacy in Carmarthenshire, Ceredigion and Pembrokeshire
- Tudor Trust Drop In Services Carmarthenshire ongoing
- All ages Community Mental Health, Carmarthenshire, Ceredigion and Pembrokeshire
- Hywel Davies Drop-in Services in Pembrokeshire - June 2022 and ongoing
- Adults with a learning disability or autism in Pembrokeshire

Financial Review

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Welsh Government, Tudor Trust, Hywel Davies Trust, Henry Smith Charity, Pembrokeshire CC, Carmarthenshire CC, Ceredigion CC, National Lottery Awards for All, Postcode Community Trust.

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £841,713

Reserves Policy

The current policy is to hold reserves equivalent to:

3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £129,548 and restricted reserves amounted to £195,516.

Future Developments

We will be looking to secure future funding for Drop In services and people with a learning disability and autistic people services from 2026.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2025

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

.....
A Watters, Chairperson

Date:

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2025

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2023.

REFERENCE & ADMINISTRATIVE DETAILS

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

Andy Watters	Chair
Carolyn Oakley	Treasurer (resigned 08/07/24)
Jane Kelso	
Helen Butland	
Emlyn Sciavone	
Daniel Rosie	
Ajay Chance Owen	September 2024 - May 2025

Accountants L M Griffiths & Co Ltd
Chartered Certified Accountants
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers CAF Bank Ltd
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU

31 March 2025

Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru

I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (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 come across no other matters in connection with the examination to which attention should be drawn in this report to enable a proper understanding of the accounts to be reached.

Michael Harries FCCA
L M Griffiths & Co Ltd
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
STATEMENT OF FINANCIAL ACTIVITIES
for the year ended 31 March 2025

	Notes	Unrestricted funds	Designated & Restricted funds	Total funds 2025	Total funds 2024
		£	£	£	£
INCOMING RESOURCES					
Incoming resources from generated funds:					
Voluntary income	3	3,508	833,337	836,845	733,287
Investment income	4	4,868	-	4,868	4,548
Incoming resources from charitable activities:					
Grants & contracts	5	-	-	-	-
Total incoming resources		<u>8,376</u>	<u>833,337</u>	<u>841,713</u>	<u>737,835</u>
RESOURCES EXPENDED					
	15				
Charitable activities		<u>77,638</u>	<u>727,696</u>	<u>805,334</u>	<u>755,244</u>
Total resources expended		<u>77,638</u>	<u>727,696</u>	<u>805,334</u>	<u>755,244</u>
NET INCOMING RESOURCES before transfers		(69,262)	105,641	36,379	(17,409)
Gross transfers between funds	12&13	<u>68,999</u>	<u>(68,999)</u>	<u>-</u>	<u>-</u>
Net incoming /(outgoing) resources		<u>(263)</u>	<u>36,642</u>	<u>36,379</u>	<u>(17,409)</u>
RECONCILIATION OF FUNDS					
Funds brought forward		129,811	158,874	288,685	306,094
TOTAL FUNDS CARRIED FORWARD	12	<u>129,548</u>	<u>195,516</u>	<u>325,064</u>	<u>288,685</u>

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
BALANCE SHEET
As at 31 March 2025

	Notes	Unrestricted funds	Restricted income funds	Total this year 2025	Total last year 2024
		£	£	£	£
FIXED ASSETS					
Tangible assets	9	855	4,843	5,698	525
		855	4,843	5,698	525
CURRENT ASSETS					
Debtors : Amounts falling due within one year	10	-	-	-	-
Cash at bank and in hand		128,343	208,563	336,906	308,928
		128,343	208,563	336,906	308,928
CREDITORS					
Amounts falling due within one year	11	-	17,540	17,540	20,768
NET CURRENT ASSETS		128,343	191,023	319,366	288,160
TOTAL ASSETS LESS CURRENT LIABILITIES		129,198	195,866	325,064	288,685
FUNDS	12				
Unrestricted funds		129,548	-	129,548	129,811
Restricted funds		-	195,516	195,516	158,874
TOTAL FUNDS		129,548	195,516	325,064	288,685

The financial statements were approved by the trustees on _____ and were signed on its behalf by:

A Watters, Chair

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

1 Basis of preparation

1.1 Basis of accounting

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.

1.2 Change in basis of accounting

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

1.3 Changes to previous accounts

No changes have been made to accounts for previous years.

2 Accounting policies

2.1 Incoming resources

Recognition of incoming resources

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

Incoming resources with related expenditure

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

Grants and donations

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

Tax reclaims on donations and gifts

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

Contractual income and performance related grants

This is only included in the SoFA once the related goods or services have been delivered.

Gifts in kind

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

Donated services and facilities

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

Volunteer help

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

Investment income

This is included in the accounts when receivable.

Investment gains and losses

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

2.2 Expenditure & liabilities

Liability recognition

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

Governance costs

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

2.3 Assets

Tangible fixed assets for use by charity

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt.

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

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

3 VOLUNTARY INCOME	2025			2024
	Designated			
	Unrestricted Funds	& Restricted Funds	Total	Total
	£	£	£	£
Other income	3,508	-	3,508	92
	3,508	-	3,508	92

4 INVESTMENT INCOME	2025	2024
	£	£
Deposit account interest	4,868	4,548

5 GRANTS & CONTRACTS	2025			2024
	Designated			
	Unrestricted Funds	& Restricted Funds	Total	Total
	£	£	£	£
Community	-	238,141	238,141	73,812
Community C	-	-	-	91,753
Community Ceredigion	-	-	-	50,084
Henry Smith	-	105,000	105,000	60,000
IMHA	-	197,250	197,250	197,250
CIPA	-	262,946	262,946	228,296
Tudor	-	30,000	30,000	32,000
Hywel Davies Trust	-	-	-	-
	-	833,337	833,337	733,195

6 NET INCOMING/(OUTGOING) RESOURCES	2025	2024
	£	£
Net resources are stated after charging:		
Accountancy fees	1,500	1,452
Depreciation	3,401	2,117

7 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.

	2025	2024
	£	£
Trustees' expenses	-	-
Number of trustees receiving expenses	-	-

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

8 STAFF COSTS		2025	2024
		£	£
Wages and salaries		589,477	545,578
The average monthly number of employees during the year was as follows:		2025	2024
Full time (based on 30 hours per week)		13	13
Part time		10	9
		23	22
There were no employees with salaries in excess of £60,000			
9 TANGIBLE FIXED ASSETS			
	Fixtures and fittings £	Computer equipment £	Total £
COST			
At 1 April 2024	1,190	27,713	28,903
Additions	-	8,575	8,575
At 31 March 2025	1,190	36,288	37,478
DEPRECIATION			
At 1 April 2024	1,190	27,188	28,378
Charge for year	-	3,401	3,401
At 31 March 2025	1,190	30,589	31,779
NET BOOK VALUE			
At 31 March 2025	-	5,699	5,699
At 31 March 2024	-	525	525
10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR		2025	2024
		£	£
Amounts falling due within one year:		-	-
		-	-
11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR		2025	2024
		£	£
Accruals		1,500	1,452
Other creditors		16,040	19,316
		17,540	20,768

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

12 MOVEMENT IN FUNDS

	At 01.04.24	Funds brought forward at 01.04.24 £	Net movement in funds £	Transfers between funds £	At 31.03.25 £
Unrestricted funds					
General fund	-	129,811	(69,262)	68,999	129,548
Restricted funds					
Restricted income funds	-	158,874	105,641	(68,999)	195,516
TOTAL FUNDS	-	288,685	36,379	-	325,064

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	8,376	77,638	(69,262)
Restricted funds			
Restricted income funds	833,337	727,696	105,641
TOTAL FUNDS	841,713	805,334	36,379

13 TRANSFERS BETWEEN FUNDS

Transfers were made from CIPA, Community, Tudor Trust, Henry Smith, Hywel Davies and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

14 FUND DEFICITS

As at the year end 31 March 2025, no funds were in a deficit position

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted		Restricted Funds							2025	2024
	<u>Reserves</u>	<u>Community</u>	<u>Community</u>	<u>Community-</u>	<u>IMHA</u>	<u>Henry Smith</u>	<u>Hywel</u>	<u>CIPA</u>	<u>Tudor</u>	<u>Total funds</u>	<u>Total funds</u>
	£	£	Carms £	Ceredigion	£		Trust	£	£	£	£
INCOMING RESOURCES											
Voluntary & other income	3,508							2,995		6,503	92
Government Grants	-	238,141			197,250	105,000	-	259,951	30,000	830,342	733,195
Investment income	4,868	-			-	-	-	-	-	4,868	4,548
Total incoming resources	8,376	238,141	-	-	197,250	105,000	-	262,946	30,000	841,713	737,835
RESOURCES EXPENDED											
Charitable activities											
Salaries & wages	55,734	174,935			146,591	44,820	17,266	74,498	24,264	538,108	491,885
Partnerships								134,640		134,640	133,873
Travel expenses	269	6,653			5,289	502	1,133	3,508	860	18,214	16,770
Training / Recruitment	1,200	75			225			15	15	1,530	1,572
CRB Checks	67	266			108			13	58	512	326
Subscriptions	164									164	200
	57,434	181,929	-	-	152,213	45,322	18,399	212,674	25,197	693,168	644,626
Support costs											
Salaries & wages	511	14,534			12,038	5,187	1,221	16,047	1,831	51,369	53,693
Training										-	993
Rent & rates	4,425	3,354			3,500	1,260	1,365	1,680	403	15,987	15,674
Room hire	25	403			98	18	7	157	9	717	835
Insurance	3,892	1,008			860			465		6,225	5,441
Telephone	888	3,071			2,703	1,023	464	1,482	594	10,225	13,069
Postage, stationery & advertising	230	294			168	48	20	160	83	1,003	980
Website & computing costs	2,997	4,171			3,588	1,162	414	2,167	328	14,827	7,689
Equipment	36	138			5			13		192	496
Access to work										-	66
Sundries										-	8
Professional fees	3,283	778			662	215	83	328	110	5,459	6,914
Bank charges	60									60	60
AGM/Staff welfare	1,155	16			5	25				1,201	1,131
Accountancy	1,500									1,500	1,452
Trustees' expenses										-	-
Depreciation	1,202				823	135	1,241			3,401	2,117
	20,204	27,767	-	-	24,450	9,073	4,815	22,499	3,358	112,166	110,618
Total resources expended	77,638	209,696	-	-	176,663	54,395	23,214	235,173	28,555	805,334	755,244
NET INCOMING/OUTGOING RESOURCES before transfers	(69,262)	28,445	-	-	20,587	50,605	(23,214)	27,773	1,445	36,379	(17,409)
Gross transfers between funds	68,999	(6,670)	(13,428)	(3,716)	(23,670)	(6,000)	(3,958)	(8,557)	(3,000)	-	-
Net incoming/(outgoing) resources	-	-	-					-		36,379	(17,409)
Funds brought forward	129,811	28,565	13,428	3,716	24,359	3,033	75,347	7,156	3,270	288,685	306,094
Funds carried forward	129,548	50,340	-	-	21,276	47,638	48,175	26,372	1,715	325,064	288,685

CHARITY REGISTRATION NUMBER: 1172200

**REPORTS AND FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2025
FOR
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited
Chartered Certified Accountants
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
FINANCIAL STATEMENTS
for the year ended 31 March 2025

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ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2025

Structure, Governance and Management

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

History

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

Objectives and activities for the public benefit

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) Providing independent advocacy services for adults with a range of needs for care and support, and people of all ages with mental health needs, and people with a learning disability and autistic people, supporting self-advocacy and providing self-advocacy workshops.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2025

Achievements and Performance

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
- Independent Professional Advocacy in Carmarthenshire, Ceredigion and Pembrokeshire
- Tudor Trust Drop In Services Carmarthenshire ongoing
- All ages Community Mental Health, Carmarthenshire, Ceredigion and Pembrokeshire
- Hywel Davies Drop-in Services in Pembrokeshire - June 2022 and ongoing
- Adults with a learning disability or autism in Pembrokeshire

Financial Review

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Welsh Government, Tudor Trust, Hywel Davies Trust, Henry Smith Charity, Pembrokeshire CC, Carmarthenshire CC, Ceredigion CC, National Lottery Awards for All, Postcode Community Trust.

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £841,713

Reserves Policy

The current policy is to hold reserves equivalent to:

3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £129,548 and restricted reserves amounted to £195,516.

Future Developments

We will be looking to secure future funding for Drop In services and people with a learning disability and autistic people services from 2026.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2025

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

.....
A Watters, Chairperson

Date:

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2025

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2023.

REFERENCE & ADMINISTRATIVE DETAILS

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

Andy Watters	Chair
Carolyn Oakley	Treasurer (resigned 08/07/24)
Jane Kelso	
Helen Butland	
Emlyn Sciavone	
Daniel Rosie	
Ajay Chance Owen	September 2024 - May 2025

Accountants L M Griffiths & Co Ltd
Chartered Certified Accountants
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers CAF Bank Ltd
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU

31 March 2025

Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru

I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (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 come across no other matters in connection with the examination to which attention should be drawn in this report to enable a proper understanding of the accounts to be reached.

Michael Harries FCCA
L M Griffiths & Co Ltd
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
STATEMENT OF FINANCIAL ACTIVITIES
for the year ended 31 March 2025

	Notes	Unrestricted funds £	Designated & Restricted funds £	Total funds 2025 £	Total funds 2024 £
INCOMING RESOURCES					
Incoming resources from generated funds:					
Voluntary income	3	3,508	833,337	836,845	733,287
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Charitable activities		77,638	727,696	805,334	755,244
Total resources expended		77,638	727,696	805,334	755,244
NET INCOMING RESOURCES before transfers		(69,262)	105,641	36,379	(17,409)
Gross transfers between funds	12&13	68,999	(68,999)	-	-
Net incoming /(outgoing) resources		(263)	36,642	36,379	(17,409)
RECONCILIATION OF FUNDS					
Funds brought forward		129,811	158,874	288,685	306,094
TOTAL FUNDS CARRIED FORWARD	12	129,548	195,516	325,064	288,685

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
BALANCE SHEET
As at 31 March 2025

	Notes	Unrestricted funds	Restricted income funds	Total this year 2025	Total last year 2024
		£	£	£	£
FIXED ASSETS					
Tangible assets	9	855	4,843	5,698	525
		855	4,843	5,698	525
CURRENT ASSETS					
Debtors : Amounts falling due within one year	10	-	-	-	-
Cash at bank and in hand		128,343	208,563	336,906	308,928
		128,343	208,563	336,906	308,928
CREDITORS					
Amounts falling due within one year	11	-	17,540	17,540	20,768
NET CURRENT ASSETS		128,343	191,023	319,366	288,160
TOTAL ASSETS LESS CURRENT LIABILITIES		129,198	195,866	325,064	288,685
FUNDS	12				
Unrestricted funds		129,548	-	129,548	129,811
Restricted funds		-	195,516	195,516	158,874
TOTAL FUNDS		129,548	195,516	325,064	288,685

The financial statements were approved by the trustees on _____ and were signed on its behalf by:

A Watters, Chair

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

1 Basis of preparation

1.1 Basis of accounting

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.

1.2 Change in basis of accounting

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

1.3 Changes to previous accounts

No changes have been made to accounts for previous years.

2 Accounting policies

2.1 Incoming resources

Recognition of incoming resources

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

Incoming resources with related expenditure

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

Grants and donations

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

Tax reclaims on donations and gifts

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

Contractual income and performance related grants

This is only included in the SoFA once the related goods or services have been delivered.

Gifts in kind

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

Donated services and facilities

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

Volunteer help

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

Investment income

This is included in the accounts when receivable.

Investment gains and losses

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

2.2 Expenditure & liabilities

Liability recognition

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

Governance costs

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

2.3 Assets

Tangible fixed assets for use by charity

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt.

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

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

3 VOLUNTARY INCOME	2025			2024
	Designated			Total
	Unrestricted Funds	& Restricted Funds	Total	
	£	£	£	
Other income	3,508	-	3,508	92
	3,508	-	3,508	92

4 INVESTMENT INCOME	2025	2024
	£	£
Deposit account interest	4,868	4,548

5 GRANTS & CONTRACTS	2025			2024
	Designated			Total
	Unrestricted Funds	& Restricted Funds	Total	
	£	£	£	
Community	-	238,141	238,141	73,812
Community C	-	-	-	91,753
Community Ceredigion	-	-	-	50,084
Henry Smith	-	105,000	105,000	60,000
IMHA	-	197,250	197,250	197,250
CIPA	-	262,946	262,946	228,296
Tudor	-	30,000	30,000	32,000
Hywel Davies Trust	-	-	-	-
	-	833,337	833,337	733,195

6 NET INCOMING/(OUTGOING) RESOURCES	2025	2024
	£	£
Net resources are stated after charging:		
Accountancy fees	1,500	1,452
Depreciation	3,401	2,117

7 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.

	2025	2024
	£	£
Trustees' expenses	-	-
Number of trustees receiving expenses	-	-

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

8 STAFF COSTS		2025	2024
		£	£
Wages and salaries		589,477	545,578
The average monthly number of employees during the year was as follows:		2025	2024
Full time (based on 30 hours per week)		13	13
Part time		10	9
		23	22
There were no employees with salaries in excess of £60,000			
9 TANGIBLE FIXED ASSETS			
	Fixtures and fittings £	Computer equipment £	Total £
COST			
At 1 April 2024	1,190	27,713	28,903
Additions	-	8,575	8,575
At 31 March 2025	1,190	36,288	37,478
DEPRECIATION			
At 1 April 2024	1,190	27,188	28,378
Charge for year	-	3,401	3,401
At 31 March 2025	1,190	30,589	31,779
NET BOOK VALUE			
At 31 March 2025	-	5,699	5,699
At 31 March 2024	-	525	525
10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR		2025	2024
		£	£
Amounts falling due within one year:		-	-
		-	-
11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR		2025	2024
		£	£
Accruals		1,500	1,452
Other creditors		16,040	19,316
		17,540	20,768

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

12 MOVEMENT IN FUNDS

	At 01.04.24	Funds brought forward at 01.04.24 £	Net movement in funds £	Transfers between funds £	At 31.03.25 £
Unrestricted funds					
General fund	-	129,811	(69,262)	68,999	129,548
Restricted funds					
Restricted income funds	-	158,874	105,641	(68,999)	195,516
TOTAL FUNDS	-	288,685	36,379	-	325,064

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	8,376	77,638	(69,262)
Restricted funds			
Restricted income funds	833,337	727,696	105,641
TOTAL FUNDS	841,713	805,334	36,379

13 TRANSFERS BETWEEN FUNDS

Transfers were made from CIPA, Community, Tudor Trust, Henry Smith, Hywel Davies and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

14 FUND DEFICITS

As at the year end 31 March 2025, no funds were in a deficit position

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2025

15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted	Restricted Funds								2025	2024
			Community	Community-			Hywel				
	Reserves	Community	Carms	Ceredigion	IMHA	Henry Smith	Davies	CIPA	Tudor	Total funds	Total funds
	£	£	£		£		Trust	£	£	£	£
INCOMING RESOURCES											
Voluntary & other income	3,508							2,995		6,503	92
Government Grants	-	238,141			197,250	105,000	-	259,951	30,000	830,342	733,195
Investment income	4,868	-			-	-	-	-	-	4,868	4,548
Total incoming resources	8,376	238,141	-	-	197,250	105,000	-	262,946	30,000	841,713	737,835
RESOURCES EXPENDED											
Charitable activities											
Salaries & wages	55,734	174,935			146,591	44,820	17,266	74,498	24,264	538,108	491,885
Partnerships								134,640		134,640	133,873
Travel expenses	269	6,653			5,289	502	1,133	3,508	860	18,214	16,770
Training / Recruitment	1,200	75			225			15	15	1,530	1,572
CRB Checks	67	266			108			13	58	512	326
Subscriptions	164									164	200
	57,434	181,929	-	-	152,213	45,322	18,399	212,674	25,197	693,168	644,626
Support costs											
Salaries & wages	511	14,534			12,038	5,187	1,221	16,047	1,831	51,369	53,693
Training										-	993
Rent & rates	4,425	3,354			3,500	1,260	1,365	1,680	403	15,987	15,674
Room hire	25	403			98	18	7	157	9	717	835
Insurance	3,892	1,008			860			465		6,225	5,441
Telephone	888	3,071			2,703	1,023	464	1,482	594	10,225	13,069
Postage, stationery & advertising	230	294			168	48	20	160	83	1,003	980
Website & computing costs	2,997	4,171			3,588	1,162	414	2,167	328	14,827	7,689
Equipment	36	138			5			13		192	496
Access to work										-	66
Sundries										-	8
Professional fees	3,283	778			662	215	83	328	110	5,459	6,914
Bank charges	60									60	60
AGM/Staff welfare	1,155	16			5	25				1,201	1,131
Accountancy	1,500									1,500	1,452
Trustees' expenses										-	-
Depreciation	1,202				823	135	1,241			3,401	2,117
	20,204	27,767	-	-	24,450	9,073	4,815	22,499	3,358	112,166	110,618
Total resources expended	77,638	209,696	-	-	176,663	54,395	23,214	235,173	28,555	805,334	755,244
NET INCOMING/OUTGOING RESOURCES before transfers	(69,262)	28,445	-	-	20,587	50,605	(23,214)	27,773	1,445	36,379	(17,409)
Gross transfers between funds	68,999	(6,670)	(13,428)	(3,716)	(23,670)	(6,000)	(3,958)	(8,557)	(3,000)	-	-
Net incoming/(outgoing) resources	-	-	-					-		36,379	(17,409)
Funds brought forward	129,811	28,565	13,428	3,716	24,359	3,033	75,347	7,156	3,270	288,685	306,094
Funds carried forward	129,548	50,340	-	-	21,276	47,638	48,175	26,372	1,715	325,064	288,685

Accounts

Advocacy West Wales — Eiriolaeth Gorllewin Cymru



Advocacy West Wales
Eiriolaeth Gorllewin Cymru
A voice when you need it most
Llais pan fydd ei angen arnoch fwyaf

ANNUAL REPORT 2023 - 2024

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Chair's Report 2023-2024

My report for the last financial year, 2022/23 concluded with a description of the impact of the long delay in finalising the outcome of a tender to provide the Community Mental Health Advocacy Service, eventually announced in June 2023.

The uncertainty this brought continued to impact on the organisation and its team members through to the autumn of this reporting year and was a very unsettling time for the team, whether their roles were directly under threat or not. Several members of the team left for more secure opportunities and those remaining worked over and beyond their contracts in order to meet the needs of our clients and the continuing demands of the service. The Chief Officer and the Management Team worked hard to support the advocates workload and morale. As usual in any crisis there are also unsung heroes who provide emotional support and stability to their colleagues by working alongside them and I would like to acknowledge their hidden contribution.

This year a number of new team members of a high calibre have been recruited and their induction and training are continuing. I hope that this time next year the Chairperson will be able to report that AWW and its team has fully recovered and remains the lead advocacy provider in West Wales.



The income from most contracts has not changed for many years, 15 years in some instances. Natasha Fox, in her role as AWW Chief Officer and Chairperson of the Regional Advocacy Strategy Network, is working with other managers of advocacy services on a joint approach to funders, commissioners and Welsh Government to advocate for uplifts in funding to ensure sustainability of advocacy services. In the meantime, we have to thank several independent trusts such as Henry Smith, Tudor Trust and Hywel Davies for their generous grants to fill gaps in the statutory services.

Our advocates are supported on the front line with a complex infrastructure of procedures and equipment to ensure not only that they are paid, but that they have the necessary information and equipment to do their job. Ensuring this is another “unsung hero”, our Office Manager, Sue Blanter, who I hope will not be insulted if I use the analogy of a swan:- composed on the surface, but working hard to manage the changing environment and shifting currents of requirements such as Cyber Essentials.

The cost and complexity of complying with these requirements and those of the Quality Performance Mark has increased several times over during the life of the contracts against a backdrop of static funding. Yet it is imperative that we maintain these accreditations especially in terms of any that assist us to preserve the highest standards and the most confidential of information we hold on behalf of clients of our services.

I would like to acknowledge the contribution of my fellow trustees who despite the demands of events in their personal lives, continue to give their time and wisdom to keep AWW “on course” and fulfilling its charitable purpose: Vice Chair Emlyn Schiavone who helped steer Eiriol through the amalgamation with AWW and has long experience of public service; Treasurer Carolyn Oakley who interprets the information on our financial health into language that people like myself can understand; Jane Kelso, one time Chairperson and stalwart supporter of AWW who has helped the organisation through some turbulent times; Helen Butland who regularly uses her people skills to interview potential employees and has been very busy over the past year. With respect to my colleagues, I have to recognise that most of us are of an age when calculators and accounting machines were the height of technology, so we were pleased to welcome Dan Rosie to the board last year and he is helping us move forward by working alongside the

management team to update our website and social media interaction. Although outside the scope of this annual report, we have recently been joined by another trustee, Ajay Owen, who I hope, along with Dan and Helen, will see AWW into the next decade.

On looking back on the 10 years I have been a trustee of AWW, my colleagues and I have experienced some turbulent and threatening times for the organisation, but two people have been steadfast and visionary in overcoming those problems:- The Chief Officer, Natasha Fox, and Assistant Manager, Kate Bailey. Their advice to trustees, and to me as Chairperson, has been crucial to the current success of AWW and the high regard it is held in by clients, commissioners and other professionals across Wales.



Andrew Watters
Chairperson, AWW-EGC

Chief Officer's Report April 2023-March 2024

Every year I have started this report saying that we have had a year full of developments and are looking forward to a year of consolidation. Every year has been full of new challenges and developments. However, this year we have firmly opted for a year of consolidation for our services and team. This has included electing not to tender for some new advocacy services, to enable us to focus on building the team and redeveloping some of the existing services after a tough 2022 – 2023.

At the time of writing we have achieved:

- Attainment of the Quality Performance Mark for Advocacy Services for the 4th time.
- Recruiting to maintain a full team following last year's losses.
- Service review and developments, including review and changes to the Single Point of Contact, ongoing team training and the roll out of the AWW Team Charter.
- Planning around the development and modernisation of our IT systems and telecoms, along with annual Cyber Essentials Plus accreditation.



With regards to the latter, thanks must go to our Office Manager Sue Blatern for her tireless research, planning and implementation in moving this piece of work forward and achieving what we believe will be a more sustainable and secure set of systems for the future.

Achievements in Securing Funding: We were able to achieve further progress in terms of securing funding for existing and new services during this reporting period with the successful outcome of the Community Mental Health Advocacy Service tender across all three counties. See the separate report from Kate Bailey in relation to that service.

Regional Advocacy Strategy Network and Other Networks: We have continued to engage in the regional and national networks to support the development of advocacy through our input, including our training provision, and provide a louder voice for the sector. This has included continuing to work with other advocacy providers to raise the case for adequate funding of advocacy services after years of funding freezes (effective funding cuts). In our capacity as Regional Advocacy Strategy Network Chair we have worked with the Regional Partnership Board on the launch of their Advocacy Strategy and its implementation.

Arrivals and Departures:

We don't usually have much to report in terms of departures but this reporting period saw higher than usual turnover in the team. This was brought about by a combination of factors; the delayed tender outcome and difficulties maintaining salaries against a background of frozen funding, as well as some career development opportunities elsewhere. We have been unusually successful in third sector terms in recruiting to all of our vacancies and welcomed new people to the team.

2024-2025 Work Plan for AWW: There are some key areas of focus in this year:

- Further service development including at the Single Point of Contact
- Improving feedback methods for both the people we support and others
- As we near the end of Henry Smith funding for the service for people with a learning disability and autistic people in Pembrokeshire, we focus on achieving new and sustainable funding for that service.
- We continue to work with other advocacy providers around the ongoing funding difficulties in the sector, including advocating for additional funding to meet need, ensure quality and enable our team members to be appropriately rewarded for their work.

Challenges in the Advocacy Sector: There has been a real crisis in health and social care over recent years and this has continued to impact advocacy services as well as other third sector services. This primarily impacts the people we support in terms of their access to appropriate and necessary services, and in terms of them being able to achieve the outcomes they are looking for.

However, it also impacts us directly as an organisation in circumstances where the funding for most of our services has been frozen for many years. This is impacting our ability to maintain salary levels at the level appropriate for the specialist skills and demanding roles within the organisation. It is also leading to difficult decisions around budgeting. We have sought to maintain our advocacy and support team without losing frontline hours from our services, and have made consolidated pay awards, albeit well below the level of inflation, in this reporting period and in the current year. AWW remains competitive as a potential employer of advocates. However this year we expect a number of projects to end the year in deficit and therefore continuing as is won't be possible in the longer term without the introduction of additional financial resource.

Across Wales services such as ours report similar difficulties and struggle to recruit and retain skilled team members and meet the increasing costs of service provision including the rising cost of compliance related expenditure and costs of advancing technological needs.

Thanks and Acknowledgements: Our Chair Andy Watters has already extended thanks to our funders, supporters, partners and other stakeholders, and I echo that.

My thanks this year are reserved to our team here at AWW, both out on the front-line of advocacy and the support team. Their ongoing dedication and expertise has been admirable. They have continued to demonstrate remarkable adaptability and resilience during this period. Many of our team members and our Trustees bring their lived experience as an integral part of the work they do within the organisation and on behalf of the people we support. I look forward to working with the whole team, including our new members, over the next year as we strive to deliver quality, empathic services for those who seek out or rely on our support.

With the very best of wishes to everyone involved with AWW-EGC.

Quote from a
service user;

“Advocacy was a
game changer “

Independent Mental Health Advocacy (IMHA): Statutory Service – Mental Health Act and Mental Health Wales Measure:

This service has been provided since its inception in 2008 by this organisation. 2022 saw the start of a new 3-5 year contract commissioned by Hywel Dda University Health Board with the support of NHS Shared Services Procurement. Funding is ringfenced by Welsh Government but there hasn't been a real terms increase since 2008. Now in our 3rd year of the current contract indications are that it will roll over to a full 5 year term.

There were difficulties in this period maintaining a full team. This put pressure on the service and required considerable support from a number of team members to meet the needs of the people we support. However, the most significant impact has been the longer term crisis in health and social care services which has affected our clients' ability to access services they need in a timely way. This has meant long delays in accessing services, obtaining care packages or places in care home or placement settings, and longer stays in hospital as a result. This has been further complicated by a series of care home closures which has further slowed discharge from hospital settings. It is a credit to the team that they have been able to continue to meet the advocacy needs through this period.

This year IMHAs have supported over 677 people to understand and uphold their legal and human rights, to engage in care and treatment planning, to support their self-advocacy and expression of their views and wishes, to ensure that people lacking capacity are kept at the centre of decision making about issues impacting their lives. There is a near equal representation of male and female clients accessing our IMHA service. 56% of the people we supported were detained under a section of the Mental Health Act, with the other 44% either being informal (in hospital with their consent) or subject to Deprivation of Liberty Safeguards (where they lacked capacity to consent to admission/treatment).

This service continues to receive incredibly good feedback from clients and commissioners/other stakeholders alike. Thanks must go to the dedicated team across AWW-EGC in providing this service and continuing to strongly advocate client views and seek to uphold their rights and entitlements in an increasingly difficult environment in health and social care services.

We continue to work to improve delivery with ongoing training, awareness training to referrers, improvements in outcomes and feedback collation. We led on the development of a regular All Wales IMHA Peer Group which meets every 2 months. This is now well developed and attended and provides a valuable source of support for advocates and their managers from the three providers across Wales.

Three County Independent Professional Advocacy under the Social Services and Wellbeing Act: This service involves supporting adults facing barriers to getting their views heard, and undergoing social care and support assessment, planning and review, safeguarding processes, and complaint about these. The service started 1.4.22 and will run for between 4 and 7 years.

This service completed its second full year during this reporting period. We have had regular contract reviews with the three local authorities who fund this service and positive feedback about its implementation. The partnership has had challenges but has also thrived. The service receives regular referrals. We supported people in the second year, with a range of care and support needs including mental health, learning disability, autism, physical disability, sensory impairment, carers.



Natasha Fox, Chief Officer, September 2024



COMMUNITY MENTAL HEALTH ADVOCACY REPORT APRIL 2023- MARCH 2024

The start of this reporting year remained very challenging as we continued to await the outcome of the community tender. This was an incredibly difficult time for all staff and management involved with this service. At the beginning of the year, we had to explore potential redundancy and how we would in the worst-case scenario manage a transition of the service to another provider. We were very happy and relieved in June to receive the welcome news that the service would remain with AWW. This extended service came into effect in July now also covering all ages, Carers and Veterans.

We were aware that the challenges the service, and especially the staff, had faced through the tender process had a considerable impact. From July we began to rebuild and develop the new service. I must take this opportunity to sincerely thank all the staff that stuck with us throughout this time and enabled us to strengthen and rebuild as we have. The team also offered many shadowing experiences for all the new starters we had for this service in September.

The new service has been incredibly busy, and we have had to develop our Single Point of Contact to be able to manage waiting lists for all three counties. This has been achieved by the dedication and hard work of our Project Development Manager Peggy Spooner and her team Alison Elford (then client case worker (CCW) and drop in advocate) and Jo Davies (CCW). They are fantastic as the first welcoming voice people hear when contacting our service. They have also had a vital role this year helping to manage people's expectations through the Single Point of Contact and actioning any changes and developments that have occurred within the service. Thank you for all for your continuous hard work within these challenging roles. To help ensure the service continued to improve and develop, we have had community reviews in November and January in addition to ongoing audits of the waiting list by the leadership team to ensure appropriate prioritisation of advocacy needs for the people we support.

Work carried out across the 3 counties from July – March

We have worked with 692 clients in this time, with 492 of these being new referrals. We have supported more women (64%) than males (35%) and just under 1% who identify as non-binary.

Within this time the top issues that advocates have supported their clients with are:

Mental health: 1813

Access to health services: 1268

Accommodation: 1213

Access to other services: 1135

Finance Benefits: 850

Physical health: 737

Daily activity: 668

Children contact care: 647

Medication: 549

Family friends: 524



Professional to client
– “You need an
advocate from AWW
– they’re some of
the best people you
could ever meet”

I will take this opportunity to provide a more specific update for all our community services:

The Community Mental Health Advocacy Service – Pembrokeshire

This has remained a very busy service with 197 new referrals between July and March. In this time, they worked with 300 clients. We have had some changes to the advocates during this time. At the beginning of the year there had been an extensive period of cover following one of the full-time advocates leaving the previous February. Kate Roberts continued to do an amazing job covering all the needs of her clients and stretching to meet all urgent needs as best she could. She then had Emma Singh join her in September. However, we had a change of advocates in January with Emma moving to Ceredigion and Abi Alexander returning to Pembrokeshire.

The Community Mental Health Advocacy Service – Carmarthenshire

There have been several staff changes during this year. At the start of the year, it was a very difficult period with only 1 of the 2 full time advocates in post and they were off long term. Following the award of the new contract in July we welcomed Greg Williams in September who worked closely with our very experienced advocate Clare Singleton. I must thank them for all their hard work along with the client case workers to tackle the waiting list. From July to March, they worked with 229 clients and 155 of these were new referrals.

The Community Mental Health Advocacy Service – Ceredigion

From July to March the service worked with 163 clients with 91 of these being new referrals. I must thank Ceridwen Kabir and Abi Alexander for all their hard work meeting the needs of clients through a very difficult year. In January we saw a small staff change with Emma Singh moving to Ceredigion and Abi returning to work in Pembrokeshire.

Carmarthenshire Tudor Trust Drop-in Service

We are grateful to our funders Tudor Trust for their extension to enable us to keep this service running for another three years from April 2023. Our drop in advocate Sue Williams has continued to deliver drop-ins in Ammanford, Carmarthen and Llanelli. She has also reached out, engaging with services for surgeries within the Gwendraeth Valley and also attending outreach events held by connecting Carmarthenshire. This has been a valuable environment to continue to raise awareness of the drop-in service along with all other services AWW provides. Big thank you to Sue for her continuous hard work.

Pembrokeshire Hywel Davies Trust Drop-In Service

There have been a few changes to the service through the year. We said goodbye to Helen Hillary and welcomed Alison Elford in September as Client Case Worker and drop-in advocate. Alison carried out the TRI drop in on a Tuesday morning and we moved the Pembroke Dock drop in from Wednesday to the Tuesday afternoon. The Haverfordwest drop in was covered by Emma Singh until January and then covered alternate weeks by Kate and Abi, the community advocates. We continue to utilise the Drop-in to help meet the needs of all lower-level advocacy needs people have, or those who do not require support at meetings.

Kate Bailey - Assistant Manager

Quotes from Users

“Amazing help!”

“You’ve been my rock!”

“You made me feel worthwhile and some positivity.”

Henry Smith Funded Independent Advocacy Service for People with a Learning Disability and Autistic People in Pembrokeshire

The service continues to operate with two part-time advocates and has now entered its final year of Henry Smith funding. As part of this grant programme we have the opportunity to engage with the community practice events and participate in a regular reporting process. Ultimately this will lead to a final report on the success of the project and evidence for continuation for future funders.

We have had 97 new referrals to the service in the past year and worked with 129 overall. Referrals come mainly from the 3rd sector, social services and self-referrals with increasing examples of improved confidence with repeat self-referrers.

The trend shows an even split between clients with Learning Disability and Autism with a rising number of people seeking support towards an Autism Diagnosis.

The crisis in Health, Social Care and Housing sectors continues to impact on the time spent with clients and the service offers longer periods of support to those impacted by this. Recorded outcomes reflect this, with the most time spent on issues such as accommodation and accessing health and social services provision.

The service worked with a training provider to create a bespoke Autism Training session which was well received by the wider team and increased confidence in communication with our Autistic clients across the organisation.

We are experiencing improved outcomes with the use of digital technology which is helping to enhance communication and engagement. Further to this we are now looking to enhance accessibility for individuals by exploring funding opportunities for a drop-in service in key locations.

Our focus is now on achieving this and sustainable long-term funding for the service.

Shelly Newton, Independent Advocate and Service Manager



"Don't walk behind me;
I may not lead.
Don't walk in front of me;
I may not follow.
Just walk beside me
and be my advocate"

AWW-EGC Team Charter

CLIENT LED

Our organisation exists for the benefit of our clients. We commit to working with clients flexibly to meet their advocacy needs, including the provision of face to face or remote service as appropriate to their needs. We move at the pace of our clients.

GOLD STANDARD SERVICE

We strive to provide high quality, empathic, independent advocacy that meets or exceeds the standards set out in the Advocacy Charter

INDEPENDENCE

We are independent of all other services and we commit to diligently guarding our independence for our clients and for our organisation.

ONE TEAM

We commit to a One Team approach whereby we are equal in our respective roles, and nourish a culture of achievement, respect, appreciation and celebration. We are a diverse team with shared fundamental advocacy values and practice at our core, and a shared responsibility for the work of the organisation.

DEVELOPMENT

We commit to a development culture that adapts to new knowledge and skills. We invest in our own and our colleagues' professional development, learning and reflective practice across all areas relevant to our respective roles and collective needs.

COMMITMENT

We commit to working at AWW-EGC and want to be part of this highly respected organisation. We commit to its ways of working as set out in the organisation's policies and procedures.

RESPONSIBILITY AND ACCOUNTABILITY

We set clear expectations as leaders, as team members, and with and for our clients and other stakeholders. We practice reflectively, strive to resolve issues and use learning to aid our development. We take ownership of our actions.

EQUALITY

We have a commitment to equality, diversity and social justice in all that we do.

SUPPORT AND SOLUTIONS

We commit to supporting our colleagues in their roles, collaborating to find supportive resolutions to issues that arise. Our leaders and governance team lead by example.

Trustees

Andy Watters, Chair

Carolyn Oakley, Treasurer (*resigned July 24*)

Jane Kelso, Trustee

Helen Butland, Trustee

Emlyn Schiavone, Vice-Chair

Dan Rosie (*from Oct 2023*)

~~~~~

## Staff Team

Natasha Fox, Chief Officer

Kate Bailey, Deputy Manager

Sue Blantern, Office Manager/Administrator

Andrea Potter, Supervisor/IMHA Carmarthenshire  
(*resigned June 23*)

Nia Williams, Supervisor/IMHA, Carmarthenshire

Sarah Thomas, IMHA, Carmarthenshire

Sue Williams, Drop in service Advocate

Ian Rees, IMHA Carmarthenshire (*retired July 23*)

Rebecca Arnold, IMHA Carmarthenshire

Jayne Edwards, Information Officer (*resigned August 23*)

Clare Singleton, Community Advocate,  
Carmarthenshire

Peggy Spooner, Project Development Manager

Elaine Lewis, Independent Advocate,  
Carmarthenshire

Kate Roberts, Community Advocate,  
Pembrokeshire

Shelly Newton, LD & AP Advocate

Ceridwen Kabir, Community Advocate Ceredigion

Temitope Adebayo, Finance Officer (*resigned October 23*)

Natalie Sen, IMHA/3CIPA Advocate

Abi Alexander, Independent Advocate

Joanne Davies, Client Caseworker

Chloe Ellis, CCW (*resigned April 23*)

Helen Hillary, Advocate (*resigned September 23*)

Rachel Dillon, LD & AP Advocate

Allison Brown, Independent Advocate (*resigned April 23*)

Cara Gaskill (*resigned April 23*)

Alison Elford, Independent Advocate (*from September 23*)

Daryl Jones, Independent Advocate  
(*from September 23*)

Emma Singh, Independent Advocate  
(*resigned April 24*)

Greg Williams, Independent Advocate  
(*resigned May 24*)

Robert Phillips, Independent Advocate  
(*from September 23*)

Kelly Woodrow, Independent Advocate (*from June 24*)

Debbie Haughey, CCW/Drop in Advocate (*from June 24*)

Anna Jenkins, CCW (*from June 24*)



# With thanks to our Funders



the  
**Tudor**trust

Hywel Davies Trust





**Advocacy West Wales**  
**Eiriolaeth Gorllewin Cymru**

*A voice when you need it most*  
*Llais pan fydd ei angen arnoch fwyaf*

**CHARITY REGISTRATION NUMBER: 1172200**

**REPORTS AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MARCH 2024  
FOR  
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

**L M Griffiths & Co Limited  
Chartered Certified Accountants  
1&2 Merfins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB**

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**FINANCIAL STATEMENTS**  
**for the year ended 31 March 2024**

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**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2024**

**Structure, Governance and Management**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

**History**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

**Objectives and activities for the public benefit**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) Providing independent advocacy services for adults with a range of needs for care and support, and people of all ages with mental health needs, and people with a learning disability and autistic people, supporting self-advocacy and providing self-advocacy workshops.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2024**

**Achievements and Performance**

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
- Independent Professional Advocacy in Carmarthenshire, Ceredigion and Pembrokeshire
- Tudor Trust Drop In Services Carmarthenshire ongoing
- All ages Community Mental Health, Carmarthenshire, Ceredigion and Pembrokeshire
- Hywel Davies Drop-in Services in Pembrokeshire from June 2022 to March 2023 and ongoing
- Adults with a learning disability or autism in Pembrokeshire

**Financial Review**

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Hywel Dda LHB, Welsh Government, Pembrokeshire County Council, Ceredigion County Council, Carmarthenshire County Council, Tudor Trust, Hywel Davies Trust, Henry Smith Charity

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £737,835.

**Reserves Policy**

The current policy is to hold reserves equivalent to:  
3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £129,811 and restricted reserves amounted to £158,874.

**Future Developments**

We will be looking to secure future funding for Drop In services, Learning Disability and autistic people from 2025.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2024**

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

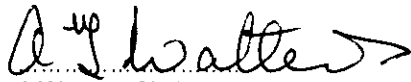
The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

  
A Watters, Chairperson

Date: 11-10-2024 .

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2024**

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2023.

**REFERENCE & ADMINISTRATIVE DETAILS**

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

|                  |                               |
|------------------|-------------------------------|
| Andy Watters     | Chair                         |
| Carolyn Oakley   | Treasurer (resigned 08/07/24) |
| Jane Kelso       |                               |
| Helen Butland    |                               |
| Emlyn Sciavone   |                               |
| Daniel Rosie     | (appointed 23/09/23)          |
| Ajay Chance Owen | (appointed 24/07/24)          |

Accountants L M Griffiths & Co Ltd  
Chartered Certified Accountants  
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers CAF Bank Ltd  
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**INDEPENDENT EXAMINER'S REPORT**  
**31 March 2024**

**Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru**  
I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (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 come across no other matters in connection with the examination to which attention should be drawn in this report to enable a proper understanding of the accounts to be reached.

Michael Harries FCCA  
L M Griffiths & Co Ltd  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**STATEMENT OF FINANCIAL ACTIVITIES**  
for the year ended 31 March 2024

|                                                       | Notes | Unrestricted<br>funds | Designated<br>&<br>Restricted<br>funds | Total<br>funds<br>2024 | Total<br>funds<br>2023 |
|-------------------------------------------------------|-------|-----------------------|----------------------------------------|------------------------|------------------------|
|                                                       |       | £                     | £                                      | £                      | £                      |
| <b>INCOMING RESOURCES</b>                             |       |                       |                                        |                        |                        |
| <b>Incoming resources from generated funds:</b>       |       |                       |                                        |                        |                        |
| Voluntary income                                      | 3     | 2,092                 | 731,195                                | 733,287                | 931,254                |
| Investment income                                     | 4     | 4,548                 | -                                      | 4,548                  | 1,469                  |
| <b>Incoming resources from charitable activities:</b> |       |                       |                                        |                        |                        |
| Grants & contracts                                    | 5     | -                     | -                                      | -                      | -                      |
| <b>Total incoming resources</b>                       |       | <u>6,640</u>          | <u>731,195</u>                         | <u>737,835</u>         | <u>932,723</u>         |
| <b>RESOURCES EXPENDED</b>                             |       |                       |                                        |                        |                        |
|                                                       | 15    |                       |                                        |                        |                        |
| Charitable activities                                 |       | <u>76,599</u>         | <u>678,645</u>                         | <u>755,244</u>         | <u>829,774</u>         |
| <b>Total resources expended</b>                       |       | <u>76,599</u>         | <u>678,645</u>                         | <u>755,244</u>         | <u>829,774</u>         |
| <b>NET INCOMING RESOURCES before transfers</b>        |       | (69,959)              | 52,550                                 | (17,409)               | 102,949                |
| <b>Gross transfers between funds</b>                  | 12&13 | <u>68,649</u>         | <u>(68,649)</u>                        | <u>-</u>               | <u>-</u>               |
| <b>Net incoming /(outgoing) resources</b>             |       | <u>(1,310)</u>        | <u>(16,099)</u>                        | <u>(17,409)</u>        | <u>102,949</u>         |
| <b>RECONCILIATION OF FUNDS</b>                        |       |                       |                                        |                        |                        |
| Funds brought forward                                 |       | <u>131,121</u>        | <u>174,973</u>                         | <u>306,094</u>         | <u>203,145</u>         |
| <b>TOTAL FUNDS CARRIED FORWARD</b>                    | 12    | <u>129,811</u>        | <u>158,874</u>                         | <u>288,685</u>         | <u>306,094</u>         |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**BALANCE SHEET**

As at 31 March 2024

|                                               | Notes | Unrestricted<br>funds | Restricted<br>income<br>funds | Total this<br>year<br>2024 | Total last<br>year<br>2023 |
|-----------------------------------------------|-------|-----------------------|-------------------------------|----------------------------|----------------------------|
|                                               |       | £                     | £                             | £                          | £                          |
| <b>FIXED ASSETS</b>                           |       |                       |                               |                            |                            |
| Tangible assets                               | 9     | 73                    | 452                           | 525                        | 2,641                      |
|                                               |       | 73                    | 452                           | 525                        | 2,641                      |
| <b>CURRENT ASSETS</b>                         |       |                       |                               |                            |                            |
| Debtors : Amounts falling due within one year | 10    | -                     | -                             | -                          | 690                        |
| Cash at bank and in hand                      |       | 129,738               | 179,190                       | 308,928                    | 319,692                    |
|                                               |       | 129,738               | 179,190                       | 308,928                    | 320,382                    |
| <b>CREDITORS</b>                              |       |                       |                               |                            |                            |
| Amounts falling due within one year           | 11    | -                     | 20,768                        | 20,768                     | 16,929                     |
| <b>NET CURRENT ASSETS</b>                     |       | 129,738               | 158,422                       | 288,160                    | 303,453                    |
| <b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>  |       | 129,811               | 158,874                       | 288,685                    | 306,094                    |
| <b>FUNDS</b>                                  | 12    |                       |                               |                            |                            |
| Unrestricted funds                            |       | 129,811               | -                             | 129,811                    | 131,121                    |
| Restricted funds                              |       | -                     | 158,874                       | 158,874                    | 174,973                    |
| <b>TOTAL FUNDS</b>                            |       | 129,811               | 158,874                       | 288,685                    | 306,094                    |

The financial statements were approved by the trustees on 18-9-2024 and were signed on its behalf by:

A J Watters 11-10-2024  
A Watters, Chair

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**1 Basis of preparation**

**1.1 Basis of accounting**

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.

**1.2 Change in basis of accounting**

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

**2 Accounting policies**

**2.1 Incoming resources**

**Recognition of incoming resources**

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

**Incoming resources with related expenditure**

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

**Grants and donations**

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

**Tax reclaims on donations and gifts**

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

**Contractual income and performance related grants**

This is only included in the SoFA once the related goods or services have been delivered.

**Gifts in kind**

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

**Donated services and facilities**

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

**Volunteer help**

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

**Investment income**

This is included in the accounts when receivable.

**Investment gains and losses**

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

**2.2 Expenditure & liabilities**

**Liability recognition**

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

**Governance costs**

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

**2.3 Assets**

**Tangible fixed assets for use by charity**

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt. Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**3 VOLUNTARY INCOME**

| <b>2024</b>        |                               |       | <b>2023</b> |
|--------------------|-------------------------------|-------|-------------|
| Unrestricted Funds | Designated & Restricted Funds | Total | Total       |
| £                  | £                             | £     | £           |
| Other income       | 92                            | -     | 92          |
|                    | 92                            | -     | 92          |
|                    |                               |       | 4,065       |

**4 INVESTMENT INCOME**

|                          | <b>2023</b> | <b>2022</b> |
|--------------------------|-------------|-------------|
|                          | £           | £           |
| Deposit account interest | 4,548       | 1,469       |

**5 GRANTS & CONTRACTS**

| <b>2024</b>          |                               |         | <b>2023</b> |
|----------------------|-------------------------------|---------|-------------|
| Unrestricted Funds   | Designated & Restricted Funds | Total   | Total       |
| £                    | £                             | £       | £           |
| Community P          | -                             | 73,812  | 73,812      |
| Community C          | -                             | 91,753  | 91,753      |
| Community Ceredigion | -                             | 50,084  | 50,084      |
| Henry Smith          | -                             | 60,000  | 60,000      |
| IMHA                 | -                             | 197,250 | 197,250     |
| Carers               | -                             | -       | -           |
| PPF                  | -                             | -       | -           |
| CIPA                 | -                             | 228,296 | 228,296     |
| Lloyds               | -                             | -       | -           |
| Tudor                | -                             | 32,000  | 32,000      |
| Hywel Davies Trust   | -                             | -       | -           |
|                      | -                             | 733,195 | 733,195     |
|                      |                               |         | 849,459     |

**6 NET INCOMING/(OUTGOING) RESOURCES**

|                                          | <b>2024</b> | <b>2023</b> |
|------------------------------------------|-------------|-------------|
|                                          | £           | £           |
| Net resources are stated after charging: |             |             |
| Accountancy fees                         | 1,452       | 1,362       |
| Depreciation                             | 2,117       | 2,117       |

**7 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.

|                                       | <b>2024</b> | <b>2023</b> |
|---------------------------------------|-------------|-------------|
|                                       | £           | £           |
| Trustees' expenses                    | -           | 25          |
| Number of trustees receiving expenses | -           | 1           |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**8 STAFF COSTS**

|                                                                         | <b>2024</b> | <b>2023</b> |
|-------------------------------------------------------------------------|-------------|-------------|
|                                                                         | <b>£</b>    | <b>£</b>    |
| Wages and salaries                                                      | 545,578     | 622,605     |
| The average monthly number of employees during the year was as follows: |             |             |
|                                                                         | <b>2024</b> | <b>2023</b> |
| Full time (based on 30 hours per week)                                  | 13          | 10          |
| Part time                                                               | 9           | 17          |
|                                                                         | 22          | 27          |

There were no employees with salaries in excess of £60,000

**9 TANGIBLE FIXED ASSETS**

|                       | <b>Fixtures<br/>and fittings<br/>£</b> | <b>Computer<br/>equipment<br/>£</b> | <b>Total<br/>£</b> |
|-----------------------|----------------------------------------|-------------------------------------|--------------------|
| <b>COST</b>           |                                        |                                     |                    |
| At 1 April 2023       | 1,190                                  | 27,713                              | 28,903             |
| Additions             | -                                      | -                                   | -                  |
| At 31 March 2024      | 1,190                                  | 27,713                              | 28,903             |
| <b>DEPRECIATION</b>   |                                        |                                     |                    |
| At 1 April 2023       | 1,190                                  | 25,071                              | 26,261             |
| Charge for year       | -                                      | 2,117                               | 2,117              |
| At 31 March 2024      | 1,190                                  | 27,188                              | 28,378             |
| <b>NET BOOK VALUE</b> |                                        |                                     |                    |
| At 31 March 2024      | -                                      | 525                                 | 525                |
| At 31 March 2023      | -                                      | 2,642                               | 2,642              |

**10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

|                                      | <b>2024</b> | <b>2023</b> |
|--------------------------------------|-------------|-------------|
|                                      | <b>£</b>    | <b>£</b>    |
| Amounts falling due within one year: | -           | 690         |
|                                      | -           | 690         |

**11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

|                 | <b>2024</b> | <b>2023</b> |
|-----------------|-------------|-------------|
|                 | <b>£</b>    | <b>£</b>    |
| Accruals        | 1,452       | 1,362       |
| Other creditors | 19,316      | 15,567      |
|                 | 20,768      | 16,929      |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**12 MOVEMENT IN FUNDS**

|                           | At 01.04.23 | Funds brought forward at 01.04.23<br>£ | Net movement in funds<br>£ | Transfers between funds<br>£ | At 31.03.24<br>£ |
|---------------------------|-------------|----------------------------------------|----------------------------|------------------------------|------------------|
| <b>Unrestricted funds</b> |             |                                        |                            |                              |                  |
| General fund              | -           | 56,712                                 | (69,959)                   | -                            | (13,247)         |
| <b>Restricted funds</b>   |             |                                        |                            |                              |                  |
| Restricted income funds   | -           | 249,382                                | 52,550                     | -                            | 301,932          |
| <b>TOTAL FUNDS</b>        | -           | <b>306,094</b>                         | <b>(17,409)</b>            | -                            | <b>288,685</b>   |

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

|                           | Incoming resources<br>£ | Resources expended<br>£ | Movement in funds<br>£ |
|---------------------------|-------------------------|-------------------------|------------------------|
| <b>Unrestricted funds</b> |                         |                         |                        |
| General fund              | 6,640                   | 76,599                  | (69,959)               |
| <b>Restricted funds</b>   |                         |                         |                        |
| Restricted income funds   | 731,195                 | 678,645                 | 52,550                 |
| <b>TOTAL FUNDS</b>        | <b>737,835</b>          | <b>755,244</b>          | <b>(17,409)</b>        |

**13 TRANSFERS BETWEEN FUNDS**

Transfers were made from CIPA, Pembrokeshire Community, Carmarthenshire Community, Tudor Trust, Community Ceredigion, Henry Smith, Hywel Davies and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

**14 FUND DEFICITS**

As at the year end 31 March 2024, no funds were in a deficit position

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES**

|                                                         | Unrestricted    |                     |                     |                          | Restricted Funds |                |                          |                |               | 2024             | 2023             |
|---------------------------------------------------------|-----------------|---------------------|---------------------|--------------------------|------------------|----------------|--------------------------|----------------|---------------|------------------|------------------|
|                                                         | Reserves<br>£   | Community<br>P<br>£ | Community<br>C<br>£ | Community-<br>Ceredigion | IMHA<br>£        | Henry<br>Smith | Hywel<br>Davies<br>Trust | CIPA<br>£      | Tudor<br>£    | Total funds<br>£ | Total funds<br>£ |
| <b>INCOMING RESOURCES</b>                               |                 |                     |                     |                          |                  |                |                          |                |               |                  |                  |
| Voluntary & other income                                | 92              |                     |                     |                          |                  |                |                          |                |               | 92               | 4,065            |
| Government Grants                                       | 2,000           | 73,812              | 91,753              | 50,084                   | 197,250          | 60,000         | -                        | 228,296        | 30,000        | 733,195          | 927,169          |
| Investment income                                       | 4,548           |                     |                     |                          |                  |                |                          |                |               | 4,548            | 1,469            |
| <b>Total incoming resources</b>                         | <b>6,640</b>    | <b>73,812</b>       | <b>91,753</b>       | <b>50,084</b>            | <b>197,250</b>   | <b>60,000</b>  | <b>-</b>                 | <b>228,296</b> | <b>30,000</b> | <b>737,835</b>   | <b>932,723</b>   |
| <b>RESOURCES EXPENDED</b>                               |                 |                     |                     |                          |                  |                |                          |                |               |                  |                  |
| <b>Charitable activities</b>                            |                 |                     |                     |                          |                  |                |                          |                |               |                  |                  |
| Salaries & wages                                        | 56,413          | 54,056              | 59,768              | 48,138                   | 134,878          | 43,335         | 17,532                   | 55,700         | 22,065        | 491,885          | 574,346          |
| Partnerships                                            | -               | -                   | -                   | -                        | -                | -              | -                        | 133,873        | -             | 133,873          | 123,848          |
| Travel expenses                                         | 329             | 2,228               | 1,569               | 2,535                    | 5,648            | 988            | 1,056                    | 2,098          | 317           | 16,770           | 19,666           |
| Training / Recruitment                                  | -               | 273                 | 222                 | 46                       | 461              | 90             | 15                       | 452            | 14            | 1,572            | 4,886            |
| CRB Checks                                              | 38              | 31                  | 22                  | 61                       | 99               | 15             | 7                        | 44             | 8             | 326              | 393              |
| Subscriptions                                           | 200             | -                   | -                   | -                        | -                | -              | -                        | -              | -             | 200              | 229              |
|                                                         | 56,981          | 56,588              | 61,581              | 50,779                   | 141,086          | 44,429         | 18,610                   | 192,168        | 22,404        | 644,626          | 723,371          |
| <b>Support costs</b>                                    |                 |                     |                     |                          |                  |                |                          |                |               |                  |                  |
| Salaries & wages                                        | 483             | 5,371               | 6,677               | 3,645                    | 14,354           | 4,366          | -                        | 16,614         | 2,183         | 53,693           | 48,259           |
| Training                                                | 42              | 101                 | 89                  | 254                      | 230              | -              | -                        | 245            | 32            | 993              | 763              |
| Rent & rates                                            | 4,506           | 1,260               | 1,455               | 1,020                    | 3,535            | 1,260          | 315                      | 1,895          | 428           | 15,674           | 16,218           |
| Room hire                                               | 127             | 105                 | 112                 | 101                      | 173              | 16             | 8                        | 167            | 26            | 835              | 495              |
| Insurance                                               | 3,500           | 269                 | 324                 | 246                      | 739              | -              | -                        | 363            | -             | 5,441            | 5,076            |
| Telephone                                               | 1,004           | 1,291               | 1,313               | 1,105                    | 3,452            | 1,169          | 952                      | 1,638          | 1,145         | 13,069           | 11,779           |
| Postage, stationery & advertising                       | 208             | 79                  | 122                 | 56                       | 243              | 65             | 12                       | 171            | 24            | 980              | 1,628            |
| Website & computing costs                               | 2,227           | 695                 | 747                 | 547                      | 1,679            | 593            | 226                      | 945            | 30            | 7,689            | 7,565            |
| Equipment                                               | 53              | 45                  | 73                  | 91                       | 115              | 43             | 11                       | 53             | 12            | 495              | 838              |
| Access to work                                          | 66              | -                   | -                   | -                        | -                | -              | -                        | -              | -             | 66               | 3,264            |
| Sundries                                                | -               | -                   | -                   | -                        | 8                | -              | -                        | -              | -             | 8                | 1,890            |
| Professional fees                                       | 4,597           | 236                 | 271                 | 213                      | 634              | 194            | 84                       | 589            | 96            | 6,914            | 5,050            |
| Bank charges                                            | 60              | -                   | -                   | -                        | -                | -              | -                        | -              | -             | 60               | 72               |
| AGM/Staff welfare                                       | 1,049           | 6                   | 8                   | 9                        | 33               | 8              | 12                       | 6              | -             | 1,131            | -                |
| Accountancy                                             | 1,452           | -                   | -                   | -                        | -                | -              | -                        | -              | -             | 1,452            | 1,362            |
| Trustees' expenses                                      | -               | -                   | -                   | -                        | -                | -              | -                        | -              | -             | -                | 25               |
| Depreciation                                            | 244             | 366                 | 62                  | 4                        | 532              | 112            | 158                      | 463            | 176           | 2,117            | 2,117            |
|                                                         | 18,618          | 9,824               | 11,253              | 7,291                    | 25,727           | 7,826          | 1,778                    | 23,149         | 4,152         | 110,618          | 106,403          |
| <b>Total resources expended</b>                         | <b>76,599</b>   | <b>66,412</b>       | <b>72,834</b>       | <b>58,070</b>            | <b>166,813</b>   | <b>52,255</b>  | <b>20,388</b>            | <b>215,317</b> | <b>26,556</b> | <b>755,244</b>   | <b>829,774</b>   |
| <b>NET INCOMING/OUTGOING RESOURCES before transfers</b> | <b>(69,959)</b> | <b>7,400</b>        | <b>18,919</b>       | <b>(7,986)</b>           | <b>30,437</b>    | <b>7,745</b>   | <b>(20,388)</b>          | <b>12,979</b>  | <b>3,444</b>  | <b>(17,409)</b>  | <b>102,949</b>   |
| Gross transfers between funds                           | 68,649          | (7,743)             | (9,625)             | (6,633)                  | (23,670)         | (6,000)        | (3,958)                  | (8,020)        | (3,000)       | -                | -                |
| Net incoming/(outgoing) resources                       | -               | -                   | -                   | -                        | -                | -              | -                        | -              | -             | (17,409)         | 102,949          |
| Funds brought forward                                   | 131,121         | 28,908              | 4,134               | 18,335                   | 17,592           | 1,288          | 99,693                   | 2,197          | 2,826         | 306,094          | 203,145          |
| <b>Funds carried forward</b>                            | <b>129,811</b>  | <b>28,565</b>       | <b>13,428</b>       | <b>3,716</b>             | <b>24,359</b>    | <b>3,033</b>   | <b>75,347</b>            | <b>7,156</b>   | <b>3,270</b>  | <b>288,885</b>   | <b>306,094</b>   |

CHARITY REGISTRATION NUMBER: 1172200

**REPORTS AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MARCH 2024  
FOR  
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited  
Chartered Certified Accountants  
1&2 Merfins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**FINANCIAL STATEMENTS**  
**for the year ended 31 March 2024**

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**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2024**

**Structure, Governance and Management**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

**History**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

**Objectives and activities for the public benefit**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) Providing independent advocacy services for adults with a range of needs for care and support, and people of all ages with mental health needs, and people with a learning disability and autistic people, supporting self-advocacy and providing self-advocacy workshops.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2024**

**Achievements and Performance**

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
- Independent Professional Advocacy in Carmarthenshire, Ceredigion and Pembrokeshire
- Tudor Trust Drop In Services Carmarthenshire ongoing
- All ages Community Mental Health, Carmarthenshire, Ceredigion and Pembrokeshire
- Hywel Davies Drop-in Services in Pembrokeshire from June 2022 to March 2023 and ongoing
- Adults with a learning disability or autism in Pembrokeshire

**Financial Review**

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Hywel Dda LHB, Welsh Government, Pembrokeshire County Council, Ceredigion County Council, Carmarthenshire County Council, Tudor Trust, Hywel Davies Trust, Henry Smith Charity

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £737,835.

**Reserves Policy**

The current policy is to hold reserves equivalent to:

3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £129,811 and restricted reserves amounted to £158,874.

**Future Developments**

We will be looking to secure future funding for Drop In services, Learning Disability and autistic people from 2025.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2024**

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

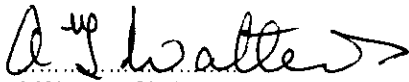
The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

  
A Watters, Chairperson

Date: 11-10-2024 .

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2024**

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2023.

**REFERENCE & ADMINISTRATIVE DETAILS**

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

|                  |                               |
|------------------|-------------------------------|
| Andy Watters     | Chair                         |
| Carolyn Oakley   | Treasurer (resigned 08/07/24) |
| Jane Kelso       |                               |
| Helen Butland    |                               |
| Emlyn Sciavone   |                               |
| Daniel Rosie     | (appointed 23/09/23)          |
| Ajay Chance Owen | (appointed 24/07/24)          |

Accountants L M Griffiths & Co Ltd  
Chartered Certified Accountants  
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers CAF Bank Ltd  
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**INDEPENDENT EXAMINER'S REPORT**  
**31 March 2024**

**Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru**  
I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (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 come across no other matters in connection with the examination to which attention should be drawn in this report to enable a proper understanding of the accounts to be reached.

Michael Harries FCCA  
L M Griffiths & Co Ltd  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**STATEMENT OF FINANCIAL ACTIVITIES**  
for the year ended 31 March 2024

|                                                       | Notes | Unrestricted<br>funds | Designated<br>&<br>Restricted<br>funds | Total<br>funds<br>2024 | Total<br>funds<br>2023 |
|-------------------------------------------------------|-------|-----------------------|----------------------------------------|------------------------|------------------------|
|                                                       |       | £                     | £                                      | £                      | £                      |
| <b>INCOMING RESOURCES</b>                             |       |                       |                                        |                        |                        |
| <b>Incoming resources from generated funds:</b>       |       |                       |                                        |                        |                        |
| Voluntary income                                      | 3     | 2,092                 | 731,195                                | 733,287                | 931,254                |
| Investment income                                     | 4     | 4,548                 | -                                      | 4,548                  | 1,469                  |
| <b>Incoming resources from charitable activities:</b> |       |                       |                                        |                        |                        |
| Grants & contracts                                    | 5     | -                     | -                                      | -                      | -                      |
| <b>Total incoming resources</b>                       |       | <u>6,640</u>          | <u>731,195</u>                         | <u>737,835</u>         | <u>932,723</u>         |
| <b>RESOURCES EXPENDED</b>                             |       |                       |                                        |                        |                        |
|                                                       | 15    |                       |                                        |                        |                        |
| Charitable activities                                 |       | <u>76,599</u>         | <u>678,645</u>                         | <u>755,244</u>         | <u>829,774</u>         |
| <b>Total resources expended</b>                       |       | <u>76,599</u>         | <u>678,645</u>                         | <u>755,244</u>         | <u>829,774</u>         |
| <b>NET INCOMING RESOURCES before transfers</b>        |       | (69,959)              | 52,550                                 | (17,409)               | 102,949                |
| <b>Gross transfers between funds</b>                  | 12&13 | <u>68,649</u>         | <u>(68,649)</u>                        | <u>-</u>               | <u>-</u>               |
| <b>Net incoming /(outgoing) resources</b>             |       | <u>(1,310)</u>        | <u>(16,099)</u>                        | <u>(17,409)</u>        | <u>102,949</u>         |
| <b>RECONCILIATION OF FUNDS</b>                        |       |                       |                                        |                        |                        |
| Funds brought forward                                 |       | <u>131,121</u>        | <u>174,973</u>                         | <u>306,094</u>         | <u>203,145</u>         |
| <b>TOTAL FUNDS CARRIED FORWARD</b>                    | 12    | <u>129,811</u>        | <u>158,874</u>                         | <u>288,685</u>         | <u>306,094</u>         |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**BALANCE SHEET**

As at 31 March 2024

|                                               | Notes | Unrestricted<br>funds | Restricted<br>income<br>funds | Total this<br>year<br>2024 | Total last<br>year<br>2023 |
|-----------------------------------------------|-------|-----------------------|-------------------------------|----------------------------|----------------------------|
|                                               |       | £                     | £                             | £                          | £                          |
| <b>FIXED ASSETS</b>                           |       |                       |                               |                            |                            |
| Tangible assets                               | 9     | 73                    | 452                           | 525                        | 2,641                      |
|                                               |       | 73                    | 452                           | 525                        | 2,641                      |
| <b>CURRENT ASSETS</b>                         |       |                       |                               |                            |                            |
| Debtors : Amounts falling due within one year | 10    | -                     | -                             | -                          | 690                        |
| Cash at bank and in hand                      |       | 129,738               | 179,190                       | 308,928                    | 319,692                    |
|                                               |       | 129,738               | 179,190                       | 308,928                    | 320,382                    |
| <b>CREDITORS</b>                              |       |                       |                               |                            |                            |
| Amounts falling due within one year           | 11    | -                     | 20,768                        | 20,768                     | 16,929                     |
| <b>NET CURRENT ASSETS</b>                     |       | 129,738               | 158,422                       | 288,160                    | 303,453                    |
| <b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>  |       | 129,811               | 158,874                       | 288,685                    | 306,094                    |
| <b>FUNDS</b>                                  | 12    |                       |                               |                            |                            |
| Unrestricted funds                            |       | 129,811               | -                             | 129,811                    | 131,121                    |
| Restricted funds                              |       | -                     | 158,874                       | 158,874                    | 174,973                    |
| <b>TOTAL FUNDS</b>                            |       | 129,811               | 158,874                       | 288,685                    | 306,094                    |

The financial statements were approved by the trustees on 18-9-2024 and were signed on its behalf by:

A J Watters 11-10-2024  
A Watters, Chair

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**1 Basis of preparation**

**1.1 Basis of accounting**

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.

**1.2 Change in basis of accounting**

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

**2 Accounting policies**

**2.1 Incoming resources**

**Recognition of incoming resources**

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

**Incoming resources with related expenditure**

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

**Grants and donations**

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

**Tax reclaims on donations and gifts**

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

**Contractual income and performance related grants**

This is only included in the SoFA once the related goods or services have been delivered.

**Gifts in kind**

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

**Donated services and facilities**

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

**Volunteer help**

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

**Investment income**

This is included in the accounts when receivable.

**Investment gains and losses**

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

**2.2 Expenditure & liabilities**

**Liability recognition**

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

**Governance costs**

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

**2.3 Assets**

**Tangible fixed assets for use by charity**

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt. Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**3 VOLUNTARY INCOME**

| <b>2024</b>        |                               |       | <b>2023</b> |
|--------------------|-------------------------------|-------|-------------|
| Unrestricted Funds | Designated & Restricted Funds | Total | Total       |
| £                  | £                             | £     | £           |
| Other income       | 92                            | -     | 92          |
|                    | 92                            | -     | 92          |
|                    |                               |       | 4,065       |

**4 INVESTMENT INCOME**

|                          | <b>2023</b> | <b>2022</b> |
|--------------------------|-------------|-------------|
|                          | £           | £           |
| Deposit account interest | 4,548       | 1,469       |

**5 GRANTS & CONTRACTS**

| <b>2024</b>          |                               |         | <b>2023</b> |
|----------------------|-------------------------------|---------|-------------|
| Unrestricted Funds   | Designated & Restricted Funds | Total   | Total       |
| £                    | £                             | £       | £           |
| Community P          | -                             | 73,812  | 73,812      |
| Community C          | -                             | 91,753  | 91,753      |
| Community Ceredigion | -                             | 50,084  | 50,084      |
| Henry Smith          | -                             | 60,000  | 60,000      |
| IMHA                 | -                             | 197,250 | 197,250     |
| Carers               | -                             | -       | -           |
| PPF                  | -                             | -       | -           |
| CIPA                 | -                             | 228,296 | 228,296     |
| Lloyds               | -                             | -       | -           |
| Tudor                | -                             | 32,000  | 32,000      |
| Hywel Davies Trust   | -                             | -       | -           |
|                      | -                             | 733,195 | 733,195     |
|                      |                               |         | 849,459     |

**6 NET INCOMING/(OUTGOING) RESOURCES**

|                                          | <b>2024</b> | <b>2023</b> |
|------------------------------------------|-------------|-------------|
|                                          | £           | £           |
| Net resources are stated after charging: |             |             |
| Accountancy fees                         | 1,452       | 1,362       |
| Depreciation                             | 2,117       | 2,117       |

**7 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.

|                                       | <b>2024</b> | <b>2023</b> |
|---------------------------------------|-------------|-------------|
|                                       | £           | £           |
| Trustees' expenses                    | -           | 25          |
| Number of trustees receiving expenses | -           | 1           |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**8 STAFF COSTS**

|                                                                         | <b>2024</b> | <b>2023</b> |
|-------------------------------------------------------------------------|-------------|-------------|
|                                                                         | <b>£</b>    | <b>£</b>    |
| Wages and salaries                                                      | 545,578     | 622,605     |
| The average monthly number of employees during the year was as follows: |             |             |
|                                                                         | <b>2024</b> | <b>2023</b> |
| Full time (based on 30 hours per week)                                  | 13          | 10          |
| Part time                                                               | 9           | 17          |
|                                                                         | 22          | 27          |
| There were no employees with salaries in excess of £60,000              |             |             |

**9 TANGIBLE FIXED ASSETS**

|                       | <b>Fixtures<br/>and fittings<br/>£</b> | <b>Computer<br/>equipment<br/>£</b> | <b>Total<br/>£</b> |
|-----------------------|----------------------------------------|-------------------------------------|--------------------|
| <b>COST</b>           |                                        |                                     |                    |
| At 1 April 2023       | 1,190                                  | 27,713                              | 28,903             |
| Additions             | -                                      | -                                   | -                  |
| At 31 March 2024      | 1,190                                  | 27,713                              | 28,903             |
| <b>DEPRECIATION</b>   |                                        |                                     |                    |
| At 1 April 2023       | 1,190                                  | 25,071                              | 26,261             |
| Charge for year       | -                                      | 2,117                               | 2,117              |
| At 31 March 2024      | 1,190                                  | 27,188                              | 28,378             |
| <b>NET BOOK VALUE</b> |                                        |                                     |                    |
| At 31 March 2024      | -                                      | 525                                 | 525                |
| At 31 March 2023      | -                                      | 2,642                               | 2,642              |

**10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

|                                      | <b>2024</b> | <b>2023</b> |
|--------------------------------------|-------------|-------------|
|                                      | <b>£</b>    | <b>£</b>    |
| Amounts falling due within one year: | -           | 690         |
|                                      | -           | 690         |

**11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

|                 | <b>2024</b> | <b>2023</b> |
|-----------------|-------------|-------------|
|                 | <b>£</b>    | <b>£</b>    |
| Accruals        | 1,452       | 1,362       |
| Other creditors | 19,316      | 15,567      |
|                 | 20,768      | 16,929      |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2024**

**12 MOVEMENT IN FUNDS**

|                           | At 01.04.23 | Funds brought forward at 01.04.23<br>£ | Net movement in funds<br>£ | Transfers between funds<br>£ | At 31.03.24<br>£ |
|---------------------------|-------------|----------------------------------------|----------------------------|------------------------------|------------------|
| <b>Unrestricted funds</b> |             |                                        |                            |                              |                  |
| General fund              | -           | 56,712                                 | (69,959)                   | -                            | (13,247)         |
| <b>Restricted funds</b>   |             |                                        |                            |                              |                  |
| Restricted income funds   | -           | 249,382                                | 52,550                     | -                            | 301,932          |
| <b>TOTAL FUNDS</b>        | -           | <b>306,094</b>                         | <b>(17,409)</b>            | -                            | <b>288,685</b>   |

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

|                           | Incoming resources<br>£ | Resources expended<br>£ | Movement in funds<br>£ |
|---------------------------|-------------------------|-------------------------|------------------------|
| <b>Unrestricted funds</b> |                         |                         |                        |
| General fund              | 6,640                   | 76,599                  | (69,959)               |
| <b>Restricted funds</b>   |                         |                         |                        |
| Restricted income funds   | 731,195                 | 678,645                 | 52,550                 |
| <b>TOTAL FUNDS</b>        | <b>737,835</b>          | <b>755,244</b>          | <b>(17,409)</b>        |

**13 TRANSFERS BETWEEN FUNDS**

Transfers were made from CIPA, Pembrokeshire Community, Carmarthenshire Community, Tudor Trust, Community Ceredigion, Henry Smith, Hywel Davies and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

**14 FUND DEFICITS**

As at the year end 31 March 2024, no funds were in a deficit position

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU  
NOTES TO THE ACCOUNTS  
31 March 2024

15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES

|                                                             | Unrestricted  |                | Restricted Funds |                          |           |                |                          |           | 2024       |                  | 2023             |
|-------------------------------------------------------------|---------------|----------------|------------------|--------------------------|-----------|----------------|--------------------------|-----------|------------|------------------|------------------|
|                                                             | Reserves<br>£ | Community<br>£ | Community<br>£   | Community-<br>Ceredigion | IMHA<br>£ | Henry<br>Smith | Hywel<br>Davies<br>Trust | CIPA<br>£ | Tudor<br>£ | Total funds<br>£ | Total funds<br>£ |
| <b>INCOMING RESOURCES</b>                                   |               |                |                  |                          |           |                |                          |           |            |                  |                  |
| Voluntary & other income                                    | 92            |                |                  |                          |           |                |                          |           |            | 92               | 4,065            |
| Government Grants                                           | 2,000         | 73,812         | 91,753           | 50,084                   | 197,250   | 60,000         | -                        | 228,296   | 30,000     | 733,195          | 927,169          |
| Investment income                                           | 4,548         |                |                  |                          |           |                |                          |           |            | 4,548            | 1,469            |
| <b>Total incoming resources</b>                             | 6,640         | 73,812         | 91,753           | 50,084                   | 197,250   | 60,000         | -                        | 228,296   | 30,000     | 737,835          | 932,723          |
| <b>RESOURCES EXPENDED</b>                                   |               |                |                  |                          |           |                |                          |           |            |                  |                  |
| <b>Charitable activities</b>                                |               |                |                  |                          |           |                |                          |           |            |                  |                  |
| Salaries & wages                                            | 56,413        | 54,056         | 59,768           | 48,138                   | 134,878   | 43,335         | 17,532                   | 55,700    | 22,065     | 491,885          | 574,346          |
| Partnerships                                                | -             | -              | -                | -                        | -         | -              | -                        | 133,873   | -          | 133,873          | 123,848          |
| Travel expenses                                             | 329           | 2,228          | 1,569            | 2,535                    | 5,648     | 988            | 1,056                    | 2,098     | 317        | 16,770           | 19,666           |
| Training / Recruitment                                      | -             | 273            | 222              | 46                       | 461       | 90             | 15                       | 452       | 14         | 1,572            | 4,886            |
| CRB Checks                                                  | 38            | 31             | 22               | 61                       | 99        | 15             | 7                        | 44        | 8          | 326              | 393              |
| Subscriptions                                               | 200           | -              | -                | -                        | -         | -              | -                        | -         | -          | 200              | 229              |
|                                                             | 56,981        | 56,588         | 61,581           | 50,779                   | 141,086   | 44,429         | 18,610                   | 192,168   | 22,404     | 644,626          | 723,371          |
| <b>Support costs</b>                                        |               |                |                  |                          |           |                |                          |           |            |                  |                  |
| Salaries & wages                                            | 483           | 5,371          | 6,677            | 3,645                    | 14,354    | 4,366          | -                        | 16,614    | 2,183      | 53,693           | 46,259           |
| Training                                                    | 42            | 101            | 89               | 254                      | 230       | -              | -                        | 245       | 32         | 993              | 763              |
| Rent & rates                                                | 4,506         | 1,260          | 1,455            | 1,020                    | 3,535     | 1,260          | 315                      | 1,895     | 428        | 15,674           | 16,218           |
| Room hire                                                   | 127           | 105            | 112              | 101                      | 173       | 16             | 8                        | 167       | 26         | 835              | 495              |
| Insurance                                                   | 3,500         | 269            | 324              | 246                      | 739       | -              | -                        | 363       | -          | 5,441            | 5,076            |
| Telephone                                                   | 1,004         | 1,291          | 1,313            | 1,105                    | 3,452     | 1,169          | 952                      | 1,638     | 1,145      | 13,069           | 11,779           |
| Postage, stationery & advertising                           | 208           | 79             | 122              | 56                       | 243       | 65             | 12                       | 171       | 24         | 980              | 1,628            |
| Website & computing costs                                   | 2,227         | 695            | 747              | 547                      | 1,679     | 593            | 226                      | 945       | 30         | 7,689            | 7,565            |
| Equipment                                                   | 53            | 45             | 73               | 91                       | 115       | 43             | 11                       | 53        | 12         | 495              | 838              |
| Access to work                                              | 66            | -              | -                | -                        | -         | -              | -                        | -         | -          | 66               | 3,264            |
| Sundries                                                    | -             | -              | -                | -                        | 8         | -              | -                        | -         | -          | 8                | 1,890            |
| Professional fees                                           | 4,597         | 236            | 271              | 213                      | 634       | 194            | 84                       | 589       | 96         | 6,914            | 5,050            |
| Bank charges                                                | 60            | -              | -                | -                        | -         | -              | -                        | -         | -          | 60               | 72               |
| AGM/Staff welfare                                           | 1,049         | 6              | 8                | 9                        | 33        | 8              | 12                       | 6         | -          | 1,131            | -                |
| Accountancy                                                 | 1,452         | -              | -                | -                        | -         | -              | -                        | -         | -          | 1,452            | 1,362            |
| Trustees' expenses                                          | -             | -              | -                | -                        | -         | -              | -                        | -         | -          | -                | 25               |
| Depreciation                                                | 244           | 366            | 62               | 4                        | 532       | 112            | 158                      | 463       | 176        | 2,117            | 2,117            |
|                                                             | 18,618        | 9,824          | 11,253           | 7,291                    | 25,727    | 7,826          | 1,776                    | 23,149    | 4,152      | 110,618          | 106,403          |
| <b>Total resources expended</b>                             | 76,599        | 66,412         | 72,834           | 58,070                   | 166,813   | 52,255         | 20,388                   | 215,317   | 26,556     | 755,244          | 829,774          |
| <b>NET INCOMING/OUTGOING<br/>RESOURCES before transfers</b> | (69,959)      | 7,400          | 18,919           | (7,986)                  | 30,437    | 7,745          | (20,388)                 | 12,979    | 3,444      | (17,409)         | 102,949          |
| Gross transfers between funds                               | 68,649        | (7,743)        | (9,625)          | (6,633)                  | (23,670)  | (6,000)        | (3,958)                  | (8,020)   | (3,000)    | -                | -                |
| Net incoming/(outgoing) resources                           | -             | -              | -                | -                        | -         | -              | -                        | -         | -          | (17,409)         | 102,949          |
| Funds brought forward                                       | 131,121       | 28,908         | 4,134            | 18,335                   | 17,592    | 1,288          | 99,693                   | 2,197     | 2,826      | 306,094          | 203,145          |
| Funds carried forward                                       | 129,811       | 28,565         | 13,428           | 3,716                    | 24,359    | 3,033          | 75,347                   | 7,156     | 3,270      | 288,885          | 306,094          |

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# Accounts

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# Advocacy West Wales — Eiriolaeth Gorllewin Cymru



Advocacy West Wales  
Eiriolaeth Gorllewin Cymru

*A voice when you need it most  
Llais pan fydd ei angen arnoch fwyaf*

## ANNUAL REPORT 2022 - 2023

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Registered Charity No: 1172200

## **Chair's Report 2022-2023**

My report will start, unfortunately, on a negative note because events of the past 12 months have impacted everyone at AWW-EGC and will have consequences for the current year 2023/24.

In January the team submitted a bid for the Community Mental Health contract for the three counties. The results were due to be announced in March and the new contract to start at the beginning of July. In fact, the result of the tender was not announced until the end of May. Although AWW-EGC's bid was successful, the delay had a major impact on the organisation. The uncertainty and consequent anxiety affected not just those members of staff whose jobs were at risk, but the whole team. We lost a number of team members and were unable to recruit new staff to fill vacancies. The service relied heavily on the good will of those remaining team members who stayed despite the risks to job security and who worked extra hours to meet need. Many of our clients were also impacted as a result of extended waiting times for service.

As a group of Trustees we felt we were letting down the loyal and hard working people of the organisation, but were unable to offer any solutions. The consequent disruption to morale and the service will take some time to work through, but has begun in earnest.



A continuing challenge for our the people we support, our team and the charity as a whole is the rise in the cost of living. This has been increasingly challenging during this period particularly as the majority of the services continued to be funded at the same level without any inflationary increases. Some contracts have not had increased funding for over 10 years.

On a more positive note, the Chief Officers Report will highlight some of the successes and achievements over the past year, of which there have been many.

I must acknowledge our partners in delivering the 3CIPA (Independent Professional Advocacy) Service across the 3 counties; Age Cymru Dyfed, Dewis CIL, Carmarthenshire People First and Carers Trust Crossroads West Wales.

There have been increases in demand across all services, especially Pembrokeshire, where we have a long established presence. This has to some extent been alleviated by the establishment of a "drop-in" service funded by a generous grant from The Hywel Davies Trust.

Funding from The Tudor Trust was due to come to an end during this reporting period. A successful request for continuation funding now enables the Carmarthenshire Drop-In Service to operate from three venues across the county. Tudor Trust have generously funded several Well-being Days enabling the team to experience various healthy recreational activities as well as building relationships with their colleagues.

A grant from the Henry Smith Foundation that started during this period, has enabled the continuation and expansion of the service for People with a Learning Disability and Autistic People in Pembrokeshire.

Once again, I would like to thank my fellow trustees for their wisdom and support during this difficult year; the Vice-Chair Emlyn Schiavone, Treasurer Carolyn Oakley, our longest serving colleague and AWW-EGC champion Jane Kelso, and Helen Butland for her sound input including into recruitment. I also welcome our newest member to the Board, Daniel Rosie. Daniel expressed an interest in joining several years ago, and now that he has returned to Wales he has joined us.

I am very aware that we are a relatively small board of trustees and none of us are getting any younger. If you are reading this report and you know of anyone who has an interest in mental health or would like to champion the further development of our advocacy services, and has skills to contribute to our Trustee board, then please do encourage them to contact us.



Andrew Watters  
Chairperson, AWW-EGC

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## **Chief Officer's Report April 2022-March 2023**

Each year I start this report stating that we have had a year full of developments and that we are looking to consolidate for a period. Every year throws up new challenges and opportunities. This year has perhaps been our most challenging yet. Whilst we are now in a situation with all services on confirmed funding for at least the next 2 years or more, this year has taken its toll on our services and our team, and therefore impacted the support we have been able to offer to the people who need our services.

### **Achievements in Securing Funding:**

We were able to achieve further progress in terms of securing funding for existing and new services during this reporting period with the following funding bids to grant foundations/organisations and statutory services:

**Community Mental Health Advocacy Services – Carmarthenshire, Ceredigion and Pembrokeshire:** This was MAP's founding service going back over 20 years. With the merger with Eiriol in 2020 and the extension of service to Ceredigion in 2020, AWW has been able to offer this service over West Wales since then. It went out to tender on a regional basis with a much expanded specification to include children and young people, carers and veterans, during this period. The bidding process was challenging and the outcome of the tender much delayed, but we were delighted to get confirmation of award from 1.7.23.

**Tudor Trust:** 3 years continuation funding confirmed in this period for 2023-2026 to continue our Mental Health Advocacy Drop-in Service across Carmarthenshire. This service has enabled lower level preventive work to support people at a time when demand on our one to one service has been at an all time high.

### **First Year of New Contract Delivery:**

**3CIPA (Three County Independent Professional Advocacy Service):** AWW-EGC Chair has already thanked our partners in this project which was in its first year. A more detailed report is attached to this report.

**Henry Smith – Independent Advocacy for People with a Learning Disability and Autistic People in Pembrokeshire:** During the preceding period, we applied for dedicated funding for a 3 year project to enable sustainable funding for our existing service for PwLD and AP in Pembrokeshire. This is the first time this service has had specific funding and confirms Pembrokeshire People First's trust in placing this service with us back in January 2021. This was the first year of this project.

We were privileged to receive funding for a Drop In Mental Health Advocacy Service in Pembrokeshire and additional funds to support our core department in the running of the charity. During this reporting period that service has run throughout Pembrokeshire in key locations.

**Final Year Funding - Lloyds Bank Foundation:** As an organisation we have been funded by Lloyds Bank Foundation with a grant supporting our core department since 2019. We successfully applied for a final year of funding and the grant expired in April 2023. This funding has been critical in enabling us to support our management and non-advocacy roles in their support for our advocacy teams, particularly as we improve the quality and security of our technology and awareness of our services.

We were again successful in every funding proposal submitted during 2022-23.

### **Service Development:**

**AWW Team Charter – Our Commitments:** During this period we were able to complete work on the AWW Team Charter, the set of commitments we make as a team to AWW, our colleagues and most importantly to the people we support, and which, along with the Advocacy Charter, guide us in our work. If you would like to see a copy of the Charter please do request one.

**Development of Volunteering Opportunities and Streams:** A focus this year has been on improving opportunities for people with lived experience to be involved at all levels of our organisation. To reflect the range of skills volunteers bring to AWW, and opportunities for people to enhance their skills in engaging in volunteering at AWW, we have implemented different streams of volunteering roles across the organisation and our geographical areas. These include roles in advocacy alongside our drop-in advocates, administration, publicity and awareness, governance and trusteeship, and feedback and storytelling. We have uploaded volunteering vacancies to the new and improved Volunteering Wales website and are starting to receive applications from volunteers.

**Regional Advocacy Strategy Network and Other Networks:** We have continued to work with Age Cymru's Hope Project in delivering a range of advocacy training for our advocacy colleagues across Wales. We've collaborated with the Regional Chairs' Network around the funding crisis in advocacy services across Wales including writing jointly to the Minister. We have supported sector engagement with the Mental Health Act Reform Consultation and ongoing work in the All Wales Advocacy Work to raise systemic issues faced by the people we support – digital exclusion, the impact of the cost of living and health and social care crises, difficulties for people in our rural area accessing care home placements within their home areas, and lengthy delays in access to domiciliary care packages. We have continued to co-ordinate with other providers the All Wales Independent Mental Health Advocacy Peer Group which, amongst other issues, strongly challenged the Mental Health Review Tribunal for Wales to return to face to face hearings and make patient choice about venue/method of hearing the primary focus.

**Arrivals and Departures:** We don't usually have much to report in terms of departures but this year has been challenging with the outcome of a significant tender delayed by many months. This has led to greater turnover in staff in this reporting period, some of whom have moved to go on to progress their careers to the next level or in fields where the reimbursement more properly reflects their skills, some of whom left owing to job uncertainty. I would however like to recognise one person in particular who left AWW during this period; Pete Irvine, a long time colleague and a leader in advocacy development in the region, retired this year. I would like to thank him for his contribution on behalf of his clients, on behalf of AWW and the wider sector, and his wisdom in the development of many an advocate over his years in advocacy.

**2023-2024 Work Plan for AWW:** Consolidation – Change and growth has kept coming at AWW during these last few years. It has been crucial to support our services, the people we support, and to make the organisation more resilient and sustainable long term. However, with that change and growth come new challenges. We now need a period of consolidation and training focus to ensure that we are able to build the team together as one and ensure the quality of our work continues to meet the high standards we expect.

### **Challenges in the Advocacy Sector:**

Whilst the organisation has attracted new funding, its ongoing contracts with statutory services have yet to see an increase in funding, going back many years in some instances.

With the cost of living crisis and inflationary pressures, years of static funding, effectively year on year funding cuts, and increased demand for our services, has impacted hugely this year.

Across Wales services such as ours are struggling to maintain quality provision, meet expanded advocacy needs for the people we support, and recruit and retain skilled team members. We are increasingly seeing salary levels and terms and conditions fall behind those of statutory services and budgets are being squeezed on all sides by rising costs in all other areas and new compliance related expenditure and advances in technology.

We have been a key participant in a sector wide approach to Welsh Government and commissioning authorities to advocate for increases in funding including funding that takes account of the actual costs of service delivery. We have ongoing dialogue with the Minister in this regard and have collaborated with Lloyds Bank Foundation in relation to a piece of work they are doing on the issue.

### **Thanks and Acknowledgements:**

Our Chair Andy Watters has already extended thanks to our funders, supporters, partners and other stakeholders, and I echo that.

However, my whole hearted thanks this year are reserved to our team here at AWW, both out on the front-line of advocacy and the support team here at Advocacy West Wales. In this most exacting of years, their dedication and expertise has been admirable. They have shown remarkable adaptability and resilience during this period. I look forward to working with the whole team including our new members over the next year and to see the organisation rebuild for the benefit of those who rely upon our services.

With the very best of wishes to everyone involved with AWW-EGC.



Quote from a  
service user;  
Thank you!  
You are a



I will briefly detail the key aspects of services for which I have management responsibility.

**Independent Mental Health Advocacy (IMHA): Statutory Service – Mental Health Act and Mental Health**

**Wales Measure:** This service has been provided since its inception in 2008 by this organisation. 2022 saw the start of a new 3-5 year contract commissioned by Hywel Dda University Health Board with the support of NHS Shared Services Procurement. The service has been impacted to some extent by Covid-19 during this reporting period. However, the most significant impact has been its longer term impact on health and social care services which has affected our clients' and their ability to access services they need in a timely way. It is a credit to the team that they have been able to continue to meet the advocacy needs of patients through this period.

This year we have supported nearly 750 people to understand and uphold their legal and human rights, to engage in care and treatment planning, to support their self-advocacy and expression of their views and wishes, to ensure that people lacking capacity are kept at the centre of decision making about issues impacting their lives. There is a near equal representation of male and female clients accessing our IMHA service. We support almost as many people who are informal patients in hospital as we do those on section of the Mental Health Act.

This service continues to receive incredibly good feedback from clients and commissioners/other stakeholders alike. Thanks must go to the dedicated team across AWW-EGC in providing this service and continuing to strongly advocate client views and seek to uphold their rights and entitlements in an increasingly difficult environment in health and social care services.

We continue to work to improve delivery with ongoing training, awareness training to referrers, improvements in outcomes and feedback collation.

**Three County Independent Professional Advocacy under the Social Services and Wellbeing Act:** This service involves supporting adults facing barriers to getting their views across, and undergoing social care and support assessment, planning and review, safeguarding processes, and complaint about these. The service started 1.4.22 and will run for between 4 and 7 years.

This new service has completed its first full year during this reporting period. We have had regular contract reviews with the three local authorities who fund this service and positive feedback about its implementation. The partnership has had challenges but has also thrived. The service receives regular referrals. We supported nearly 500 people in the first year, with a range of care and support needs including mental health, learning disability, autism, physical disability, sensory impairment, carers.



Natasha Fox, Chief Officer, September 2023

Professional to client  
– “You need an  
advocate from AWW  
– they’re some of  
the best people you  
could ever meet”

Quote from service  
user;

“You’re the first  
person that’s listened  
to me.. Thank you.”

## Community Report April 2022-March 2023

It has been a very busy and challenging year for several reasons. Firstly, we have continued to see and experience the aftermath of the pandemic, with high referral rates and the impact of very stretched local services when advocating for our clients. Secondly, a number of staff changes for varying reasons. Thirdly, the formal tender process of the 3-county community service. The impact of this process and the instability it brought cannot be underestimated. At the end of this reporting period, we still did not know if we were successful, but I am very pleased to say we have now reached the other side of this process with a successful outcome and new staff started. We are embracing the opportunity to now consolidate, rebuild and strengthen an incredibly valuable service.

Historically the community service has been 3 separate county based services. However, in September 2022, we had our first full community review focusing on a One Team approach. This was an incredibly valuable time sharing the strengths and challenges the community advocacy service were facing across the 3 counties. Through the year we have built on the one team approach with our client case workers being our central point of contact across the 3 counties.

All three counties have been incredibly busy and across the region we supported nearly 1000 people this year. However Pembrokeshire has needed to introduce a waiting list for 1:1 advocacy for a large part of this reporting year. We continue to contact all clients seeking to access the community service then explore all possible support options for them. Some clients have accessed 1:1 advocacy more quickly by attending one of our advocacy drop-ins.

Staff changes: We said goodbye to Ed Latter in June 2022. He had taken a lead setting up the community advocacy service in Ceredigion. Abi Alexander moved from the Pembrokeshire community service to replace Ed in Ceredigion. Having welcomed Rosie Culyer into Pembrokeshire, we sadly had to say goodbye to her in February 2023 due to the instability in the funding at the time. For this reason, we had needed to seek the support of the current team across the 3 counties to help cover this vacancy until the outcome of the tender was known.

I would like to take this opportunity to thank all the advocates, client caseworkers and support staff who have worked tirelessly hard through an incredibly difficult season in AWW. Throughout it all it was wonderful to work with people who continued to truly put their clients' needs first in all they did.



Quote from a  
service user;  
"You've gone  
above and  
beyond"

### **Carmarthenshire Tudor Trust Drop in Service**

The Drop-In service continues to run in Carmarthen, Llanelli and Ammanford.

Our drop-in advocate is now Sue Williams and she has her own caseload of those she supports at Drop-In. We are very appreciative of the ongoing working relationships we have with Links and Adferiad.

### **Pembrokeshire Hywel Davies Trust Drop-In Service**

Helen Hillary came into post on the 1<sup>st</sup> August 2022 and worked very hard at getting this service set up and established. Following a change in her hours we welcomed Kate Roberts to the drop-in service too. AWW provides advocacy drop-ins at the VC Gallery in Haverfordwest and Pembroke Dock, as well as the TRI in Tenby. The drop-in services are a vital support to our 1:1 community advocacy service providing a quicker more flexible approach to dealing with lower level advocacy needs.

Kate Bailey - Assistant Manager

## Henry Smith Funded Independent Advocacy Service for People with a Learning Disability and Autistic People in Pembrokeshire

The service is now well established within AWW-EGC and is comprised of Shelly Newton and Rachel Dillon following the retirement of Pete Irvine in Jan 2023.

We have seen a significant increase in the complexity of advocacy referrals and this service tends to hold onto clients for longer periods of time offering an ongoing source of support during challenging moments in an individual's life. The time spent with individuals has noticeably increased by the challenges posed by the cost of living crisis and impact upon availability of services most notably care provision. We have supported over 80 people during this period.

Currently there is an upward trend in co-existing Autistic spectrum disorders and Mental Health and we have seen examples of seamless advocacy transition between teams dependent upon the changing need of the advocacy.

Both team members are Total Communication Co-Ordinators a role which supports the development of advanced communication techniques throughout the wider advocacy team.

We have recently purchased and adopted the use of digital talking mats communication aid which is seeing great success within the service. It is hoped to implement this more widely with additional advocates being trained in Autumn.

The focus will now turn to exploring sustainable funding for the service which has had continuous positive feedback from our funder Henry Smith.

Shelly Newton, Independent Advocate and Service Manager

### Quotes from Users across all AWW services

"You are a glowing beacon!"

"You've been phenomenal"

"You've never let me down"

"You've been incredible"

"Amazing support!"

# AWW-EGC Team Charter

## CLIENT LED

Our organisation exists for the benefit of our clients. We commit to working with clients flexibly to meet their advocacy needs, including the provision of face to face or remote service as appropriate to their needs. We move at the pace of our clients.

## GOLD STANDARD SERVICE

We strive to provide high quality, empathic, independent advocacy that meets or exceeds the standards set out in the Advocacy Charter

## INDEPENDENCE

We are independent of all other services and we commit to diligently guarding our independence for our clients and for our organisation.

## ONE TEAM

We commit to a One Team approach whereby we are equal in our respective roles, and nourish a culture of achievement, respect, appreciation and celebration. We are a diverse team with shared fundamental advocacy values and practice at our core, and a shared responsibility for the work of the organisation.

## DEVELOPMENT

We commit to a development culture that adapts to new knowledge and skills. We invest in our own and our colleagues' professional development, learning and reflective practice across all areas relevant to our respective roles and collective needs.

## COMMITMENT

We commit to working at AWW-EGC and want to be part of this highly respected organisation. We commit to its ways of working as set out in the organisation's policies and procedures.

## RESPONSIBILITY AND ACCOUNTABILITY

We set clear expectations as leaders, as team members, and with and for our clients and other stakeholders. We practice reflectively, strive to resolve issues and use learning to aid our development. We take ownership of our actions.

## EQUALITY

We have a commitment to equality, diversity and social justice in all that we do.

## SUPPORT AND SOLUTIONS

We commit to supporting our colleagues in their roles, collaborating to find supportive resolutions to issues that arise. Our leaders and governance team lead by example.

### **Trustees**

Andy Watters, Chair

Carolyn Oakley, Treasurer

Jane Kelso, Trustee

Helen Butland, Trustee

Emlyn Sciavone, Vice-Chair

~~~~~

Staff Team

Natasha Fox, Chief Officer

Kate Bailey, Deputy Manager

Sue Blantern, Office Manager/Administrator

Andrea Potter, Supervisor/IMHA Carmarthenshire
(resigned June 23)

Nia Williams, Supervisor/IMHA, Carmarthenshire

Sarah Thomas, IMHA, Carmarthenshire

Sue Williams, Drop in service Advocate

Ed Latter, Supervisor Ceredigion (resigned June 22)

Ian Rees, IMHA Carmarthenshire (retired July 23)

Rebecca Arnold, IMHA Pembrokeshire

Jayne Edwards, Information Officer (resigned August 23)

Clare Singleton, Community Advocate,
Carmarthenshire

Peggy Spooner, Client Caseworker/Project
Development worker

Elaine Lewis, Community Advocate,
Carmarthenshire

Pete Irvine, LD & AP Advocate (retired January 23)

Kate Roberts, Community Advocate,
Pembrokeshire

Shelly Newton, LD & AP Advocate

Rachel Watt, IMHA/CIPA (resigned June 22)

Ceridwen Kabir, Community Advocate Ceredigion

Temitope Adebayo, Finance Officer

Amy Tynan, Community Advocate, (resigned March 2023)

Natalie Sen, IMHA/3CIPA Advocate

Abi Alexander, Independent Advocate

Rosie Culyer, Independent Advocate (resigned February 23)

Joanne Davies, Client Caseworker

Chloe Ellis, CCW (resigned April 23)

Helen Hillary, Advocate (resigned September 23)

Rachel Dillon, LD & AP Advocate

Allison Brown, Independent Advocate (resigned April 23)

Cara Gaskill (resigned April 23)

Alison Elford, CCW/Advocate (from September 23)

Daryl Jones, Independent Advocate
(from September 23)

Emma Singh, Independent Advocate
(from September 23)

Greg Williams, Independent Advocate
(from September 23)

Robert Phillips, Independent Advocate
(from September 23)



With thanks to our Funders



Hywel Davies Trust





Advocacy West Wales
Eiriolaeth Gorllewin Cymru

A voice when you need it most
Llais pan fydd ei angen arnoch fwyaf

CHARITY REGISTRATION NUMBER: 1172200

**REPORTS AND FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023
FOR
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited
Chartered Certified Accountants
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
FINANCIAL STATEMENTS
for the year ended 31 March 2023

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ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2023

Structure, Governance and Management

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

History

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

Objectives and activities for the public benefit

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) Providing independent advocacy services for adults with a range of needs for care and support, and people of all ages with mental health needs, and people with a learning disability and autistic people, supporting self-advocacy and providing self-advocacy workshops.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2023

Achievements and Performance

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- adults including older people in Pembrokeshire and in Carmarthenshire
- IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
- Independent Professional Advocacy in Carmarthenshire, Ceredigion and Pembrokeshire
- Tudor Trust Drop In Services Carmarthenshire ongoing
- All ages Community Mental Health, Ceredigion from December 2020
- Hywel Davies Drop-in Services in Pembrokeshire from Jun 2022 to March 2023 and ongoing
- Adults with a learning disability or autism

Financial Review

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Hywel Dda LHB, Pembrokeshire County Council, Ceredigion County Council, Lloyds Bank Foundation, Carmarthenshire County Council, Tudor Trust, Hywel Davies Trust, Henry Smith Charity

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £932,723.

Reserves Policy

The current policy is to hold reserves equivalent to:

3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £122,155 and restricted reserves amounted to £183,939

Future Developments

From 2023 our mental health advocacy services in Carmarthenshire and Pembrokeshire become all age services including CYP and carers.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2023

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

.....
A Watters, Chairperson

Date:

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2023

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2023.

REFERENCE & ADMINISTRATIVE DETAILS

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

Andy Watters
Carolyn Oakley
Jane Kelso
Helen Butland
Emlyn Sciavone

Chair
Treasurer

Accountants

L M Griffiths & Co Ltd
Chartered Certified Accountants
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers

CAF Bank Ltd
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
INDEPENDENT EXAMINER'S REPORT
31 March 2023

Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru

I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (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 come across no other matters in connection with the examination to which attention should be drawn in this report to enable a proper understanding of the accounts to be reached.

Michael Harries FCCA
L M Griffiths & Co Ltd
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
STATEMENT OF FINANCIAL ACTIVITIES
for the year ended 31 March 2023

	Notes	Unrestricted funds	Designated & Restricted funds	Total funds 2023	Total funds 2022
		£	£	£	£
INCOMING RESOURCES					
Incoming resources from generated funds:					
Voluntary income	3	81,795	849,459	931,254	9,011
Investment income	4	1,469	-	1,469	67
Incoming resources from charitable activities:					
Grants & contracts	5	-	-	-	582,252
Total incoming resources		83,264	849,459	932,723	591,330
RESOURCES EXPENDED					
	15				
Charitable activities		113,426	716,348	829,774	667,108
Total resources expended		113,426	716,348	829,774	667,108
NET INCOMING RESOURCES before transfers		(30,162)	133,111	102,949	(75,778)
Gross transfers between funds	12&13	74,409	(74,409)	-	-
Net incoming /(outgoing) resources		44,247	58,702	102,949	(75,778)
RECONCILIATION OF FUNDS					
Funds brought forward		86,874	116,271	203,145	278,923
TOTAL FUNDS CARRIED FORWARD	12	131,121	174,973	306,094	203,145

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
BALANCE SHEET
As at 31 March 2023

	Notes	Unrestricted funds	Restricted income funds	Total this year 2023 £	Total last year 2022 £
		£	£		
FIXED ASSETS					
Tangible assets	9	1,424	1,217	2,641	3,132
		<u>1,424</u>	<u>1,217</u>	<u>2,641</u>	<u>3,132</u>
CURRENT ASSETS					
Debtors : Amounts falling due within one year	10	690	-	690	-
Cash at bank and in hand		129,007	190,685	319,692	216,154
		<u>129,697</u>	<u>190,685</u>	<u>320,382</u>	<u>216,154</u>
CREDITORS					
Amounts falling due within one year	11	-	16,929	16,929	16,141
NET CURRENT ASSETS		<u>129,697</u>	<u>173,756</u>	<u>303,453</u>	<u>200,013</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>131,121</u>	<u>174,973</u>	<u>306,094</u>	<u>203,145</u>
FUNDS	12				
Unrestricted funds		131,121	-	131,121	86,874
Restricted funds		-	174,973	174,973	116,271
TOTAL FUNDS		<u>131,121</u>	<u>174,973</u>	<u>306,094</u>	<u>203,145</u>

The financial statements were approved by the trustees on _____ and were signed on its behalf by:

A Watters, Chair

C Oakley, Treasurer

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

1 Basis of preparation

1.1 Basis of accounting

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.

1.2 Change in basis of accounting

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

1.3 Changes to previous accounts

No changes have been made to accounts for previous years.

2 Accounting policies

2.1 Incoming resources

Recognition of incoming resources

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

Incoming resources with related expenditure

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

Grants and donations

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

Tax reclaims on donations and gifts

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

Contractual income and performance related grants

This is only included in the SoFA once the related goods or services have been delivered.

Gifts in kind

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

Donated services and facilities

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

Volunteer help

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

Investment income

This is included in the accounts when receivable.

Investment gains and losses

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

2.2 Expenditure & liabilities

Liability recognition

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

Governance costs

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

2.3 Assets

Tangible fixed assets for use by charity

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt. Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

3 VOLUNTARY INCOME	2023			2022
	Designated			Total
	Unrestricted Funds	& Restricted Funds	Total	
	£	£	£	
Other income	4,065	-	4,065	8,011
	4,065	-	4,065	8,011

4 INVESTMENT INCOME	2023	2022
	£	£
Deposit account interest	1,469	67

5 GRANTS & CONTRACTS	2023			2022
	Designated			Total
	Unrestricted Funds	& Restricted Funds	Total	
	£	£	£	
Community P	-	72,304	72,304	74,312
Community C	-	89,878	89,878	92,414
Community Ceredigion	-	64,972	64,972	33,368
Henry Smith	-	60,000	60,000	-
IMHA	-	197,250	197,250	201,697
Carers	-	-	-	36,253
PPF	-	-	-	18,605
CIPA	-	221,103	221,103	70,882
Lloyds	-	-	-	25,000
Tudor	-	25,200	25,200	29,721
Hywel Davies Trust	-	118,752	118,752	-
	-	849,459	849,459	582,252

6 NET INCOMING/(OUTGOING) RESOURCES	2023	2022
	£	£
Net resources are stated after charging:		
Accountancy fees	1,362	1,240
Depreciation	2,117	1,783

7 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.

	2023	2022
	£	£
Trustees' expenses	25	102
Number of trustees receiving expenses	1	1

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

8 STAFF COSTS

	2023	2022
	£	£

Wages and salaries	622,605	555,865
--------------------	---------	---------

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

	2023	2022
--	-------------	-------------

Full time (based on 30 hours per week)	10	4
Part time	17	20
	27	24

There were no employees with salaries in excess of £60,000

9 TANGIBLE FIXED ASSETS

	Fixtures and fittings £	Computer equipment £	Total £
COST			
At 1 April 2022	1,190	26,086	27,276
Additions	-	1,627	1,627
	1,190	27,713	28,903
DEPRECIATION			
At 1 April 2022	1,190	22,954	24,144
Charge for year	-	2,117	2,117
	1,190	25,071	26,261
NET BOOK VALUE			
At 31 March 2023	-	2,642	2,642
At 31 March 2022	-	3,132	3,132

10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023	2022
	£	£

Amounts falling due within one year:	690	-
	690	-

11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023	2022
	£	£

Accruals	1,362	1,240
Other creditors	15,567	14,901
	16,929	16,141

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

12 MOVEMENT IN FUNDS

	At 01.04.22	Funds brought forward at 01.04.22 £	Net movement in funds £	Transfers between funds £	At 31.03.23 £
Unrestricted funds					
General fund	-	86,874	(30,162)	-	56,712
Restricted funds					
Restricted income funds	-	116,271	133,111	-	249,382
TOTAL FUNDS	-	203,145	102,949	-	306,094

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	83,264	113,426	(30,162)
Restricted funds			
Restricted income funds	849,459	716,348	133,111
TOTAL FUNDS	932,723	829,774	102,949

13 TRANSFERS BETWEEN FUNDS

Transfers were made from CIPA, Pembrokeshire Community, Carmarthenshire Community, Tudor Trust, Community Ceredigion, Henry Smith, Hywel Davies and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

14 FUND DEFICITS

As at the year end 31 March 2023, no funds were in a deficit position

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES

Unrestricted	Restricted Funds											2023	2022	
	Community	Community	Community-				Henry	Hywel						
Reserves	P	C	Ceredigion	ICF	IMHA	Carers	Smith	Davies	PPF	CIPA	Tudor	Total funds	Total funds	
£	£	£		£	£	£		Trust		£	£	£	£	
4,065												4,065	590,263	
77,730	72,304	89,878	64,972		197,250		60,000	118,752		221,103	25,200	927,189	1,000	
1,469												1,469	67	
83,264	72,304	89,878	64,972	-	197,250	-	60,000	118,752	-	221,103	25,200	932,723	591,330	
83,914	56,337	70,594	52,269		150,460		49,167	12,087		77,228	22,290	574,346	503,249	
					-					123,848		123,848	-	
539	2,166	2,576	3,423		6,016		2,036	776		1,695	442	19,669	15,950	
970	405	321	323		1,418		567	130		671	81	4,886	1,793	
30	29	45	9		92		100			88		393	441	
229												229	595	
85,682	58,937	73,536	56,024	-	157,986	-	51,870	12,993	-	203,530	22,813	723,371	522,028	
6,901	4,746	5,957	4,407		12,688		4,165	1,017		6,489	1,889	48,259	52,616	
	70	61	144		308		71			93	16	763	-	
4,066	1,140	1,832	668		4,619		1,095	330		2,003	465	16,218	15,329	
												-	540	
212	65	36	55		50		12	12		41	12	495	572	
												-	179	
5,078												5,078	5,651	
1,412	1,284	1,139	1,096		3,204		1,187	378		1,434	645	11,779	9,155	
391	129	120	67		402		150	110		198	61	1,628	2,781	
2,568	619	677	546		1,519		454	82		1,060	40	7,565	18,122	
197	66	112	84		146		73	21		121	18	838	1,288	
-		2,161			1,103							3,264	-	
883	9		24		22						952	1,890	117	
4,371					210					469		5,050	33,916	
72												72	96	
												-	1,593	
1,362												1,362	1,240	
25												25	102	
206	366	62	4		532	38	112	158		463	176	2,117	1,783	
27,744	8,494	12,157	7,095	-	24,803	38	7,319	2,108	-	12,371	4,274	106,403	145,080	
113,426	67,431	85,693	63,119	-	182,789	38	59,189	15,101	-	215,901	27,087	829,774	667,108	
(30,162)	4,873	4,185	1,853	-	14,461	(38)	811	103,651	-	5,202	(1,887)	102,949	(75,778)	
74,409	(8,676)	(10,785)	(6,498)	(3,668)	(23,670)	(105)	477	(3,958)	(6,481)	(8,020)	(3,025)	-	-	
-	-	-	-	-	-	-	-	-	-	-	-	102,949	(75,778)	
86,874	32,711	10,734	22,980	3,668	26,801	143	-	-	6,481	5,015	7,738	203,145	278,923	
131,121	28,908	4,134	18,335	-	17,592	-	1,288	99,693	-	2,197	2,826	306,094	203,145	

CHARITY REGISTRATION NUMBER: 1172200

**REPORTS AND FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 MARCH 2023
FOR
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited
Chartered Certified Accountants
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
FINANCIAL STATEMENTS
for the year ended 31 March 2023

CONTENTS

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ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2023

Structure, Governance and Management

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

History

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

Objectives and activities for the public benefit

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) Providing independent advocacy services for adults with a range of needs for care and support, and people of all ages with mental health needs, and people with a learning disability and autistic people, supporting self-advocacy and providing self-advocacy workshops.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2023

Achievements and Performance

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- adults including older people in Pembrokeshire and in Carmarthenshire
- IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
- Independent Professional Advocacy in Carmarthenshire, Ceredigion and Pembrokeshire
- Tudor Trust Drop In Services Carmarthenshire ongoing
- All ages Community Mental Health, Ceredigion from December 2020
- Hywel Davies Drop-in Services in Pembrokeshire from Jun 2022 to March 2023 and ongoing
- Adults with a learning disability or autism

Financial Review

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Hywel Dda LHB, Pembrokeshire County Council, Ceredigion County Council, Lloyds Bank Foundation, Carmarthenshire County Council, Tudor Trust, Hywel Davies Trust, Henry Smith Charity

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £932,723.

Reserves Policy

The current policy is to hold reserves equivalent to:
3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £122,155 and restricted reserves amounted to £183,939

Future Developments

From 2023 our mental health advocacy services in Carmarthenshire and Pembrokeshire become all age services including CYP and carers.

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES' REPORT
31 March 2023

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

.....
A Watters, Chairperson

Date:

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
TRUSTEES REPORT
31 March 2023

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2023.

REFERENCE & ADMINISTRATIVE DETAILS

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

Andy Watters
Carolyn Oakley
Jane Kelso
Helen Butland
Emlyn Sciavone

Chair
Treasurer

Accountants

L M Griffiths & Co Ltd
Chartered Certified Accountants
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers

CAF Bank Ltd
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
INDEPENDENT EXAMINER'S REPORT
31 March 2023

Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru

I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (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 come across no other matters in connection with the examination to which attention should be drawn in this report to enable a proper understanding of the accounts to be reached.

Michael Harries FCCA
L M Griffiths & Co Ltd
1&2 Merlins Court
Winch Lane
Haverfordwest
Pembrokeshire
SA61 1SB

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
STATEMENT OF FINANCIAL ACTIVITIES
for the year ended 31 March 2023

	Notes	Unrestricted funds	Designated & Restricted funds	Total funds 2023	Total funds 2022
		£	£	£	£
INCOMING RESOURCES					
Incoming resources from generated funds:					
Voluntary income	3	81,795	849,459	931,254	9,011
Investment income	4	1,469	-	1,469	67
Incoming resources from charitable activities:					
Grants & contracts	5	-	-	-	582,252
Total incoming resources		83,264	849,459	932,723	591,330
RESOURCES EXPENDED					
	15				
Charitable activities		113,426	716,348	829,774	667,108
Total resources expended		113,426	716,348	829,774	667,108
NET INCOMING RESOURCES before transfers		(30,162)	133,111	102,949	(75,778)
Gross transfers between funds	12&13	74,409	(74,409)	-	-
Net incoming /(outgoing) resources		44,247	58,702	102,949	(75,778)
RECONCILIATION OF FUNDS					
Funds brought forward		86,874	116,271	203,145	278,923
TOTAL FUNDS CARRIED FORWARD	12	131,121	174,973	306,094	203,145

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
BALANCE SHEET
As at 31 March 2023

	Notes	Unrestricted funds	Restricted income funds	Total this year 2023 £	Total last year 2022 £
		£	£		
FIXED ASSETS					
Tangible assets	9	1,424	1,217	2,641	3,132
		1,424	1,217	2,641	3,132
CURRENT ASSETS					
Debtors : Amounts falling due within one year	10	690	-	690	-
Cash at bank and in hand		129,007	190,685	319,692	216,154
		129,697	190,685	320,382	216,154
CREDITORS					
Amounts falling due within one year	11	-	16,929	16,929	16,141
NET CURRENT ASSETS		129,697	173,756	303,453	200,013
TOTAL ASSETS LESS CURRENT LIABILITIES		131,121	174,973	306,094	203,145
FUNDS	12				
Unrestricted funds		131,121	-	131,121	86,874
Restricted funds		-	174,973	174,973	116,271
TOTAL FUNDS		131,121	174,973	306,094	203,145

The financial statements were approved by the trustees on _____ and were signed on its behalf by:

A Watters, Chair

C Oakley, Treasurer

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

1 Basis of preparation

1.1 Basis of accounting

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.

1.2 Change in basis of accounting

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

1.3 Changes to previous accounts

No changes have been made to accounts for previous years.

2 Accounting policies

2.1 Incoming resources

Recognition of incoming resources

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

Incoming resources with related expenditure

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

Grants and donations

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

Tax reclaims on donations and gifts

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

Contractual income and performance related grants

This is only included in the SoFA once the related goods or services have been delivered.

Gifts in kind

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

Donated services and facilities

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

Volunteer help

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

Investment income

This is included in the accounts when receivable.

Investment gains and losses

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

2.2 Expenditure & liabilities

Liability recognition

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

Governance costs

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

2.3 Assets

Tangible fixed assets for use by charity

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt. Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

3 VOLUNTARY INCOME	2023			2022
	Designated			
	Unrestricted Funds	& Restricted Funds	Total	Total
	£	£	£	£
Other income	4,065	-	4,065	8,011
	4,065	-	4,065	8,011

4 INVESTMENT INCOME	2023	2022
	£	£
Deposit account interest	1,469	67

5 GRANTS & CONTRACTS	2023			2022
	Designated			
	Unrestricted Funds	& Restricted Funds	Total	Total
	£	£	£	£
Community P	-	72,304	72,304	74,312
Community C	-	89,878	89,878	92,414
Community Ceredigion	-	64,972	64,972	33,368
Henry Smith	-	60,000	60,000	-
IMHA	-	197,250	197,250	201,697
Carers	-	-	-	36,253
PPF	-	-	-	18,605
CIPA	-	221,103	221,103	70,882
Lloyds	-	-	-	25,000
Tudor	-	25,200	25,200	29,721
Hywel Davies Trust	-	118,752	118,752	-
	-	849,459	849,459	582,252

6 NET INCOMING/(OUTGOING) RESOURCES	2023	2022
	£	£
Net resources are stated after charging:		
Accountancy fees	1,362	1,240
Depreciation	2,117	1,783

7 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.

	2023	2022
	£	£
Trustees' expenses	25	102
Number of trustees receiving expenses	1	1

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

8 STAFF COSTS

	2023	2022
	£	£

Wages and salaries	622,605	555,865
--------------------	---------	---------

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

	2023	2022
--	-------------	-------------

Full time (based on 30 hours per week)	10	4
Part time	17	20
	27	24

There were no employees with salaries in excess of £60,000

9 TANGIBLE FIXED ASSETS

	Fixtures and fittings £	Computer equipment £	Total £
COST			
At 1 April 2022	1,190	26,086	27,276
Additions	-	1,627	1,627
	1,190	27,713	28,903
DEPRECIATION			
At 1 April 2022	1,190	22,954	24,144
Charge for year	-	2,117	2,117
	1,190	25,071	26,261
NET BOOK VALUE			
At 31 March 2023	-	2,642	2,642
At 31 March 2022	-	3,132	3,132

10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023	2022
	£	£

Amounts falling due within one year:	690	-
	690	-

11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2023	2022
	£	£

Accruals	1,362	1,240
Other creditors	15,567	14,901
	16,929	16,141

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

12 MOVEMENT IN FUNDS

	At 01.04.22	Funds brought forward at 01.04.22 £	Net movement in funds £	Transfers between funds £	At 31.03.23 £
Unrestricted funds					
General fund	-	86,874	(30,162)	-	56,712
Restricted funds					
Restricted income funds	-	116,271	133,111	-	249,382
TOTAL FUNDS	-	203,145	102,949	-	306,094

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	83,264	113,426	(30,162)
Restricted funds			
Restricted income funds	849,459	716,348	133,111
TOTAL FUNDS	932,723	829,774	102,949

13 TRANSFERS BETWEEN FUNDS

Transfers were made from CIPA, Pembrokeshire Community, Carmarthenshire Community, Tudor Trust, Community Ceredigion, Henry Smith, Hywel Davies and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

14 FUND DEFICITS

As at the year end 31 March 2023, no funds were in a deficit position

ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU
NOTES TO THE ACCOUNTS
31 March 2023

15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES

Unrestricted	Restricted Funds											2023	2022
	Community	Community	Community-				Henry	Hywel					
Reserves	P	C	Ceredigion	ICF	IMHA	Carers	Smith	Davies	PPF	CIPA	Tudor	Total funds	Total funds
£	£	£		£	£	£		Trust		£	£	£	£
4,065												4,065	590,263
77,730	72,304	89,878	64,972		197,250		60,000	118,752		221,103	25,200	927,189	1,000
1,469												1,469	67
83,264	72,304	89,878	64,972	-	197,250	-	60,000	118,752	-	221,103	25,200	932,723	591,330
83,914	56,337	70,594	52,269		150,460		49,167	12,087		77,228	22,290	574,346	503,249
					-					123,848		123,848	-
539	2,166	2,576	3,423		6,016		2,036	776		1,695	442	19,669	15,950
970	405	321	323		1,418		567	130		671	81	4,886	1,793
30	29	45	9		92		100			88		393	441
229												229	595
85,682	58,937	73,536	56,024	-	157,986	-	51,870	12,993	-	203,530	22,813	723,371	522,028
6,901	4,746	5,957	4,407		12,688		4,165	1,017		6,489	1,889	48,259	52,616
	70	61	144		308		71			93	16	763	-
4,066	1,140	1,832	668		4,619		1,095	330		2,003	465	16,218	15,329
												-	540
212	65	36	55		50		12	12		41	12	495	572
												-	179
5,078												5,078	5,651
1,412	1,284	1,139	1,096		3,204		1,187	378		1,434	645	11,779	9,155
391	129	120	67		402		150	110		198	61	1,628	2,781
2,568	619	677	546		1,519		454	82		1,060	40	7,565	18,122
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27,744	8,494	12,157	7,095	-	24,803	38	7,319	2,108	-	12,371	4,274	106,403	145,080
113,426	67,431	85,693	63,119	-	182,789	38	59,189	15,101	-	215,901	27,087	829,774	667,108
(30,162)	4,873	4,185	1,853	-	14,461	(38)	811	103,651	-	5,202	(1,887)	102,949	(75,778)
74,409	(8,676)	(10,785)	(6,498)	(3,668)	(23,670)	(105)	477	(3,958)	(6,481)	(8,020)	(3,025)	-	-
-	-	-	-	-	-	-	-	-	-	-	-	102,949	(75,778)
86,874	32,711	10,734	22,980	3,668	26,801	143	-	-	6,481	5,015	7,738	203,145	278,923
131,121	28,908	4,134	18,335	-	17,592	-	1,288	99,693	-	2,197	2,826	306,094	203,145

Accounts

Advocacy West Wales — Eiriolaeth Gorllewin Cymru



Advocacy West Wales
Eiriolaeth Gorllewin Cymru

*A voice when you need it most
Llais pan fydd ei angen arnoch fwyaf*

ANNUAL REPORT 2021 - 2022

Registered Office
Advocacy West Wales—Eiriolaeth
Gorllewin Cymru
36/38 High Street
Haverfordwest
SA61 2DA

Tel/Fax: 01437 762935

Registered Charity No: 1172200

Chair's Report 2021-2022

Against our hopes, for the second year, the Covid-19 Pandemic has presented the greatest challenge to the Charity, its staff and its clients, and repeated surges have demanded changes to strategic plans and working practices. The team has worked closely together in responding to Welsh Government guidelines and in adapting to these changes, not only at work but also in their personal lives.

We continued this year to utilise the Tudor Trust Wellbeing Grant fund to support the team in a number of activities designed to provide welcome relief and opportunities to come together in small groups.

We will continue to adapt to the challenges of Covid-19 as we enter this winter period.

On a more positive note we have continued to deliver a service to our clients that has been praised and commended by Commissioners and other stakeholders in service reviews, despite the challenges the last year has brought.

We have successfully re-tendered for service contracts, most notably to continue to deliver the Independent Mental Health Advocacy (IMHA) service from April 22 for the next 3-5 years, and The Three County Independent Advocacy service (3CIPA) in conjunction with our partners, from April 22 for 4-7 years.



I would like to pay tribute to our long term supporter, the late Hywel Davies, whose significant legacy has enabled us to start a "Drop-in Mental Health Advocacy" service for people in Pembrokeshire more recently.

Other generous grants have been received from The Tudor Trust and Lloyds Bank Foundation during this reporting period. These have enabled AWW-EGC to consolidate some services, support core department, and develop other areas.

Over the past few years, under the leadership of our Chief Officer Natasha Fox, and her Assistant Manager Kate Bailey, AWW-EGC has expanded considerably, but through these changes the charity has continued to be financially sound and prudently managed, as the report from The Independent Examiner will confirm. There are dangers however in rapid change and it has been agreed by the Senior Management Team and Trustees that a period of consolidation is prudent, in order to maintain our high standards and to ensure they are consistent and sustainable.

This current year AWW-EGC will again be assessed for resilience and quality by the Quality Performance Mark (QPM) audit, which is an integral part of our Quality Assurance policy, and a requirement for many of our services.

Looking forward, the big challenge for all of us, Trustees, staff and the organisation, will be the financial crisis that we all face, and which unfortunately will have a significant impact on many people's mental health. For the organisation this is set against a backdrop of frozen funding for over a decade. We have had to rely on "efficiency savings" to maintain the same level of service to our clients. I am confident however that we will cope with and adapt to the changing circumstances whilst advocating into commissioning organisations the need for sustainable funding.

My confidence is based on the strategic leadership of our CO Natasha Fox and the Management Team and ably supported by the magnificent Team.

Finally, I would like to thank my colleagues on the Board of Trustees for their continued support and commitment, Helen Butland for staff recruitment, Caroline Evans, Jane Kelso, Hon. Treasurer Carolyn Oakley and Vice Chair Emlyn Schiavone.



Andrew Watters
Chairperson, AWW-EGC

Treasurer's Report 2021- 2022

Total income for the year was £591,330 (£656,001 in 2021 – this included advanced receipts for projects then delivered 2021-2022 and reserves following the transfer of service from Pembrokeshire People First). Total expenditure was £666,661 (£516,275 in 2021) giving a deficit for the year of £75,331 (surplus of £176,118 in 2021). Total funds carried forward were £203,592 (£278,923 in 2021). The increase in expenditure between 20-21 and 21-22 is explained by the increase in projects delivered and resultant increase in staff team.

However, AWW-EGC remains financially sound and continues to be held in high regard by our full range of funders. They are confident that their funds will be put to good use by providing a range of excellent advocacy services across the three counties of Carmarthenshire, Ceredigion and Pembrokeshire.

We would like to thank everyone who has provided funding for AWW-EGC's many projects: Hywel Dda University Health Board, Ceredigion County Council, Lloyds Foundation, Carmarthenshire County Council, Tudor Trust, Enhancing Pembrokeshire, West Wales Care Partnership (WWCP). Advocacy West Wales has also been fortunate in attracting a few donations. Future Developments include Hywel Davies Drop-In services for Pembrokeshire and 3 years funding from Henry Smith for the Pembrokeshire Service for People with a Learning Disability and Autistic People.

Thanks to Temitope Adebayo for her invaluable input as Finance Officer. It is quite an achievement to monitor all the different departments which have increased considerably in number post-merger and with the development of new services across a wider geographical area. She provides regular management accounts for the Chief Officer and the Trustees. We also thank Sue Blantern, Office Manager, for her continued and invaluable input with the many of the financial processes, payroll and other functions. Thanks go to all the staff for delivering excellent front line advocacy services to those who need it.

Again, we must thank Mike Harris FCCA, of L M Griffiths and Co, for producing the final accounts. Last, but certainly not least, a big thank you to Natasha Fox for all her very hard work, planning, managing and leading the organisation. Her bid writing skills have contributed hugely to the financial stability of AWW-EGC, providing employment for many people and a broader range of services for an ever-growing number of service users.

As Treasurer, I am confident that AWW-EGC will continue to go from strength to strength over the coming years.

Carolyn Oakley
07.09.2022

Chief Officer's Report 2021-2022

Every year I start this report stating that we have had a year full of developments and that we are looking to consolidate for a period. Every year throws up new challenges and opportunities.

This year, my 8th year reporting as Chief Officer, has been no exception. It has been the most exacting and yet rewarding year at the organisation and for our services.

At 2022 we now employ a team of 26 dedicated people across 8 projects

Outside of the further development of our advocacy services this year, the greatest development has been that of our Organisational Structure; the establishment of a Leadership Team and extension of provision in the Core Department with the addition of a Finance Officer (Temitope Adebayo) and development of Peggy Spooner's role as Project Development Manager.

Achievements in Securing Funding:

We were able to achieve real progress in terms of securing funding for existing and new services during this reporting period with the following funding bids from grant foundations/organisations and statutory services:

3 County Independent Professional Advocacy: During this financial year we were able to put together a strong partnership with Age Cymru Dyfed, Carmarthenshire People First, Carer's Trust Crossroads West Wales and Dewis CIL, and successfully bid, as leading provider/bidder, for the 3 County IPA Service under the Social Services and Wellbeing Act. This service involves supporting people facing barriers to getting their views across, and undergoing care and support assessment, planning and review, safeguarding processes, and complaint about these. The service started 1.4.22 and will run for between 4 and 7 years.

Independent Mental Health Advocacy – 3 County: AWW has held this contract with Hywel Dda University Health Board since its inception in 2008. We were successful in the re-tender during this reporting period and the new contract, which will run for 3-5 years, started 1.4.22.

Continuation Funding – Ceredigion Community Mental Health Advocacy: What started in December 2020 as a pilot project has been extended through this period and up to March 2023.

Henry Smith – Independent Advocacy for People with a Learning Disability and Autistic People in Pembrokeshire: During this period we applied for dedicated funding for a 3 year project to enable sustainable funding for our existing service for PwLD and AP in Pembrokeshire. This is the first time this service will have had specific funding and confirms Pembrokeshire People First's trust in placing this service with us back in January 2021.

Lloyds Bank Foundation: As an organisation we have been funded by Lloyds Bank Foundation with a grant supporting our core department since 2019. We successfully applied for a final year of funding during this reporting period and the grant runs to April 2023. This funding has been critical in enabling us to support our management and non-advocacy roles and support our advocacy teams.

Hywel Davies Trust: Hywel Davies was a long time supporter of AWW (MAP as was) and it was with huge

Quote from a service user;

Thanks ...for being there to help me feel safe and supported, priceless

sadness that we learned of his death. We were very fortunate during this period to be given a small legacy from his estate. Later in this reporting period we were also invited to apply for funding from Hywel's residual estate to support a Pembrokeshire service. We made an application for 3 years funding for a Pembrokeshire Mental Health Advocacy Drop-in Service, mirroring the service funded by Tudor Trust in Carmarthenshire. We were successful in securing that funding and an additional award which will support our Core Department over the next few years. Our thanks to the Trustees of the fund and to Hywel.

Integrated Care Funding – Carers Support Innovation Fund – We were successful in securing a small award to support our work in developing a comprehensive Self-Advocacy Toolkit. Funding ran for a few months over winter in this reporting period and work continues to finalise the Toolkit ready for final consultation and publication. The Toolkit comprises a comprehensive set of methods and exercises to grow self-advocacy, whether solo or in conjunction with an advocate, and will ultimately be available in Welsh, English and Easy Read for anyone who needs it.

Integrated Care Funding – Learning Disability Innovation Fund – We were able to secure a small grant from this fund to continue support of our service in Pembrokeshire and piloted a new service My Wishes in Film involving advocacy and film making with people wanting to create a new way to inform professionals of their views and wishes. The funding enabled the pilot to run in the last 6 months of this reporting period. It was a significant learning exercise in how much work and additional skills are needed to produce meaningful videos on behalf of the people we support.

We were successful in every funding proposal submitted during 2021-2022.

Service Development:

Leadership Team Training and Team Reset Day: With the development of a new Organisational Structure over the last 12 months, a significant piece of training was put in place for the Leadership Team to support existing and new managers, and help us all work together as a team. It has also led to work to develop an AWW Team Charter with the aim of helping us consolidate our team and ensure a One Team approach.

Covid-19: The impact of the pandemic continued to be felt across AWW, by the people we support and more widely in our communities. We are pleased to have been able to maintain as much face to face service as we could in this period in a safe and managed way. We contributed to a Welsh sector wide survey and report in this period, following up on the original Valuing Voices report, which explored the ongoing impact of Covid-19 on the people we support, our teams and our services. Ongoing hybrid working (home/office) was aided by the development of our new client case management database which, after a long period of development, went live on the 1.7.21.

Wellbeing: Additional wellbeing support to our teams has been put in place with support from Welsh Government funded RCS for training, webinars, Wellbeing Action Plans and Wellbeing Champions drawn from our own team.

Arrivals and Departures: In the early part of this reporting period we welcomed Temitope Adebayo as Finance Officer, bringing back in house our finance support. Temi's support to Trustees and me in relation to the management account and finance governance of AWW and also to preparation of funding bids has been a welcome development.

We welcomed Abi Alexander, Rosie Culyer, Joanne Davies and Chloe Ellis to the team during this reporting period.

We said goodbye to Ellie-Jay Thomas last summer and more recently Ed Latter and Rachel Watt in Ceredigion and we welcomed Helen Hillary.

For a brief period we welcomed a new colleague to Ceredigion to fill the Independent Mental Health Advocacy role there. The person found the transition to the advocacy role impossible but his observations when he spoke to us as he moved on from AWW perhaps act as a reminder of who we are as an organisation and what we seek to achieve:

He spoke of the warm welcome and excellent support he had with us at AWW. He spoke of how he had never appreciated before just how tough it was in charities such as ours, the pressure we work under and how we must work to eek out every bit of value from the frozen funding we receive to maintain the standard of our services. He told of how we strive to go the extra mile for clients and the unique skill set an independent advocate must have to perform their role as required and how special those people who possess that skill set are. He spoke of listening in at a Health Board meeting during his induction and being overwhelmed by the excellent feedback about our services, and how well regarded we are as individuals and as a team. He recognised the challenges in settings where sometimes our role is welcomed and in others there is hostility to it, and how we maintain a focus on the client and a totally professional approach. He spoke of how in his future working life he will be telling his new colleagues how essential advocacy is for the people they support.

2022-2023 Work Plan for AWW:

Consolidation – Change and growth has kept coming at AWW during these last few years. It has been crucial to support our services, the people we support, and to make the organisation more resilient and sustainable long term. However with that change and growth come new challenges. We now need a period of consolidation and training focus to ensure that we are able to build our new expanded team together as one and ensure the quality of our work continues to meet the high standards we expect.

Community Mental Health Advocacy Services Re-commissioning – These services across the Hywel Dda University Health Board area go out to recommissioning in a few weeks in readiness for a new contract starting in April 2023. This is essential to AWW and we will be working hard to secure that new contract via the tendering process.

Quality Performance Mark – Re-accreditation with our industry standard Quality Performance Mark for Advocacy Services comes around every 3 years and comes around quickly. Later this year we restart the process of re-accreditation in readiness for a new award in the summer of 2023.

Thanks and Acknowledgements:

The organisation is grateful to Pembrokeshire Association of Voluntary Services for continuing to host our Haverfordwest office, University Wales TSD for hosting our new Carmarthen office at Yr Atom and Mike Harries of LM Griffiths for his ongoing service as Independent Examiner.

Our Chair Andy Watters has already extended thanks to our funders and I will echo that.

Finally, I would like to give special thanks to our entire team, both out on



Thank you. It was great to meet you today. It feels good to know I have some quality support to help me tackle difficulties at CMHT and GP. Thanks again,.

the front-line of advocacy and the support team here at Advocacy West Wales, for their dedication and expertise, and the strong team spirit that they display. They have shown remarkable adaptability and resilience during this period. I look forward to working with the whole team over the next year and to see the organisation continue to go from strength to strength for the benefit of those who rely upon our services.

I will briefly detail the key aspects of services for which I have management responsibility. Kate Bailey, AM, will report in relation to our community/non-statutory services.

Independent Mental Health Advocacy (IMHA): The service has again been impacted by Covid-19 during the whole of this reporting period. It is a credit to the team that they have been able to continue to meet the advocacy needs of patients through this period.

This service continues to receive incredibly good feedback from clients and commissioners/other stakeholders alike. Thanks must go to the dedicated team across AWW-EGC in providing this service and continuing to strongly advocate client views and seek to uphold their rights and entitlements in an increasingly difficult environment in health and social services.

We continue to work to improve delivery with ongoing training, awareness training to referrers, better ways of working.

Covid-19 saw the recommissioning of IMHA delayed for a 12 month period with a rollover for a like period. A challenge to the tender award led to further delay in the outcome but we were finally confirmed as the continuing provider of IMHA services in the Hywel Dda University Health Board area and the new contract started 1.4.22. With funding the same as it has been since inception of IMHA in 2008 there is significant pressure on the budget to meet outcomes and maintain the advocacy hours and service quality.

Quote from service user;

you are so supportive and just for me, not judging me, you help me understand what's happening and I need that as I don't always understand documents and reports and what is happening

Three County Independent Professional Advocacy: This new service was put out to tender by the three local authorities in September last year.

AWW was already a provider of the individually contracted service in Ceredigion and an aspect of the service in Carmarthenshire.

We moved quickly to establish a collaboration between all existing providers in the area- ourselves, Age Cymru Dyfed, Carmarthenshire People First, Carers Trust Crossroads West Wales and Dewis CIL – and to jointly tender for the three county service, with AWW as the lead provider on the contract.

We were successful and the new contract started in April this year and runs for a minimum 4, maximum 7 years.

The service receives regular referrals across a range of care and support needs and issues but much work is to be done on developing the partnership, our capacity and referral levels to ensure the maximum number of people can access high quality advocacy in a timely way.



Natasha Fox, Chief Officer, September 2022

COMMUNITY REPORT APRIL 2021- MARCH 2022

It has been a year of continuing to navigate through, and start emerging from, the pandemic. Like all areas of life, the pandemic has still had its impact during this period.

Risk assessing and reviewing guidance has been key to continue to keep all service users and advocates safe. A lot of learning on our feet had to happen in 2020. However, during this period, we had the opportunity to utilise what worked well. One aspect has been blended working. This allows advocates to continue to be flexible in relation to where they carry out their work outside of face to face visits and meetings. Some advocates prefer to be office based and others work from home. All advocates have the technology and the IT support to make this flexibility possible.

I will take this opportunity to provide a more specific update for all our community services:

The Community Mental Health Advocacy Service - Pembrokeshire

This service continues to be extremely busy. The structure of weekly allocation meetings, client caseworkers supporting with low level advocacy and signposting /referring on has been essential. Most of the year we have been able to manage service user needs for this service and limited capacity of advocates with the support of the Client Caseworkers. They have been fantastic at keeping in touch with clients if there have been any delays in a 1:1 advocate being available to them. However, in December 2021, for the first time every at AWW, we finally got to the point where a waiting list was unavoidable. This was managed carefully within the new database and contact was made with all who were placed on this. We were able to end this in early January. The service has also had some staff changes. Rebecca Arnold left the community team to become Pembrokeshire IMHA. We welcomed Abi Alexander to the team at the very end of 2021.

Quote from a service user;

Thank you. Life would be far less stressful if people had the listening skills which you have expressed this year.

The Community Mental Health Advocacy Service - Carmarthenshire

We had focussed on the need to promote the service and increase links again with the local CMHT's with the aim to increase referrals from them. On reviewing the stats through the year, we have continued to be pleased with the positive increase in referrals. After quite a difficult period for the service it has been a good year of consolidation. We were pleased to welcome Elaine Lewis back to the service as a full-time community advocate alongside Clare Singleton. This has meant the service has been back up to full strength now for some time. We had a review of the service and agreed an outcome from this is to help move forward to build a one team approach for the community services. We have our first all community service review on Wednesday 14th September 2022.

Ceredigion All Age Community Advocacy Service

Since its development in December 2020, the All age service has gone from strength to strength. It has built good working relationships with a wide range of services that regularly refer into the service for

example CMHT, Local Authority, University. The service consistently works with an average of 40 clients a month.

Carers' Advocacy Service in Carmarthenshire

This service continued to steadily build and when Elaine moved on we welcomed Natalie Sen our former cover advocate into the Carers Advocacy post. Natalie worked alongside Peggy in the promotion and networking within cares services in the county. It however came to an end in this form at the end of March 2022 as it is now included within the 3 County Independent Professional Advocacy Service (3CIPA).

Service for People with a Learning Disability and Autistic People

This service has been steadily busy throughout the year although referral levels can fluctuate at times the needs of the service users are often extremely complex. A lot of work took place throughout the year to identify funding opportunities for this service to continue and develop. This led to an application being submitted to the Henry Smith Charity at the beginning of 2022. I am very pleased to say that this was successful, and the service now has secure funding until 2025.

Carmarthenshire Tudor Trust Drop in Service

Amy Tynan joined AWW in July 2021 in her role as the Tudor Trust Drop-In advocate. She worked an advocacy induction and also worked very closely with Peggy Spooner, our then Project Development Officer, to network with other local services and get the service up and running. The Drop-In service continues to run in Carmarthen, Llanelli and Ammanford. The drop-in advocate builds up their own caseload from those they support at Drop-In. We are very appreciative of the ongoing working relationships we have with Links and Adferiad.

Pembrokeshire Hywel Davies Trust Drop-In Service

At the beginning of 2022, AWW was approached by the Hywel Davies Trust to put in an application for funding a new service within Pembrokeshire. Based on the value and success we had seen in the Carmarthenshire Drop-In service it was felt this would be an ideal opportunity to develop a service in Pembrokeshire. I am happy to report that this application for 3 years funding was successful and the new drop in advocate Helen Hillary came into post on the 1st August 2022.

Kate Bailey - Assistant Manager

Quote from a service user;

Without your professional guidance, I would not be aware of what my options are. Over the past few months, my anxiety has got much worse. the help being provided is making a massive difference in my life

Quote from a service user;

Without you directing myself to essential sources of information regarding my rights. I would very likely be off sick from work with terrible anxiety. Advocacy has been there for myself at a time when my physical and mental health has been challenged. Every time you ring, I am clearer on my rights

Trustees

Andy Watters, Chair

Carolyn Oakley, Treasurer

Jane Kelso, Trustee

Andrew Armstrong, Trustee (resigned June 2021)

Helen Butland, Trustee

Emlyn Sciafone, Vice-Chair

Dinah Davies, Trustee (resigned July 21)

Huw Michael, Trustee (resigned August 21)

David Jones, Trustee (resigned August 21)

~~~~~

### Staff Team

Natasha Fox, Chief Officer

Kate Bailey, Deputy Manager

Sue Blantern, Office Manager/Administrator

Andrea Potter, Supervisor/IMHA Carmarthenshire

Nia Williams, Supervisor/IMHA, Carmarthenshire

Sarah Thomas, IMHA, Carmarthenshire

Sue Williams, CCW /Advocate

Ed Latter, Supervisor Ceredigion (resigned June 22)

Ian Rees, IMHA Carmarthenshire

Rebecca Arnold, Community Advocate/IMHA  
Pembrokeshire

Jayne Edwards, Information Officer

Clare Singleton, Community Advocate,  
Carmarthenshire

Peggy Spooner, Client Caseworker/Project  
Development worker

Elaine Lewis, Community Advocate,  
Carmarthenshire

Ellie-Jay Thomas, Advocate (resigned August 21)

Pete Irvine, LD & AP Advocate

Kate Roberts, Community Advocate,  
Pembrokeshire

Shelly Newton, LD & AP Advocate

Kate Isherwood, LD advocate (Jan-May 21)

Rachel Watt, IMHA/CIPA (resigned June 22)

Ceridwen Kabir, Community Advocate Ceredigion  
(from Jan 21)

Temitope Adebayo, Finance Officer (from March 21)

Amy Tynan, Community Advocate,  
Carmarthenshire (from July 21)

Natalie Sen, IMHA/Community Carmarthenshire  
(from July 21)

Abi Alexander, Independent Advocate (from  
December 2021)

Rosie Culyer, Independent Advocate (from March  
2022)

Joanne Davies, CCW (from March 2022)

Chloe Ellis, CCW (from April 2022)

Helen Hillary, Advocate (from August 2022)



# With thanks to our Funders





**Advocacy West Wales**  
**Eiriolaeth Gorllewin Cymru**

*A voice when you need it most*  
*Llais pan fydd ei angen arnoch fwyaf*

**CHARITY REGISTRATION NUMBER: 1172200**

**REPORTS AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MARCH 2022  
FOR  
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited  
Chartered Certified Accountants  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**FINANCIAL STATEMENTS**  
**for the year ended 31 March 2022**

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**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2022**

**Structure, Governance and Management**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

**History**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

**Objectives and activities for the public benefit**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) providing advocacy services for adults experiencing mental health issues, for older people with mental health issues and/or dementia, for adults with a learning disability or autism, and for children and young people with mental health issues.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2022**

**Achievements and Performance**

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- adults including older people in Pembrokeshire and in Carmarthenshire including Carers (since 1/3/20)
  - IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
  - Independent Professional Advocacy in Ceredigion
  - Tudor Trust Drop In Services Carmarthenshire from April 2021 to March 2022
  - All ages Community Mental Health, Ceredigion from December 2020
  - Adults with a learning disability or autism, Pembrokeshire (following a transfer from PPF 1/1/2021)
- AWW-EGC merged with Eiriol Mental Health Advocacy from 1/3/20
- All current services that were due for retender or new funding during this reporting period were successful and are now in receipt of the funding

**Financial Review**

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Local Health Board, Ceredigion County Council, Lloyds Bank Foundation, Carmarthenshire County Council, Tudor Trust, Enhancing Pembrokeshire, West Wales Care Partnership (WWCP).

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £591,330.

**Reserves Policy**

The current policy is to hold reserves equivalent to:

3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £87,321 and restricted reserves amounted to £116,271

**Future Developments**

Hywel Davies Drop In services for Pembrokeshire . Henry Smith 3 year funding for the Pembrokeshire Adults with a Learning Disability and Autistic People Service.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2022**

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

.....  
A Watters, Chairperson

Date: .....

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2022**

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2022.

**REFERENCE & ADMINISTRATIVE DETAILS**

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

Andy Watters  
Carolyn Oakley  
Jane Kelso  
Helen Butland  
Emlyn Sciavone

Chair  
Treasurer

Accountants

L M Griffiths & Co Ltd  
Chartered Certified Accountants  
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers

CAF Bank Ltd  
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**INDEPENDENT EXAMINER'S REPORT**  
**31 March 2022**

**Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru**

I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (the Trust) for the year ended 31 March 2022.

**Responsibilities and basis of report**

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

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

**Independent examiner's statement**

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body, I can confirm that I am qualified to undertake the examination because I am a registered member of ACCA which is one of the listed bodies.

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

Michael Harries FCCA  
L M Griffiths & Co Ltd  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**STATEMENT OF FINANCIAL ACTIVITIES**  
for the year ended 31 March 2022

|                                                       | Notes | Unrestricted<br>funds | Designated<br>&<br>Restricted<br>funds | Total<br>funds<br>2022 | Total<br>funds<br>2021 |
|-------------------------------------------------------|-------|-----------------------|----------------------------------------|------------------------|------------------------|
|                                                       |       | £                     | £                                      | £                      | £                      |
| <b>INCOMING RESOURCES</b>                             |       |                       |                                        |                        |                        |
| <b>Incoming resources from generated funds:</b>       |       |                       |                                        |                        |                        |
| Voluntary income                                      | 3     | 9,011                 | -                                      | 9,011                  | 47,422                 |
| Investment income                                     | 4     | 67                    | -                                      | 67                     | 52                     |
| <b>Incoming resources from charitable activities:</b> |       |                       |                                        |                        |                        |
| Grants & contracts                                    | 5     | -                     | 582,252                                | 582,252                | 608,527                |
| <b>Total incoming resources</b>                       |       | 9,078                 | 582,252                                | 591,330                | 656,001                |
| <b>RESOURCES EXPENDED</b>                             |       |                       |                                        |                        |                        |
|                                                       | 15    |                       |                                        |                        |                        |
| <b>Charitable activities</b>                          |       | 88,226                | 578,882                                | 667,108                | 516,275                |
| <b>Total resources expended</b>                       |       | 88,226                | 578,882                                | 667,108                | 516,275                |
| <b>NET INCOMING RESOURCES before transfers</b>        |       | (79,148)              | 3,370                                  | (75,778)               | 139,726                |
| <b>Gross transfers between funds</b>                  | 12&13 | 90,394                | (90,394)                               | -                      | -                      |
| <b>Net incoming /(outgoing) resources</b>             |       | 11,246                | (87,024)                               | (75,778)               | 139,726                |
| <b>RECONCILIATION OF FUNDS</b>                        |       |                       |                                        |                        |                        |
| <b>Funds brought forward</b>                          |       | 75,628                | 203,295                                | 278,923                | 139,197                |
| <b>TOTAL FUNDS CARRIED FORWARD</b>                    | 12    | 86,874                | 116,271                                | 203,145                | 278,923                |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**BALANCE SHEET**  
**As at 31 March 2022**

|                                               | Notes | Unrestricted<br>funds | Restricted<br>income<br>funds | Total this<br>year<br>2022<br>£ | Total last<br>year<br>2021<br>£ |
|-----------------------------------------------|-------|-----------------------|-------------------------------|---------------------------------|---------------------------------|
|                                               |       | £                     | £                             |                                 |                                 |
| <b>FIXED ASSETS</b>                           |       |                       |                               |                                 |                                 |
| Tangible assets                               | 9     | 3                     | 3,129                         | 3,132                           | 545                             |
|                                               |       | 3                     | 3,129                         | 3,132                           | 545                             |
| <b>CURRENT ASSETS</b>                         |       |                       |                               |                                 |                                 |
| Debtors : Amounts falling due within one year | 10    | -                     | -                             | -                               | 39,776                          |
| Cash at bank and in hand                      |       | 86,871                | 129,283                       | 216,154                         | 241,141                         |
|                                               |       | 86,871                | 129,283                       | 216,154                         | 280,917                         |
| <b>CREDITORS</b>                              |       |                       |                               |                                 |                                 |
| Amounts falling due within one year           | 11    | -                     | 16,141                        | 16,141                          | 2,539                           |
| <b>NET CURRENT ASSETS</b>                     |       | 86,871                | 113,142                       | 200,013                         | 278,378                         |
| <b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>  |       | 86,874                | 116,271                       | 203,145                         | 278,923                         |
| <b>FUNDS</b>                                  | 12    |                       |                               |                                 |                                 |
| Unrestricted funds                            |       | 86,874                | -                             | 86,874                          | 75,628                          |
| Restricted funds                              |       | -                     | 116,271                       | 116,271                         | 203,295                         |
| <b>TOTAL FUNDS</b>                            |       | 86,874                | 116,271                       | 203,145                         | 278,923                         |

The financial statements were approved by the trustees on \_\_\_\_\_ and were signed on its behalf by:

\_\_\_\_\_  
A Watters, Chair

\_\_\_\_\_  
C Oakley, Treasurer

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2022**

**1 Basis of preparation**

**1.1 Basis of accounting**

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.

**1.2 Change in basis of accounting**

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

**2 Accounting policies**

**2.1 Incoming resources**

**Recognition of incoming resources**

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

**Incoming resources with related expenditure**

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

**Grants and donations**

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

**Tax reclaims on donations and gifts**

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

**Contractual income and performance related grants**

This is only included in the SoFA once the related goods or services have been delivered.

**Gifts in kind**

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

**Donated services and facilities**

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

**Volunteer help**

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

**Investment income**

This is included in the accounts when receivable.

**Investment gains and losses**

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

**2.2 Expenditure & liabilities**

**Liability recognition**

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

**Governance costs**

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

**2.3 Assets**

**Tangible fixed assets for use by charity**

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt. Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

| <b>3 VOLUNTARY INCOME</b> | <b>2022</b>               |                               |              | <b>2021</b>  |
|---------------------------|---------------------------|-------------------------------|--------------|--------------|
|                           | <b>Designated</b>         |                               |              | <b>Total</b> |
|                           | <b>Unrestricted Funds</b> | <b>&amp; Restricted Funds</b> | <b>Total</b> |              |
|                           | <b>£</b>                  | <b>£</b>                      | <b>£</b>     |              |
| Other income              | 8,011                     | -                             | 8,011        | 47,024       |
|                           | 8,011                     | -                             | 8,011        | 47,024       |

| <b>4 INVESTMENT INCOME</b> | <b>2022</b> | <b>2021</b> |
|----------------------------|-------------|-------------|
|                            | <b>£</b>    | <b>£</b>    |
| Deposit account interest   | 67          | 52          |

| <b>5 GRANTS &amp; CONTRACTS</b> | <b>2022</b>               |                               |              | <b>2021</b>  |
|---------------------------------|---------------------------|-------------------------------|--------------|--------------|
|                                 | <b>Designated</b>         |                               |              | <b>Total</b> |
|                                 | <b>Unrestricted Funds</b> | <b>&amp; Restricted Funds</b> | <b>Total</b> |              |
|                                 | <b>£</b>                  | <b>£</b>                      | <b>£</b>     |              |
| Community P                     | -                         | 74,312                        | 74,312       | 77,183       |
| Community C                     | -                         | 92,414                        | 92,414       | 93,174       |
| Community Ceredigion            | -                         | 33,368                        | 33,368       | 67,576       |
| ICF                             | -                         | -                             | -            | 3,757        |
| IMHA                            | -                         | 201,697                       | 201,697      | 198,257      |
| Carers                          | -                         | 36,253                        | 36,253       | 35,996       |
| PPF                             | -                         | 18,605                        | 18,605       | 49,000       |
| Ceredigion CIPA                 | -                         | 70,882                        | 70,882       | 70,247       |
| Lloyds                          | -                         | 25,000                        | 25,000       | -            |
| Tudor                           | -                         | 29,721                        | 29,721       | 13,337       |
| Sue Evans/CYP                   | -                         | -                             | -            | -            |
|                                 | -                         | 582,252                       | 582,252      | 608,527      |

| <b>6 NET INCOMING/(OUTGOING) RESOURCES</b> | <b>2022</b> | <b>2021</b> |
|--------------------------------------------|-------------|-------------|
|                                            | <b>£</b>    | <b>£</b>    |
| Net resources are stated after charging:   |             |             |
| Accountancy fees                           | 1,240       | 3,174       |
| Depreciation                               | 1,783       | 612         |

**7 TRUSTEES' REMUNERATION AND BENEFITS**

There were no trustees' remuneration or other benefits for the year ended 31 March 2022 nor for the year ended 31 March 2021.

|                                       | <b>2022</b> | <b>2021</b> |
|---------------------------------------|-------------|-------------|
|                                       | <b>£</b>    | <b>£</b>    |
| Trustees' expenses                    | 102         | 22          |
| Number of trustees receiving expenses | 1           | 1           |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2022**

|                      |             |             |
|----------------------|-------------|-------------|
| <b>8 STAFF COSTS</b> | <b>2022</b> | <b>2021</b> |
|                      | £           | £           |

|                    |         |         |
|--------------------|---------|---------|
| Wages and salaries | 555,865 | 430,594 |
|--------------------|---------|---------|

|                                                                         |             |             |
|-------------------------------------------------------------------------|-------------|-------------|
| The average monthly number of employees during the year was as follows: | <b>2022</b> | <b>2021</b> |
|-------------------------------------------------------------------------|-------------|-------------|

|           |    |    |
|-----------|----|----|
| Full time | 4  | 2  |
| Part time | 20 | 19 |
|           | 24 | 21 |

There were no employees with salaries in excess of £60,000

**9 TANGIBLE FIXED ASSETS**

|                       | Fixtures<br>and fittings<br>£ | Computer<br>equipment<br>£ | Total<br>£ |
|-----------------------|-------------------------------|----------------------------|------------|
| <b>COST</b>           |                               |                            |            |
| At 1 April 2021       | 1,190                         | 21,716                     | 22,906     |
| Additions             | -                             | 4,370                      | 4,370      |
|                       | 1,190                         | 26,086                     | 27,276     |
| At 31 March 2022      |                               |                            |            |
| <b>DEPRECIATION</b>   |                               |                            |            |
| At 1 April 2021       | 1,190                         | 21,171                     | 22,361     |
| Charge for year       | -                             | 1,783                      | 1,783      |
|                       | 1,190                         | 22,954                     | 24,144     |
| At 31 March 2022      |                               |                            |            |
| <b>NET BOOK VALUE</b> |                               |                            |            |
| At 31 March 2022      | -                             | 3,132                      | 3,132      |
| At 31 March 2021      | -                             | 545                        | 545        |

|                                                        |             |             |
|--------------------------------------------------------|-------------|-------------|
| <b>10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2022</b> | <b>2021</b> |
|                                                        | £           | £           |

|                                      |   |        |
|--------------------------------------|---|--------|
| Amounts falling due within one year: | - | 39,776 |
|                                      | - | 39,776 |

|                                                          |             |             |
|----------------------------------------------------------|-------------|-------------|
| <b>11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2022</b> | <b>2021</b> |
|                                                          | £           | £           |

|                 |        |       |
|-----------------|--------|-------|
| Accruals        | 1,240  | 1,194 |
| Other creditors | 14,901 | 1,345 |
|                 | 16,141 | 2,539 |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2022**

**12 MOVEMENT IN FUNDS**

|                           | <b>At 01.04.21</b> | <b>Funds brought forward at 01.04.21<br/>£</b> | <b>Net movement in funds<br/>£</b> | <b>Transfers between funds<br/>£</b> | <b>At 31.03.22<br/>£</b> |
|---------------------------|--------------------|------------------------------------------------|------------------------------------|--------------------------------------|--------------------------|
| <b>Unrestricted funds</b> |                    |                                                |                                    |                                      |                          |
| General fund              | -                  | 75,628                                         | (79,148)                           | 90,394                               | 86,874                   |
| <b>Restricted funds</b>   |                    |                                                |                                    |                                      |                          |
| Restricted income funds   | -                  | 203,295                                        | 3,370                              | (90,394)                             | 116,271                  |
| <b>TOTAL FUNDS</b>        | <b>-</b>           | <b>278,923</b>                                 | <b>(75,778)</b>                    | <b>-</b>                             | <b>203,145</b>           |

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

|                           | <b>Incoming resources<br/>£</b> | <b>Resources expended<br/>£</b> | <b>Movement in funds<br/>£</b> |
|---------------------------|---------------------------------|---------------------------------|--------------------------------|
| <b>Unrestricted funds</b> |                                 |                                 |                                |
| General fund              | 9,078                           | 88,226                          | (79,148)                       |
| <b>Restricted funds</b>   |                                 |                                 |                                |
| Restricted income funds   | 582,252                         | 578,882                         | 3,370                          |
| <b>TOTAL FUNDS</b>        | <b>591,330</b>                  | <b>667,108</b>                  | <b>(75,778)</b>                |

**13 TRANSFERS BETWEEN FUNDS**

Transfers were made from WCVA, Ceredigion CIPA, ICF, Tudor Trust, Community Ceredigion, Lloyds, PPF and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

**14 FUND DEFICITS**

As at the year end 31 March 2022, no funds were in a deficit position

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2022**

**15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES**

|                                                  | Unrestricted funds | Restricted Funds |             |                      |       |          |         |          |          |                 | 2022    | 2021        |             |
|--------------------------------------------------|--------------------|------------------|-------------|----------------------|-------|----------|---------|----------|----------|-----------------|---------|-------------|-------------|
|                                                  | Reserves           | Community P      | Community C | Community-Ceredigion | ICF   | IMHA     | Carers  | Lloyds   | PPF      | Ceredigion CIPA | Tudor   | Total funds | Total funds |
|                                                  | £                  | £                | £           |                      | £     | £        | £       |          |          | £               | £       | £           | £           |
| INCOMING RESOURCES                               |                    |                  |             |                      |       |          |         |          |          |                 |         |             |             |
| Voluntary & other income                         | 8,011              | 74,312           | 92,414      | 33,368               |       | 201,697  | 36,253  | 25,000   | 18,605   | 70,882          | 29,721  | 590,263     | 652,061     |
| Government Grants                                | 1,000              | -                | -           | -                    |       | -        | -       | -        | -        | -               | -       | 1,000       | 3,888       |
| Investment income                                | 67                 |                  |             |                      |       |          |         |          |          |                 |         | 67          | 52          |
| Total incoming resources                         | 9,078              | 74,312           | 92,414      | 33,368               | -     | 201,697  | 36,253  | 25,000   | 18,605   | 70,882          | 29,721  | 591,330     | 656,001     |
| RESOURCES EXPENDED                               |                    |                  |             |                      |       |          |         |          |          |                 |         |             |             |
| Charitable activities                            |                    |                  |             |                      |       |          |         |          |          |                 |         |             |             |
| Salaries & wages                                 | 62,402             | 64,298           | 69,614      | 40,222               |       | 147,353  | 27,659  |          | 43,194   | 34,911          | 13,596  | 503,249     | 387,145     |
| Travel expenses                                  | 525                | 1,327            | 903         | 2,028                |       | 7,219    | 955     |          | 1,724    | 887             | 382     | 15,950      | 7,372       |
| Training / Recruitment                           | 1,390              | 42               |             | 90                   |       | 95       |         |          |          | 165             | 11      | 1,793       | 2,139       |
| CRB Checks                                       | 60                 | 67               | 25          | 27                   |       | 145      |         |          | 71       | 46              |         | 441         | 238         |
| Subscriptions                                    | 595                |                  |             |                      |       |          |         |          |          |                 |         | 595         | 270         |
|                                                  | 64,972             | 65,734           | 70,542      | 42,367               | -     | 154,812  | 28,614  | -        | 44,989   | 36,009          | 13,989  | 522,028     | 397,164     |
| Support costs                                    |                    |                  |             |                      |       |          |         |          |          |                 |         |             |             |
| Salaries & wages                                 | 662                | 6,891            | 8,599       | 3,087                |       | 18,797   | 3,418   |          | 1,736    | 6,615           | 2,811   | 52,616      | 43,449      |
| Training                                         |                    |                  |             |                      |       |          |         |          |          |                 |         | -           | 1,816       |
| Rent                                             | 4,843              | 1,200            | 2,007       | 866                  |       | 3,553    | 675     |          | 923      | 700             | 562     | 15,329      | 14,404      |
| Heat & light                                     | 241                |                  | 89          |                      |       | 142      | 34      |          | 3        |                 | 31      | 540         | 862         |
| Room hire                                        | 174                | 64               | 84          | 53                   |       | 96       | 45      |          |          | 53              | 3       | 572         | -           |
| Cleaning                                         | 164                |                  |             |                      |       | 15       |         |          |          |                 |         | 179         | 596         |
| Insurance                                        | 5,369              |                  |             |                      |       | 282      |         |          |          |                 |         | 5,651       | 2,965       |
| Telephone                                        | 1,623              | 941              | 815         | 635                  |       | 2,628    | 602     |          | 514      | 540             | 857     | 9,155       | 6,439       |
| Postage, stationery & advertising                | 668                | 222              | 336         | 105                  |       | 601      | 283     |          | 193      | 115             | 258     | 2,781       | 2,874       |
| Website & computing costs                        | 2,332              | 2,790            | 2,780       | 1,366                |       | 4,100    | 1,064   |          | 944      | 1,746           | 1,000   | 18,122      | 5,420       |
| Equipment                                        | 270                | 55               | 224         | 118                  |       | 250      | 180     |          | 32       | 26              | 133     | 1,288       | 5,411       |
| Sundries                                         | 32                 |                  | 25          |                      |       | 44       | 8       |          |          |                 | 8       | 117         |             |
| Professional fees                                | 4,126              | 326              | 326         | 206                  |       | 1,262    | 120     |          | 239      | 27,202          | 109     | 33,916      | 30,548      |
| Bank charges                                     | 96                 |                  |             |                      |       |          |         |          |          |                 |         | 96          | 69          |
| AGM/Staff welfare                                | 820                |                  |             |                      |       |          |         |          |          |                 | 773     | 1,593       | 450         |
| Accountancy                                      | 1,240              |                  |             |                      |       |          |         |          |          |                 |         | 1,240       | 3,174       |
| Trustees' expenses                               | 102                |                  |             |                      |       |          |         |          |          |                 |         | 102         | 22          |
| Depreciation - fixtures & fittings               |                    |                  |             |                      |       |          |         |          |          |                 |         | -           | -           |
| Depreciation - computer eqpt                     | 492                | 170              | 48          |                      |       | 332      | 38      |          | 87       | 446             | 170     | 1,783       | 612         |
|                                                  | 23,254             | 12,659           | 15,333      | 6,436                | -     | 32,102   | 6,467   | -        | 4,671    | 37,443          | 6,715   | 145,080     | 119,111     |
| Total resources expended                         | 88,226             | 78,393           | 85,875      | 48,803               | -     | 186,914  | 35,081  | -        | 49,660   | 73,452          | 20,704  | 667,108     | 516,275     |
| NET INCOMING/OUTGOING RESOURCES before transfers |                    |                  |             |                      |       |          |         |          |          |                 |         |             |             |
|                                                  | (79,148)           | (4,081)          | 6,539       | (15,435)             | -     | 14,783   | 1,172   | 25,000   | (31,055) | (2,570)         | 9,017   | (75,778)    | 139,726     |
| Gross transfers between funds                    | 90,394             | (8,677)          | (10,785)    | (7,538)              | -     | (23,670) | (4,302) | (25,000) | (1,698)  | (5,184)         | (3,540) | -           | -           |
| Net incoming/(outgoing) resources                | -                  | -                | -           |                      | -     |          | -       |          |          | -               |         | (75,778)    | 139,726     |
| Funds brought forward                            | 75,628             | 45,469           | 14,980      | 45,953               | 3,668 | 35,688   | 3,273   | -        | 39,234   | 12,769          | 2,261   | 278,923     | 139,197     |
| Funds carried forward                            | 86,874             | 32,711           | 10,734      | 22,980               | 3,668 | 26,801   | 143     | -        | 6,481    | 5,015           | 7,738   | 203,145     | 278,923     |

# Advocacy West Wales — Eiriolaeth Gorllewin Cymru



## ADRODDIAD BLYNYDDOL 2021 - 2022

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## **Adroddiad y Cadeirydd 2021-2022**

Yn groes i'n gobeithion, am yr ail flwyddyn, mae'r pandemig Covid-19 wedi cyflwyno'r her fwyaf i'r Elusen, ei staff a'i chleientiaid, ac mae ymchwyddiadau cyson wedi mynnu newidiadau i gynlluniau strategol ac arferion gwaith. Mae'r tîm wedi cydweithio'n agos wrth ymateb i ganllawiau Llywodraeth Cymru ac wrth addasu i'r newidiadau hyn, nid yn unig yn y gwaith ond yn eu bywydau personol hefyd.

Eleni, fe wnaethom barhau i ddefnyddio cronfa Grant Lles Ymddiriedolaeth Tudor i gynorthwyo'r tîm gyda nifer o weithgareddau, a gynlluniwyd i roi rhyddhad derbyniol iawn a chyfleoedd i ddod at ein gilydd mewn grwpiau bach.

Byddwn yn parhau i addasu i sialensiau Covid-19 wrth i'r gaeaf ein cyrraedd.

Ar nodyn mwy cadarnhaol, rydym wedi parhau i ddarparu gwasanaeth i'n cleientiaid, sydd wedi'i ganmol a'i gymeradwyo gan Gomisiynwyr a rhanddeiliaid eraill mewn adolygiadau gwasanaeth, er gwaethaf y sialensiau a ddaeth i'n rhan yn y flwyddyn ddiwethaf.

Rydym wedi ail-dendro'n llwyddiannus am gontractau gwasanaeth, yn fwyaf nodedig i barhau i ddarparu'r gwasanaeth Eiriolaeth Iechyd Meddwl Annibynnol (IMHA) o fis Ebrill 22 am y 3-5 mlynedd nesaf, a gwasanaeth Eiriolaeth Annibynnol y Tair Sir (3CIPA) ar y cyd â'n partneriaid, o fis Ebrill 22 am 4-7 mlynedd.



Hoffwn dalu teyrnged i'n cefnogwr hirdymor, y diweddar Hywel Davies, y mae ei gymynrodd sylweddol wedi ein galluogi i ddechrau gwasanaeth "Galw Heibio Eiriolaeth Iechyd Meddwl" i bobl yn Sir Benfro yn ddiweddar iawn.

Derbyniwyd grantiau hael eraill oddi wrth Ymddiriedolaeth Tudor a Sefydliad Banc Lloyds yn ystod y cyfnod adrodd hwn. Mae'r rhain wedi galluogi AWW-EGC i atgyfnerthu rhai gwasanaethau, cynorthwyo adrannau craidd, a datblygu meysydd eraill.

Dros y blynyddoedd diwethaf, o dan arweiniad ein Prif Swyddog Natasha Fox, a'r Rheolwr Cynorthwyol Kate Bailey, mae AWW-EGC wedi ehangu'n sylweddol, ond trwy'r newidiadau hyn mae'r elusen wedi parhau i fod yn sefydlog yn ariannol ac wedi'i rheoli'n ddarbodus, fel y bydd yr adroddiad gan yr Archwilydd Annibynnol yn cadarnhau. Fodd bynnag, mae yna beryglon wrth newid yn sydyn ac mae'r Uwch Dîm Rheoli a'r Ymddiriedolwyr wedi cytuno bod cyfnod o gydgyfnerthu'n ddoeth, er mwyn cynnal ein safonau uchel a sicrhau eu bod yn gyson ac yn gynaliadwy.

Eleni eto, bydd AWW-EGC yn cael ei asesu o ran cydnerthedd ac ansawdd gan yr archwiliad Marc Perfformiad Ansawdd (QPM), sy'n rhan annatod o'n polisi Sicrwydd Ansawdd, ac yn ofyniad ar gyfer llawer o'n gwasanaeth.

Wrth edrych i'r dyfodol, y sialens fawr i bob un ohonom, yr Ymddiriedolwyr, y staff a'r sefydliad, fydd yr argyfwng ariannol y mae pob un ohonom yn ei wynebu, ac a fydd yn anffodus yn cael effaith sylweddol ar iechyd meddwl llawer o bobl. I'r mudiad, mae hyn wedi'i osod yn erbyn cefndir o gyllid wedi'i rewi ers dros ddegawd. Rydym wedi gorfod dibynnu ar "arbedion effeithlonrwydd" i gynnal yr un lefel o wasanaeth i'n cleientiaid. Rwy'n hyderus, fodd bynnag, y byddwn yn ymdopi ac yn addasu i'r amgylchiadau newidiol, wrth hyrwyddo'r angen am gyllid cynaliadwy i sefydliadau comisiynu.

Mae fy hyder yn seiliedig ar arweinyddiaeth strategol ein Prif Swyddog Natasha Fox a'r Tîm Rheoli, sydd

wedi'u cefnogi'n fedrus gan y Tîm ardderchog.

Yn olaf, hoffwn ddiolch i'm cydweithwyr ar Fwrdd yr Ymddiriedolwyr am eu cefnogaeth a'u hymroddiad parhaus, i Helen Butland am recriwtio staff, i Caroline Evans, Jane Kelso, y Trysorydd Anrhydeddus Carolyn Oakley a'r Is-gadeirydd Emlyn Schiavone.



Andrew Watters  
Cadeirydd, AWW-EGC

### **Adroddiad y Trysorydd 2021- 2022**

Cyfanswm incwm y flwyddyn oedd £591,330 (£656,001 yn 2021 – roedd hyn yn cynnwys derbyniadau ymlaen llaw ar gyfer prosiectau a gyflawnwyd wedyn yn 2021-2022, a chronfeydd wrth gefn ar ôl trosglwyddo'r gwasanaeth o Pobl yn Gyntaf Sir Benfro). Cyfanswm y gwariant oedd £666,661 (£516,275 yn 2021) gan roi diffyg ariannol ar gyfer y flwyddyn o £75,331 (gwarged o £176,118 yn 2021). Cyfanswm yr arian a gariwyd ymlaen oedd £203,592 (£278,923 yn 2021). Eglurir y cynnydd mewn gwariant rhwng 20-21 a 21-22 gan y cynnydd mewn prosiectau a gyflawnwyd, a'r cynnydd canlyniadol yn y tîm staff.

Fodd bynnag, erys AWW-EGC yn sefydlog iawn yn ariannol ac mae parch mawr gan ein hystod lawn o arianwyr tuag at y mudiad o hyd. Maent yn hyderus y bydd defnydd da yn cael ei wneud o'u harian, trwy ddarparu ystod y wasanaethau eiriolaeth ardderchog ar draws y tair sir, sef Sir Gaerfyrddin, Ceredigion a Sir Benfro.

Hoffem ddiolch i bawb sydd wedi darparu cyllid ar gyfer niferus brosiectau AWW-EGC: Bwrdd Iechyd Prifysgol Hywel Dda, Cyngor Sir Ceredigion, Sefydliad Banc Lloyds, Cyngor Sir Gâr, Ymddiriedolaeth Tudor, Gwella Sir Benfro, a Phartneriaeth Gofal Gorllewin Cymru (WWCP). Mae Eiriolaeth Gorllewin Cymru wedi bod yn ffodus i ddenu rhai rhoddion hefyd. Mae Datblygiadau'r Dyfodol yn cynnwys gwasanaethau Galw Heibio Hywel Davies ar gyfer Sir Benfro, a chyllid am 3 blynedd gan Henry Smith ar gyfer Gwasanaeth Sir Benfro i Bobl ag Anabledd Dysgu a Phobl Awtistig.

Diolch i Temitope Adebayo am ei mewnbwn amhrisiadwy fel Swyddog Cyllid. Mae'n dipyn o gamp monitro'r holl adrannau gwahanol sydd wedi cynyddu'n sylweddol mewn nifer ar ôl yr uno, a chyda datblygiad gwasanaethau newydd ar draws ardal ddaearyddol ehangach. Mae'n darparu cyfrifon rheoli rheolaidd i'r Prif Swyddog a'r Ymddiriedolwyr. Diolchwn hefyd i Sue Blanter, Rheolwr Swyddfa, am ei mewnbwn parhaus ac amhrisiadwy gyda'r holl brosesau ariannol, y gyflogres a swyddogaethau eraill. Diolch i'r holl staff am ddarparu gwasanaethau eiriolaeth rheng flaen ardderchog i'r rhai sydd eu hangen.

Unwaith eto, rhaid diolch i Mike Harris FCCA, o L M Griffiths & Co, am baratoi'r cyfrifon terfynol. Yn olaf, ond yn sicr nid lleiaf, diolch yn fawr i Natasha Fox am ei holl waith caled yn cynllunio, rheoli ac arwain y mudiad. Mae ei sgiliau paratoi ceisiadau wedi cyfrannu'n aruthrol at sefydlogrwydd ariannol AWW-EGC, gan roi cyflogaeth i lawer o bobl ac ystod ehangach o wasanaethau ar gyfer nifer cynyddol o ddefnyddwyr gwasanaethau.

Fel Trysorydd, rwy'n hyderus y bydd AWW-EGC yn parhau i fynd o nerth i nerth yn y blynnyddoedd i ddod.

Carolyn Oakley  
07.09.2022

## **Adroddiad y Prif Swyddog 2021-2022**

Bob blwyddyn, rwy'n dechrau'r adroddiad hwn gan nodi ein bod wedi cael blwyddyn yn llawn datblygiadau a'n bod yn edrych i gydgyfnerthu am gyfnod. Mae sialensiau a chyfleoedd newydd yn ein hwynebu bob blwyddyn.

Nid yw eleni, fy 8<sup>fed</sup> flwyddyn fel Prif Swyddog, wedi bod yn eithriad. Dyma'r flwyddyn anoddaf eto, ond y mwyaf gwerth chweil i'r mudiad ac i'n gwasanaethau.

Yn 2022, rydym bellach yn cyflogi tîm o 26 o bobl ymroddgar ar draws 8 prosiect.

Y tu hwnt i ddatblygiad pellach ein gwasanaethau eiriolaeth eleni, y datblygiad mwyaf fu ein Strwythur Sefydliadol; sefydlu Tîm Arwain ac ymestyn y ddarpariaeth yn yr Adran Graidd, gan ychwanegu Swyddog Cyllid (Temitope Adebayo) a datblygu rôl Peggy Spooner fel Rheolwr Datblygu Prosiectau.

### **Llwyddiannau wrth Sicrhau Cyllid:**

Bu modd i ni wneud cynnydd gwirioneddol o ran sicrhau cyllid ar gyfer gwasanaethau presennol a rhai newydd yn ystod y cyfnod adrodd hwn, gyda'r ceisiadau canlynol am gyllid gan sefydliadau / mudiadau sy'n cynnig grantiau a gwasanaethau statudol:

Eiriolaeth Broffesiynol Annibynnol y 3 Sir: Yn ystod y flwyddyn ariannol, bu modd i ni allu creu partneriaeth gref gydag Age Cymru Dyfed, Pobl yn Gyntaf Sir Gâr, Ymddiriedolaeth Gofalwyr Croesffyrdd Gorllewin Cymru a Dewis CIL, a gwnaed cais llwyddiannus, fel darparwr/cynigydd arweiniol, i Wasanaeth IPA y 3 Sir o dan y Deddf Gwasanaethau Cymdeithasol a Llesiant. Mae'r gwasanaeth hwn yn cynorthwyo pobl sy'n wynebu rhwystrau rhag lleisio eu barn, prosesau diogelu, cynllunio ac adolygu, a chwyno am y rhain. Dechreuodd y gwasanaeth ar 1.4.22, a bydd yn para am rhwng 4 a 7 mlynedd.

Eiriolaeth Iechyd Meddwl Annibynnol – y 3 Sir: Mae AWW wedi dal y cytundeb hwn gyda Bwrdd Iechyd Prifysgol Hywel Dda ers ei sefydlu yn 2008. Buom yn llwyddiannus wrth ail-dendro yn ystod y cyfnod adrodd hwn, a cychwynnodd y contract newydd, a fydd yn para am 3-5 mlynedd, ar 1.4.22.

Cyllid Parhad – Eiriolaeth Iechyd Meddwl Cymunedol Ceredigion: Mae'r hyn a ddechreuodd ym mis Rhagfyr 2020 fel prosiect peilot wedi'i ymestyn drwy'r cyfnod hwn a hyd at fis Mawrth 2023.

Henry Smith – Eiriolaeth Annibynnol ar gyfer Pobl ag Anabledd Dysgu a Phobl Awtistig yn Sir Benfro: Yn ystod y cyfnod hwn, gwnaethom gais am gyllid penodol ar gyfer prosiect 3 blynedd, i alluogi cyllid cynaliadwy ar gyfer ein gwasanaeth presennol ar gyfer PwLD ac AP yn Sir Benfro. Dyma'r tro cyntaf i'r gwasanaeth hwn gael cyllid penodol, ac mae'n cadarnhau ymddiriedaeth Pobl yn Gyntaf Sir Benfro i leoli'r gwasanaeth hwn gyda ni nôl ym mis Ionawr 2021.

Sefydliad Banc Lloyds: Fel mudiad, cawn ei hariannu gan Sefydliad Banc Lloyds, gyda grant i gefnogi ein hadran graidd ers 2019.

Gwnaethom gais llwyddiannus am flwyddyn olaf o gyllid yn ystod y cyfnod adrodd hwn, a bydd y grant yn para nes mis Ebrill 2023.

Mae'r cyllid hwn wedi bod yn hanfodol i'n galluogi i gynorthwyo ein rheolwyr a'n rolau di-eiriolaeth a chefnogi ein timau eiriolaeth.

Ymddiriedolaeth Hywel Davies: Roedd Hywel Davies yn gefnogwr AWW (MAP fel yr oedd) ers amser maith, a thrist iawn oedd clywed am ei farwolaeth. Buom yn ffodus iawn yn ystod y cyfnod hwn i gael

**Dyfyniad gan  
ddefnyddiwr  
gwasanaeth;**  
Diolch ...am fod yno i'm  
helpu i deimlo'n ddiogel  
ac wedi'i fy nghefnogi,  
amhrisiadwy

cymynrodd fechan o'i ystâd. Yn ddiweddarach yn y cyfnod adrodd hwn, cawsom ein gwahodd i wneud cais hefyd am gyllid o ystâd weddilliol Hywel, i gynorthwyo gyda gwasanaeth yn Sir Benfro. Gwnaethom gais am gyllid 3 blynedd ar gyfer Gwasanaeth Galw Heibio Eiriolaeth Iechyd Meddwl Sir Benfro, sy'n adlewyrchu'r gwasanaeth a ariennir gan Ymddiriedolaeth Tudor yn Sir Gaerfyrddin. Buom yn llwyddiannus wrth sicrhau'r cyllid hwnnw a dyfarniad ychwanegol, a fydd yn cynorthwyo ein Hadran Graidd dros y blynyddoedd nesaf. Mae ein diolch yn fawr i Ymddiriedolwyr y gronfa ac i Hywel.

Cyllid Gofal Integredig – Cronfa Arloesi Cymorth i Ofalwyr – Buom yn llwyddiannus wrth sicrhau dyfarniad bach i gynorthwyo gyda'n gwaith i ddatblygu Pecyn Cymorth Hunan-eirioli cynhwysfawr. Parhaodd y cyllid am rai misoedd dros y gaeaf yn y cyfnod adrodd hwn, ac mae gwaith yn parhau i gwblhau'r Pecyn Cymorth yn barod ar gyfer ymgynghoriad terfynol a'i gyhoeddi. Mae'r Pecyn Cymorth yn cynnwys cyfres gynhwysfawr o ddulliau ac ymarferion i dyfu hunan-eiriolaeth, boed yn unigol neu ar y cyd ag eiriolwr, ac yn y pen draw fe fydd fersiwn Cymraeg, Saesneg a Hawdd Ei Ddarllen ar gael i unrhyw un sydd ei angen.

Cyllid Gofal Integredig – Cronfa Arloesi Anableddau Dysgu – Llwyddwyd i sicrhau grant bach gan y gronfa hon i barhau i gynorthwyo ein gwasanaeth yn Sir Benfro, a threialwyd gwasanaeth newydd *My Wishes in Film*, sy'n cynnwys eiriolaeth a chreu ffilmiau gyda phobl sydd am greu ffordd newydd i roi gwybod i weithwyr proffesiynol am eu barn a'u dymuniadau. Fe wnaeth y cyllid alluogi'r peilot i redeg yn ystod 6 mis diwethaf y cyfnod adrodd hwn. Roedd yn ymarfer dysgu arwyddocaol, o ran faint o waith a sgiliau ychwanegol sydd eu hangen i gynhyrchu fideos ystyrion ar ran y bobl rydym yn eu cynorthwyo.

Buom yn llwyddiannus ym mhob cynnig am gyllid a gyflwynwyd yn ystod 2021-2022.

### **Datblygu Gwasanaeth:**

Diwrnod Hyfforddi'r Tîm Arwain ac Ailosod y Tîm: Gyda datblygiad Strwythur Sefydliadol newydd dros y 12 mis diwethaf, rhoddwyd darn sylweddol o hyfforddiant ar waith i'r Tîm Arwain, i gefnogi'r rheolwyr presennol a'r rhain newydd, a'n helpu ni i gyd i weithio gyda'n gilydd fel tîm. Mae wedi arwain hefyd at waith i ddatblygu Siarter Tîm AWW, gyda'r nod o'n helpu i gydgyfnerthu ein tîm a sicrhau ymagwedd Un Tîm.

Covid-19: Roedd effaith y pandemig yn parhau i gael ei theimlo ar draws AWW, gan y bobl rydym yn eu cynorthwyo ac yn fwy eang yn ein cymunedau. Rydym yn falch ein bod wedi gallu cynnal cymaint o'n gwasanaeth wyneb yn wyneb ag y gallem yn y cyfnod hwn, mewn ffordd ddiogel a rheoledig. Fe wnaethom gyfrannu at arolwg ac adroddiad ar draws y sector Cymreig yn y cyfnod hwn, yn dilyn yr adroddiad Gwerthfawrogi Lleisiau gwreiddiol, a oedd yn archwilio effaith barhaus Covid-19 ar y bobl rydym yn eu cynorthwyo, ein timau a'n gwasanaethau. Cynorthwywyd ein gwaith hybrid (cartref/swyddfa) parhaus gan ddatblygiad ein cronfa ddata rheoli achosion cleientiaid newydd, a aeth yn fyw ar 1.7.21, ar ôl cyfnod hir o ddatblygu.

Llesiant: Mae cymorth Llesiant ychwanegol i'n timau wedi'i roi ar waith gyda chymorth RCS, a ariennir gan Lywodraeth Cymru ar gyfer hyfforddiant, gweminarau, Cynlluniau Gweithredu Llesiant a Hyrwyddwyr Llesiant o'n tîm ein hunain.

**Cyrraedd ac Ymadael:** Yn gynnar yn y cyfnod adrodd hwn, croesawyd Temitope Adebayo fel Swyddog Cyllid, gan ddod â'n cymorth ariannol yn ôl yn fewnol. Mae cymorth Temi i'r Ymddiriedolwyr a minnau o ran y cyfrif rheoli a llywodraethu cyllid AWW, ac wrth baratoi cynigion am gyllid hefyd, wedi bod yn ddatblygiad i'w groesawu.

Croesawyd Abi Alexander, Rosie Culyer, Joanne Davies a Chloe Ellis i'r tîm yn ystod y cyfnod adrodd hwn. Fe wnaethom ffarwelio ag Ellie-Jay Thomas yr haf diwethaf, ac Ed Latter a Rachel Watt yng Ngheredigion yn fwy diweddar, a chroesawyd Helen Hillary.

Am gyfnod byr, fe wnaethom groesawu cydweithiwr newydd i Geredigion, i lenwi'r rôl Eiriolaeth Iechyd Meddwl Annibynnol yno. Roedd y person yn gweld y newid i rôl eiriolaeth yn amhosib, ond efallai bod ei sylwadau pan siaradodd â ni wrth ymadael ag AWW yn ein hatgoffa pwy ydym ni fel mudiad a'r hyn rydym yn ceisio'i gyflawni:

Soniodd am y croeso cynnes a'r gefnogaeth ardderchog a gafodd gyda ni yn AWW. Soniodd nad oedd erioed wedi gwerthfawrogi mor anodd y mae i elusennau fel ein un ni, y pwysau rydyn ni'n gweithio oddi tano a sut mae'n rhaid i ni weithio i gael bob tamaid bach o werth o'r cyllid wedi'i rewi a gawn i gynnal safon ein gwasanaethau. Soniodd am y ffordd rydyn ni'n mynd y filltir ychwanegol i'n cleientiaid, y set sgiliau unigryw y mae'n rhaid i eiriolwr annibynnol ei chael i gyflawni ei rôl yn ôl yr angen, a mor arbennig yw'r bobl sy'n meddu ar y set sgiliau honno. Soniodd ei fod wedi gwrandao ar gyfarfod o'r Bwrdd Iechyd yn ystod ei gyfnod sefydlu, a'i fod wedi'i syfrdanu gan yr atborth rhagorol am ein gwasanaethau a'r parch mawr sydd i ni fel unigolion ac fel tîm. Roedd yn cydnabod y sialensiau mewn lleoliadau lle mae ein rôl weithiau'n cael ei chroesawu ac mewn eraill lle mae gelyniaeth tuag ati, a sut rydyn ni'n cynnal ffocws ar y cleient a'n hagwedd gwbl broffesiynol. Soniodd y bydd, yn ei fywyd gwaith yn y dyfodol, yn sôn wrth ei gydweithwyr newydd mor hanfodol yw eiriolaeth i'r bobl maent yn eu cynorthwyo.

### **Cynllun Gwaith 2022-2023 ar gyfer AWW:**

Cydgfnerthu – Mae newid a thyfiant wedi parhau i ddigwydd yn AWW yn ystod yr ychydig flynyddoedd diwethaf. Mae wedi bod yn hollbwysig i gefnogi ein gwasanaethau, y bobl rydym yn eu cynorthwyo, ac i wneud y mudiad yn fwy cydnerth a chynaliadwy yn y tymor hir. Fodd bynnag, gyda'r newid a'r tyfiant hwnnw daw sialensiau newydd. Mae angen cyfnod o gydgfnerthu a chanolbwyntio ar hyfforddi arnom yn awr, i sicrhau ein bod yn gallu adeiladu ein tîm ehangach newydd fel un, a bod ansawdd ein gwaith yn parhau i gyrraedd y safonau uchel yr ydym yn eu disgwyl.

Ail-gomisiynu Gwasanaethau Eiriolaeth Iechyd Meddwl Cymunedol – Bydd y gwasanaethau hyn ar draws ardal Bwrdd Iechyd Prifysgol Hywel Dda yn cael eu hail-gomisiynu ymhén ychydig wythnosau, yn barod ar gyfer cyntact newydd a fydd yn dechrau ym mis Ebrill 2023. Mae hyn yn hanfodol i AWW, a byddwn yn gweithio'n galed i sicrhau'r contract newydd hwnnw drwy'r broses dendro.

Marc Perfformiad Ansawdd – Mae'r broses o'n hail-achredu â Marc Perfformiad Ansawdd safonol y diwydiant ar gyfer Gwasanaethau Eiriolaeth yn digwydd bob 3 blynedd, ac mae'n dod o gwmpas yn gyflym. Yn nes ymlaen eleni, fe fyddwn yn aildechrau'r broses o ail-achredu, yn barod ar gyfer dyfarniad newydd yn haf 2023.

### **Diolch a Chydnabyddiaethau:**

Mae'r mudiad yn ddiolchgar i Gymdeithas Gwasanaethau Gwirfoddol Sir Benfro am barhau i letya'n swyddfa yn Sir Benfro, i Brifysgol Cymru y Drindod Dewi Sant am letya'n swyddfa newydd yng Nghaerfyrddin yn Yr Atom, ac i Mike Harries o LM Griffiths am ei wasanaeth parhaus fel Archwilydd Annibynnol.

Mae ein Cadeirydd Andy Watters eisoes wedi diolch i'n harianwyr ac rwy'n ailadrodd hynny.

Diolch Roedd yn dda cwrdd â chi heddiw. Mae'n deimlad braf gwybod bod gennyf ryw faint o gymorth o safon i'm helpu i fynd i'r afael ag anawsterau gyda'm CMHT a'm Meddyg Teulu. Diolch eto.

Yn olaf, hoffwn ddiolch yn arbennig i'n tîm cyfan, allan ar reng flaen eiriolaeth a'r tîm cymorth yma yn Eiriolaeth Gorllewin Cymru, am eu hymroddiad a'u harbenigedd, a'r ysbryd tîm cryf y maent yn ei ddangos. Maent wedi dangos hyblygrwydd a chydnerthedd rhyfeddol yn ystod y cyfnod hwn. Edrychaf ymlaen at weithio gyda'r tîm cyfan y flwyddyn nesaf, a gweld y mudiad yn parhau i fynd o nerth i nerth er budd y rhai sy'n dibynnu ar ein gwasanaethau.

Fe wnaaf sôn yn fras am yr agweddau allweddol ar y gwasanaethau rwy'n gyfrifol am eu rheoli. Bydd Kate Bailey, AM, yn adrodd ar ein gwasanaethau cymunedol / anstatudol.

**Eiriolaeth Iechyd Meddwl Annibynnol (IMHA):** Unwaith eto, mae Covid-19 wedi effeithio ar y gwasanaeth yn ystod y cyfnod adrodd hwn. Mae'n gredyd i'r tîm eu bod wedi gallu parhau i ddiwallu anghenion eiriolaeth cleifion drwy'r cyfnod hwn.

Mae'r gwasanaeth hwn yn dal i gael atborth anhygoel o dda gan gleientiaid a chomisiynwyr / rhanddeiliaid eraill yn gyffelyb. Rhaid diolch i holl dîm ymroddedig AWW-EGC am ddarparu'r gwasanaeth hwn, parhau i eirioli barn cleientiaid yn gryf, a cheisio cynnal eu hawliau mewn amgylchedd cynyddol anodd ym maes iechyd a gwasanaethau cymdeithasol.

Rydym yn dal i weithio i wella'r ddarpariaeth drwy hyfforddi'n barhaus, hyfforddiant ymwybyddiaeth i atgyfeirwyr, a gwell ffyrdd o weithio.

Oedwyd y broses o ail-gomisiynu IMHA am gyfnod o 12 mis oherwydd Covid-19, gyda chyfnod treigl am amser tebyg. Arweiniodd her i ddyfarnu'r tendr at oedi pellach yn y canlyniad, ond o'r diwedd cawsom ein cadarnhau fel darparwr parhaus gwasanaethau IMHA yn ardal Bwrdd Iechyd Prifysgol Hywel Dda, a dechreuodd y contract newydd ar 1.4.22. Gyda'r cyllid yr un fath ag y bu ers sefydlu'r IMHA yn 2008, mae pwysau sylweddol ar y gyllideb i gyflawni canlyniadau a chynnal oriau eiriolaeth ac ansawdd y gwasanaeth.

Dyfyniad gan ddefnyddiwr gwasanaeth;

Rydych chi mor gefnogol i mi, nid ydych yn fy marnu, rydych chi'n fy helpu i ddeall beth sy'n digwydd ac mae angen hynny amaf, gan nad ydw i bob amser yn deall dogfennau ac adroddiadau, a beth sy'n digwydd.

**Eiriolaeth Broffesiynol Annibynnol y Tair Sir:** Rhoddwyd y gwasanaeth newydd hwn allan i dendr gan y tri awdurdod lleol ym mis Medi y llynedd.

Roedd AWW eisoes yn ddarparwr y gwasanaeth a gontractwyd yn unigol yng Ngheredigion, ac agwedd ar y gwasanaeth yn Sir Gaerfyrddin.

Symudwyd yn gyflym i sefydlu cydweithredu rhwng pob un o ddarparwyr presennol yr ardal - ni ein hunain, Age Cymru Dyfed, Pobl Yn Gyntaf Sir Gâr, Ymddiriedolaeth Gofalwyr Croesffyrdd Gorllewin Cymru a Dewis CIL – ac i dendro ar y cyd am y gwasanaeth tair sir, gydag AWW yn ddarparwr arweiniol ar y contract.

Buom yn llwyddiannus a dechreuodd y contract newydd ym mis Ebrill eleni, a bydd yn para am o leiaf 4 blynedd, ac uchafswm o 7 mlynedd.

Mae'r gwasanaeth yn cael atgyfeiriadau cyson ar draws ystod o anghenion a materion gofal a chymorth, ond mae llawer o waith i'w wneud i ddatblygu'r bartneriaeth, ein gallu a'n lefelau atgyfeirio, i sicrhau bod cymaint o bobl â phosib yn gallu cael mynediad at eiriolaeth o ansawdd uchel, mewn modd amserol.



Natasha Fox, Prif Swyddog, Medi 2022

## **ADRODDIAD CYMUNEDOL EBRILL 2021– MAWRTH 2022**

Mae wedi bod yn flwyddyn o barhau i lywio drwy'r pandemig, a dechrau dod allan ohono. Fel pob rhan o fywyd, roedd y pandemig yn dal i gael ei effaith yn ystod y cyfnod hwn.

Mae asesu risg ac adolygu canllawiau wedi bod yn allweddol i barhau i gadw ein holl ddefnyddwyr gwasanaethau a'n heiriolwyr yn ddiogel. Bu'n rhaid i ni ddysgu llawer wrth i ni fynd ymlaen yn 2020. Fodd bynnag, yn ystod y cyfnod hwn, cawsom gyfle i ddefnyddio'r hyn a weithiodd yn dda. Un agwedd ar hynny yw trefniadau gweithio cymysg. Mae hyn yn galluogi eiriolwyr i barhau i fod yn hyblyg o ran ble maent yn gwneud eu gwaith, y tu allan i ymweliadau a chyfarfodydd wyneb yn wyneb. Mae'n well gan rai eiriolwyr fod yn y swyddfa ac mae eraill yn gweithio gartref. Mae gan bob eiriolwr y dechnoleg a'r cymorth TG i wneud yr hyblygrwydd hwn yn bosib.

Rwy'n achub ar y cyfle hwn i roi diweddariad mwy penodol ar ein holl wasanaethau cymunedol:

### **Gwasanaeth Eiriolaeth Iechyd Meddwl Cymunedol - Sir Benfro**

Mae'r gwasanaeth hwn yn dal i fod yn eithriadol o brysur. Mae strwythur y cyfarfodydd dyrannu wythnosol, gweithwyr achos cleientiaid yn cynorthwyo gydag eiriolaeth lefel isel a chyfeirio / atgyfeirio, wedi bod yn hanfodol. Y rhan fwyaf o'r flwyddyn, bu modd i ni reoli anghenion defnyddwyr gwasanaethau y gwasanaeth hwn a chapasiti cyfyngedig o ran eiriolwyr gyda chymorth y Gweithwyr Achos Cleientiaid. Maent wedi bod yn wych yn cadw mewn cysylltiad â chleientiaid, os bu unrhyw oedi cyn bod eiriolwr 1:1 ar gael iddynt. Fodd bynnag, ym mis Rhagfyr 2021, am y tro cyntaf un yn AWW, daethom i'r pwynt lle nad oedd modd osgoi rhestr aros. Cafodd ei rheoli'n ofalus o fewn y gronfa ddata newydd a chysylltwyd â phawb a roddwyd arni. Bu modd i ni ddod â hi i ben yn gynnar ym mis Ionawr. Mae'r gwasanaeth wedi gweld rhai newidiadau i'r staff hefyd. Gadawodd Rebecca Arnold y tîm cymunedol i ddod yn IMHA Sir Benfro. Croesawyd Abi Alexander i'r tîm reit ar ddiwedd 2021.

### **Gwasanaeth Eiriolaeth Iechyd Meddwl Cymunedol - Sir Gaerfyrddin**

Fe wnaethom ganolbwyntio ar yr angen i hyrwyddo'r gwasanaeth a chynyddu cysylltiadau unwaith eto gyda'r Timau CMHT lleol, gyda'r nod o gynyddu atgyfeiriadau ganddynt. Wrth adolygu'r ystadegau trwy gydol y flwyddyn, rydym yn parhau i fod yn falch o'r cynnydd cadarnhaol mewn atgyfeiriadau. Ar ôl cyfnod eithaf anodd i'r gwasanaeth, bu'n flwyddyn dda o gydgyfnerthu. Roedd yn dda gennym groesawu Elaine Lewis yn ôl i'r gwasanaeth fel eiriolwr cymunedol llawn amser, ochr yn ochr â Clare Singleton. Mae hyn wedi golygu bod y gwasanaeth yn gyflawn nawr ers peth amser. Gwnaethom adolygu'r gwasanaeth, a chytunwyd mai canlyniad hyn fyddai helpu i symud ymlaen i feithrin ymagwedd 'un tîm' ar gyfer y gwasanaethau cymunedol. Cynhelir ein hadolygiad cyntaf o'r gwasanaeth cymunedol cyfan ar ddydd Mercher 14 Medi 2022.

### **Gwasanaeth Eiriolaeth Cymunedol Pob Oed Ceredigion**

Ers ei ddatblygu ym mis Rhagfyr 2020, mae'r gwasanaeth Pob Oed wedi mynd o nerth i nerth. Mae wedi meithrin perthynas waith dda ag ystod eang o wasanaethau, sy'n atgyfeirio'n gyson i'r gwasanaeth er

Dyfyniad gan  
ddefnyddiwr  
gwasanaeth;

Diolch. Byddai bywyd  
yn llawer llai o straen  
pe bai gan bobl y  
sgiliau gwrando  
rydych chi wedi'u  
dangos eleni.

enghraifft y CMHT, yr Awdurdod Lleol, a'r Brifysgol. Mae'r gwasanaeth yn gweithio'n gyson gyda 40 o gleientiaid y mis ar gyfartaledd.

### **Gwasanaeth Eiriolaeth Gofalwyr yn Sir Gaerfyrddin**

Mae'r gwasanaeth hwn wedi parhau i adeiladu'n raddol, a phan symudodd Elaine ymlaen fe wnaethom groesawu Natalie Sen ein cyn eiriolwr cyflenwi i swydd yr Eiriolwr Gofalwyr. Bu Natalie yn gweithio ochr yn ochr â Peggy, i hyrwyddo a rhwydweithio o fewn gwasanaethau gofalwyr yn y sir. Fodd bynnag, daeth i ben ar y ffurf hon ddiwedd mis Mawrth 2022, gan ei fod bellach wedi'i gynnwys o fewn Gwasanaeth Eiriolaeth Broffesiynol Annibynnol y 3 Sir (3CIPA).

### **Gwasanaeth i Bobl ag Anabledd Dysgu a Phobl Awtistig**

Mae'r gwasanaeth hwn wedi bod yn weddol brysur drwy gydol y flwyddyn, ac er y gall nifer yr atgyfeiriadau amrywio ar adegau mae anghenion y defnyddwyr gwasanaethau yn aml yn hynod gymhleth. Gwnaed llawer o waith trwy gydol y flwyddyn i nodi cyfleoedd ar gyfer cyllid i'r gwasanaeth hwn barhau a datblygu. Arweiniodd hyn at gyflwyno cais i Elusen Henry Smith ar ddechrau 2022. Mae'n bleser gen i ddweud bod y cais wedi bod yn llwyddiannus, ac mae gan y gwasanaeth bellach gyllid sicr nes 2025.

### **Gwasanaeth Galw Heibio Ymddiriedolaeth Tudor Sir Gaerfyrddin**

Ymunodd Amy Tynan ag AWW ym mis Gorffennaf 2021, yn ei rôl fel eiriolwr Galw Heibio Ymddiriedolaeth Tudor. Bu'n gweithio am gyfnod sefydlu fel eiriolwr, a hefyd bu'n gweithio'n agos gyda Peggy Spooner, ein Swyddog Datblygu Prosiectau bryd hynny, i rwydweithio â gwasanaethau lleol eraill a rhoi'r gwasanaeth ar waith. Mae'r gwasanaeth Galw Heibio yn parhau yng Nghaerfyrddin, Llanelli a Rhydaman. Mae'r eiriolwr Galw Heibio yn cronni ei llwyth achosion ei hun o'r rhai y mae'n eu cynorthwyo yn y sesiynau galw heibio. Rydym yn werthfawrogol iawn o'r berthynas waith barhaus sydd gennym gyda Links ac Adferiad.

### **Gwasanaeth Galw Heibio Ymddiriedolaeth Hywel Davies Sir Benfro**

Ar ddechrau 2022, gofynnodd Ymddiriedolaeth Hywel Davies i AWW gyflwyno cais am gyllid ar gyfer gwasanaeth newydd yn Sir Benfro. Yn seiliedig ar y gwerth a'r llwyddiant a welsom yng ngwasanaeth Galw Heibio Sir Gaerfyrddin, teimlwyd y byddai'n gyfle delfrydol i ddatblygu gwasanaeth tebyg yn Sir Benfro. Mae'n bleser gen i ddweud bod y cais hwn am gyllid 3 blynedd wedi bod yn llwyddiannus, a dechreuodd yr eiriolwr Galw Heibio newydd, Helen Hillary, ei swydd ar 1 Awst 2022.

Kate Bailey - Rheolwr Cynorthwyol

#### **Dyfyniad gan ddefnyddiwr gwasanaeth;**

Heb eich arweiniad proffesiynol, ni fyddwn yn ymwybodol o fy opsiynau. Dros y misoedd diwethaf, mae fy ngorbryder wedi gwaethgu llawer. Mae'r cymorth a ddarperir yn gwneud gwahaniaeth enfawr yn fy mywyd.

#### **Dyfyniad gan ddefnyddiwr gwasanaeth;**

Heb i chi fy nghyfeirio at ffynonellau gwybodaeth hanfodol ynghylch fy hawliau, mae'n debygol iawn y byddwn i'n absennol o'r gwaith â gorbryder ofnadwy. Mae AWW wedi bod yno i mi ar adeg pan oedd fy iechyd corfforol a meddyliol dan straen. Mae gen i fwy o ddealltwriaeth o fy hawliau bob tro y byddwch chi'n ffonio.

### Ymddiriedolwyr

Andy Watters, Cadeirydd

Carolyn Oakley, Trysorydd

Jane Kelso, Ymddiriedolwr

Andrew Armstrong, Ymddiriedolwr (*ymddiswyddo Mehefin 2021*)

Helen Butland, Ymddiriedolwr

Emlyn Sciafone, Is-gadeirydd

Dinah Davies, Ymddiriedolwr (*ymddiswyddo Gorff 21*)

Huw Michael, Ymddiriedolwr (*ymddiswyddo Awst 21*)

David Jones, Ymddiriedolwr (*ymddiswyddo Awst 21*)

~~~~~

Tîm Staff

Natasha Fox, Prif Swyddog

Kate Bailey, Dirprwy Reolwr

Sue Blantern, Rheolwr Swyddfa/Gweinyddwr

Andrea Potter, Arolygydd/IMHA, Sir Gaerfyrddin

Nia Williams, Arolygydd/IMHA, Sir Gaerfyrddin

Sarah Thomas, IMHA, Sir Gaerfyrddin

Sue Williams, CCW/Eiriolwr

Ed Latter, Arolygydd Ceredigion (*ymddiswyddo Mehefin 22*)

Ian Rees, IMHA, Sir Gaerfyrddin

Rebecca Arnold, Eiriolwr Cymunedol/IMHA, Sir Benfro

Jayne Edwards, Swyddog Gwybodaeth

Clare Singleton, Eiriolwr Cymunedol,
Sir Gaerfyrddin

Peggy Spooner, Gweithiwr Achos Cleientiaid/
Gweithiwr Datblygu Prosiectau

Elaine Lewis, Eiriolwr Cymunedol,
Sir Gaerfyrddin

Ellie-Jay Thomas, Eiriolwr (*ymddiswyddo Awst 21*)

Pete Irvine, Eiriolwr LD & AP

Kate Roberts, Eiriolwr Cymunedol,

Sir Benfro

Shelly Newton, Eiriolwr LD & AP

Kate Isherwood, Eiriolwr LD (*Ion-Mai 21*)

Rachel Watt, IMHA/CIPA (*ymddiswyddo Mehefin 22*)

Ceridwen Kabir, Eiriolwr Cymunedol, Ceredigion
(*o fis Ion 21*)

Temitope Adebayo, Swyddog Cyllid (*o fis Mawrth 21*)

Amy Tynan, Eiriolwr Cymunedol,

Sir Gaerfyrddin (*o fis Gorffennaf 21*)

Natalie Sen, IMHA/Eiriolwr Cymunedol, Sir
Gaerfyrddin (*o fis Gorffennaf 21*)

Abi Alexander, Eiriolwr Annibynnol (*o fis Rhagfyr 2021*)

Rosie Culyer, Eiriolwr Annibynnol (*o fis Mawrth 2022*)

Joanne Davies, CCW (*o fis Mawrth 2022*)

Chloe Ellis, CCW (*o fis Ebrill 2022*)

Helen Hillary, Eiriolwr (*o fis Awst 2022*)



Gyda diolch i'n Harianwyr





Advocacy West Wales
Eiriolaeth Gorllewin Cymru

A voice when you need it most
Llais pan fydd ei angen arnoch fwyaf

Accounts

Advocacy West Wales — Eiriolaeth Gorllewin Cymru



ANNUAL REPORT 2020 - 2021

Registered Office
Advocacy West Wales—Eiriolaeth
Gorllewin Cymru
36/38 High Street
Haverfordwest
SA61 2DA

Tel/Fax: 01437 762935
Registered Charity No: 1172200

Chair's Report 2020-2021

For the second year COVID has been a major challenge, although thankfully, the risk management measures put in place across the organisation have continued to limit the disruption to our clients. Our amazing team have continued to provide a service including face to face working and, as you will hear, the numbers of referrals and levels of activity are at pre-COVID levels or above. I cannot stress enough the commitment and good will shown by all team members throughout this episode. This has been recognised by our Commissioners in their quarterly reviews.

In recognition of their efforts we have obtained a grant from The Tudor Trust to fund several healthy, recreational days out to enhance the “well-being” of the whole team.

Since the merger in March 2020, Advocacy West Wales-Eiriolaeth Gorllewin Cymru (AWW-EGC) has nearly doubled in size, from 13 to 22 members of staff.

We have appointed a Finance Officer, Temitope Adebayo to assist the Chief Officer in preparing the management accounts, preparation and monitoring of the budget and preparing reports for funders and Commissioners. Some of this work was previously outsourced, and I must thank Denise Davies of SMART Bookkeeping for her diligence over the years.



Three Supervisors have been appointed from the team, Andrea Potter, Ed Latter and Nia Williams, to provide professional/clinical support and supervision in each of the three counties. Kate Bailey continues as Assistant Manager, supporting the Chief Officer in team and community service development whilst holding a small advocacy caseload.

As reported by Mike Harries, our Independent Examiner, we continue to be a financially well run and sustainable organisation. For this I must credit the effective team of Mike, our Treasurer Carolyn Oakley and Finance Officer Temitope.

As well as receiving grants from The Lloyds Bank Foundation, I must also thank The Tudor Trust for their funding of the Carmarthenshire “Drop-In” Service, Hywel Dda for funding the pilot Ceredigion “All Ages” Community Advocacy Service, and Pembrokeshire People First and Pembrokeshire County Council for their funding support to the Pembrokeshire Advocacy Service for People with a Learning Disability and Autistic People

As a result of changes in work practices, such as adopting a mix of office working and working from home, we have moved to a smaller, but more modern and comfortable office in Carmarthen at Yr Atom, also in King Street. This will be easily accessible to meet clients in a comfortable, relaxed environment. It will also enable informal “networking” with other community organisations. Thanks to Sue Blanter, the Office Manager, and Peggy Spooner, Project Worker, for this smooth and well organised operation earlier this month.

Looking forward, we are hopeful that we are successful in the recent tender for the Independent Mental Health Advocacy (IMHA) contract with Hywel Dda University Health Board.

Over the last six months there have been major changes to the Board of Trustees, with resignations from Dinah Davies our Vice Chair and former Chair of Eiriol, David Jones and Huw Michael, both former Trustees of Eiriol. I would like to thank them for their commitment and hard work during the merger process and subsequent integration of the two organisations.

I must also pay tribute to Andrew Armstrong, our longest serving Trustee of 14 years, who has retired to Wiltshire. We thank Andrew for his valuable contributions over the years and wish he and his wife a happy retirement in a county with some excellent breweries.

Thanks also to my fellow Trustees, Helen Buckland, Jane Kelso, Carolyn Oakley and Emlyn Schiavone, whose support and advice I value highly.

We will of course welcome enquiries from anyone with an interest in mental health willing to contribute their time as a Trustee of the organisation.



Andrew Watters
Chairperson, AWW-EGC

TREASURER'S REPORT FOR THE YEAR ENDING 31 MARCH 2021

The year ending 31 March 2021 marked the end of the first year of the merged organisation. (The merger between Eriol and AWW took place at the end of February 2020.) Obviously the pandemic created many problems and uncertainties for the new AWW-EGC and the successful integration, and indeed survival, of the organisation reflects the strength and good management of the staff and the generosity of our funders.

Total income for the year was £656,001 (AWW £390,505 in 2020). Total expenditure was £516,275 (AWW £382,971 in 2020) giving a surplus for the year of £139,726 (AWW surplus £7,534 in 2020). Total funds carried forward were £315,315 (AWW £139,197 in 2020). The surplus of restricted funds in part relates to early receipt of funds which will cover the cost of projects going into 2021-22.

AWW-EGC is financially very sound and is held in high regard by the Health Board and other funders. They are confident that their funds will be put to very good use by providing excellent advocacy services across the three counties of Pembrokeshire, Carmarthenshire and Ceredigion. We would like to thank everyone who has provided funding. Lloyds Foundation for core costs which continue to fund the Information Officer and Project Development worker. Funds from Tudor Trust continue to fund service development work in Carmarthenshire.

In April of this year AWW-EGC appointed Temitope Adebayo as Finance Officer. The size and complexity of the organisation made it necessary to move this role in house as there are now many different departments which all need to be monitored both individually and collectively. We thank Denise at Smart Bookkeeping for her work over the years and now welcome Temitope in her new role. She will provide regular management accounts for the Trustees and Chief Officer, Natasha Fox. This will ensure ongoing up to date financial information is available. We also thank Sue Blantern, Office Manager, for her input with bookkeeping and payroll. Thank you to all the staff for delivering excellent front line advocacy services to those who need it.

Again, we must thank Mike Harris FCCA, of L M Griffiths and Co, for producing the final accounts. Last, but certainly not least, a big thank you to Natasha for all her very hard work, planning, managing and leading the organisation. Her bid writing skills have contributed hugely to the financial stability of AWW-EGC, providing employment for many people and an ever-growing number of service users.

As Treasurer, I am confident that AWW-EGC will continue to go from strength to strength over the coming years.

Carolyn Oakley, Treasurer AWW-EGC

CHIEF OFFICER'S REPORT APRIL 2020 - MARCH 2021

It has been another year full of developments here at AWW-EGC. I hope that you will enjoy reading about some of the achievements and challenges.

The organisation has developed over the last 18 months such that our employee team has doubled and we have 8 services currently being provided across the West Wales area. This makes us the largest provider of both statutory and non-statutory Independent Advocacy services in the region.

The organisation has seen further development this year with three new services:

The Tudor Trust funded advocacy service in Carmarthenshire, involving the establishment of drop-in advocacy services in Llanelli and Ammanford (2020-2023), the new Ceredigion All Ages Community Mental Health Advocacy Service (2020-2021), the Independent Advocacy Service for People with a Learning Disability and Autistic People in Pembrokeshire (2021).

Covid-19 Pandemic: The impact of the pandemic has continued to be felt across Wales, within AWW-EGC and, most importantly by the people we support.

After an initial period of remote working, the organisation worked to make a return to face to face working. This required extensive risk assessment and guidance, provision of PPE, protocols in settings, training, and more recently vaccination for our team and Lateral Flow Testing arrangements. We were one of the first third sector organisations to make a return to face to face working and to ensure that this remains our default position.

We were able to be involved in a sector wide response in the creation of an England and Wales wide Advocacy Leaders' Network. That network has pulled together in the biggest pieces of collaborative work across the sector, to provide much needed guidance during the pandemic, support for leaders, the compiling of surveys around the impact of the pandemic and changes among services for the people we support, and a report Valuing Voices: Protecting Rights Through the Pandemic and Beyond.

During this period our Team was supported to be based from home with all the challenges and some advantages that this brings. It has led to significant investment into our IT systems including a new client case management database. Thank you to Chris Hill and his team at Blue Door and to the AWW-EGC working party for their work in developing, testing and rolling out this new platform.

Feedback from clients and across the sector has been that technology is another tool in the toolkit of advocacy and in no way replaces the value of one to one in person advocacy – having your advocate alongside you in the room. We continue to work with clients who are denied in person hearings and significant meetings and who feel disadvantaged as a result. Our role is to advocate both individually and systemically to ensure that these do not become new norms and remain temporary adjustments for health protection reasons.

Quote from a service user;

'back then we were his only real care and support and thank you.'

Recovery, as a team, an organisation and for our work with clients, will continue well into next year. This

has been very resource intensive but we were fortunate to secure a Coronavirus Recovery Grant from the Community Foundation Wales (assisted by existing funder Lloyds Bank Foundation) which will go some way to recovering some of the costs of team time, technology investment and protective equipment required during this period.

We are also grateful to have received a Wellbeing Grant to support our employee team from Tudor Trust. The first Wellbeing day took place on 29 June and involved a lovely team walk in Ffynnone Woods followed by a picnic at Castell Newydd Emlyn in the grounds of the castle. The team will also benefit from a Team Beach Day and an activity day as part of our work to bring the team back together after COVID. More recently we have seen the development of workplace Wellbeing Champion Roles.

During this period we began working towards our Silver Investors in Carers Award.

Training and Development Focus: for AWW-EGC and the wider sector: 2020-2021 saw us lead a sector wide skills and knowledge development training series, some provided in-house with the more technical rights based training being provided by leading lawyers in the field of Mental Health and Mental Capacity Legislation and Social Care Law. Several advocates enrolled on the new Level 4 Independent Advocacy Qualification which we were involved in the development of, with other providers, Qualifications Wales, Social Care Wales and City and Guilds.

Post-Merger Review and Development – November 2020: The merger between AWW and Eiriol took place in March just weeks before the first COVID lockdown. The team and Trustees came together in November 2020 to undertake a review of the merger, its outcomes and future development of the organisation. Thanks must go to Angie Darlington of West Wales Action for Mental Health who facilitated that meeting. Further work to develop the Trustee Board will take place now that we are able to come together in person and October will see a Planning and Development Opportunities Meeting for the organisation.

As part of the development work since the merger we have strengthened our management structure with the development of the Assistant Manager role (Kate Bailey), the creation of three new supervisor roles drawn from our experienced advocacy team (Andrea Potter, Nia Williams and Ed Latter), a project development officer role (Peggy Spooner), as well as an additional client caseworker role (Sue Williams). More recently we have welcomed Temitope Adebayo to the role of Finance Officer and taken our finance provision back in house.

These roles, some of which have been partially supported by recent core cost grant funding, including from Lloyds Bank Foundation, have significantly enhanced management, development and support within the organisation, reducing workloads on managers whilst balancing that with our commitment to the provision of the maximum possible frontline advocacy services.

Arrivals and Departures: We welcomed a number of new team members during this period.

Kate Isherwood and Shelly Newton transferred from Pembrokeshire People First in January 2021 to provide the Independent Advocacy Service for People with a Learning Disability and Autistic People. Kate retired in May 2021 and we wish her well in her retirement and thank her for her valuable contribution in her short time with us. That service is now supported by Shelly Newton and Pete Irvine. The transfer of this service to AWW sees the effective amalgamation of the longest established local independent advocacy providers into one organisation AWW-EGC.

With our successful bid for a Community Mental Health Advocacy Service in Ceredigion, we welcomed Ceridwen Kabir to the team in January 2021. This service is available to people across the full age range including children and young people.

We said goodbye to Ceredigion advocate Jo Creasey and her role was taken up by Rachel Watt in Ceredigion in January 2021.

More recently we welcomed Temitope Adebayo to the role of Finance Officer, Amy Tynan to the Tudor Trust Drop-in Advocacy role and Natalie Sen to a cover role across Carmarthenshire and Pembrokeshire.

Welsh Language Development: A number of our colleagues are engaged in Welsh language training to enhance the level of available Welsh language provision already provided by our Welsh speaking colleagues. Additional support has been in place in the form of a Welsh Speakers' Lunch Club.

Further achievements this year have been: AWW-EGC continues to be a very active member of the Three County Advocacy Strategy Network. As Chief Officer I chaired the Network for over 3 full years during some of the most exciting and intensive times. This now involves attendance at the All Wales Chairs' Network. The networks have been crucial in providing mutual support and development over this last year. I stepped down as Chair of the regional network in the Spring of 2021 but continue to contribute to the National Chairs' Network.

It comes around every 3 years – the latter part of this reporting period saw us preparing for the reaccreditation of our Quality Performance Mark. We were awarded the QPM with an exemplary report. The report can be found on our website for those who are interested in reading more about how we ensure the highest quality of advocacy provision.

Developments in Partnership Working: The Resilience Hub (TRH) – the collaborative work undertaken in the Network and the perceived value of TRH has led to 2 new applications to join the Hub. We are working with both organisations to build independence, resilience, quality and professionalism in their advocacy services.

I will briefly detail the key aspects of services for which I have management responsibility. The Community Mental Health Advocacy Service in both Pembrokeshire and Carmarthenshire, the Carers' service in Carmarthenshire and the Service for People with a Learning Disability and Autistic People will be reported on by Kate Bailey. Pete Irvine will report on the Integrated Care Funding Development Advocate Role. Ed Latter will report on the new All Ages project in Ceredigion.

Independent Mental Health Advocacy (IMHA): The service has been impacted by Covid-19 during the whole of this reporting period. Initially the reduced admissions and restrictions to accessing wards resulted in a substantial reduction in referrals into the service. However with the return to face to face working in June 2020 service has recovered to pre-Covid levels.

This service continues to receive incredibly good feedback from clients and commissioners/other stakeholders alike. Thanks must go to the dedicated team across AWW-EGC in providing this service and continuing to strongly advocate client views and seek to uphold their



We worked with almost 700 people in our IMHA service last year .

rights and entitlements in an increasingly difficult environment in health and social services.

We continue to work to improve delivery with ongoing training, awareness training to referrers, better ways of working. Covid-19 saw the recommissioning of IMHA delayed for a 12 month period with a rollover for a like period. We await the outcome of the recent tender process at the point of going to print. With this and the regional IPA services also expected to go out to tender in late 2021 there will be no let up on our drive to ensure quality advocacy services in West Wales.

Ceredigion Independent Professional Advocacy: The project was commissioned from October 2019 as a partnership between AWW, Eiriol and PPF. Following the merger between AWW and Eiriol the partnership continued with PPF until they withdrew from independent advocacy work to focus on their core work. We sought a new partner in Age Cymru Dyfed who came on board to deliver the CIPA service with us from January 2021. Funding for this service has been extended to end March 2022.

The service continues to see regular referrals across a range of care and support needs and issues. Implementing new services in an area previously almost devoid of advocacy has been challenging, particularly so during a pandemic, but the service has been essential in this time to enable people to access services, safeguard individuals and protect rights.

At the time of writing this report it is understood that there is a commitment from local authority commissioners in the three counties to a regional commissioning process for advocacy under the Social Services and Wellbeing Act with a proposal to go out to tender this autumn with a contract start date of April 2022. We will be approaching the tender on a partnership basis.

Quote from service user;

'You are the only one who has constantly been there for me and I don't think that I would still have been here if it hadn't been for you and all your support. Thank you so much and I really do mean it.'

Thanks and Acknowledgments: The organisation is grateful to Pembrokeshire Association of Voluntary Services for continuing to host our Haverfordwest office and to Smart Bookkeeping and Mike Harries of LM Griffiths for assisting our Treasurer Carolyn Oakley and I in robustly maintaining our financial management arrangements.

Thanks go to our funders including Hywel Dda University Health Board, Ceredigion and Carmarthenshire County Councils, the Lloyds Foundation, the Tudor Trust, the Community Foundation Wales, Enhancing Pembrokeshire (Pembrokeshire County Council), and West Wales Care Partnership (Integrated Care Funding).

Finally, I would like to give special thanks to our entire team here at Advocacy West Wales-Eiriolaeth Gorllewin Cymru for their dedication and expertise, and the strong team spirit that they display. They have shown remarkable adaptability and resilience during this period. I look forward to working with the whole team over the next year and to see the organisation continue to go from strength to strength for the benefit of those who so need and rely upon our services.



With the very best of wishes to everyone involved with AWW-EGC.

COMMUNITY REPORT APRIL 2020 - MARCH 2021

Everyone will be aware that one of the greatest impacts on the community service and our world over this period has been the COVID-19 pandemic.

For a short period of time in April and May 2020 at the initial lockdown, referrals into the community service decreased slightly. From June 2020 referral levels increased and continue to do so.

During the early stages of the first lockdown service was provided remotely. Following planning and risk assessment we gradually reintroduced face to face working in June 2020 for essential work that could not be carried out remotely. Through ongoing process of risk assessment we quickly returned to a default position of face to face visiting for all our clients. It was clear to us that the people we support were keen for services to be face to face, although a much wider use of technology continues so that there can be a blended approach of greater choice for those we support.

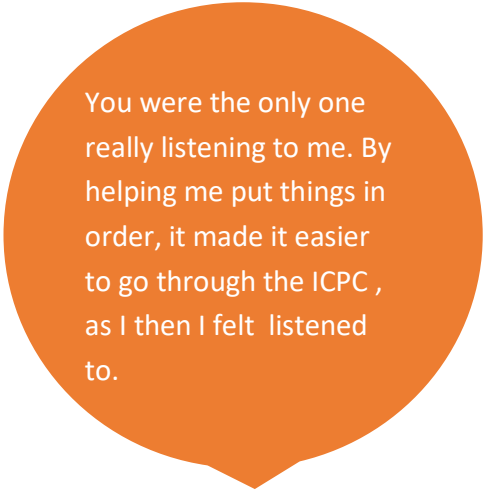
Our community service has also gone through extensive change following our merger with Eiriol in March 2020. From 1st January 2021 the independent advocacy service for people with a learning disability and autistic people transferred to AWW-EGC from Pembrokeshire People First with 2 advocates joining the team here. As a result, it has been an incredibly challenging time but also a very exciting season. It has been brilliant to see all our community services embrace the challenges they have faced and come out stronger. I would like to take this opportunity to thank all the advocates within the team as it has been down to their commitment, determination and professionalism that we are able to provide the services we do.

I will take this opportunity to provide a more specific update for all our community services:

The Community Mental Health Advocacy Service Pembrokeshire

Apart from a short drop in referrals at the beginning of this reporting period the service has been consistently running at or very near to capacity. This is a very busy service with increasing demand. Post-merger we continued to review both community services within Pembrokeshire and Carmarthenshire. Within Pembrokeshire this led to the very welcome development of a client case worker role. We were very happy to have Sue Williams join our team in this role from September 2020. Kate Bailey stepped back from most of her direct advocacy role, to take a lead on community team development and management, and we welcomed Kate Roberts to the team in November 2020 to join Rebecca Arnold in the community.

There have been several developments following the introduction of our client case worker and this has supported an increase in the capacity of the service. Now processing new referrals and all initial contact is carried out by the client case worker. Weekly allocation meetings were introduced to support the service. Low level advocacy and signposting /referring can be carried out by the client case worker. Currently she will also keep in touch with clients if there is any delay in a 1:1 advocate being available to them. We will continue to work with the team and our clients to try and avoid the need for a formal



You were the only one really listening to me. By helping me put things in order, it made it easier to go through the ICPC , as I then I felt listened to.

waiting list at this point.

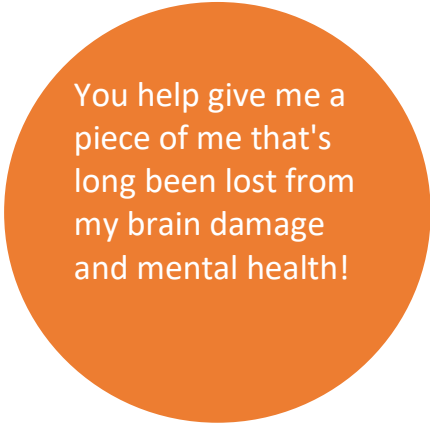
The Community Mental Health Advocacy Service Carmarthenshire,

This has been a very long standing and well-established service within Carmarthenshire. We have worked with the team to build on this over the year. Initially it was a steep learning curve for all the advocates that came across to AWW-EGC as they had a lot of new computer systems and a database to learn how to use. It was essential to have these systems in place especially as the pandemic very quickly impacted on the service. Only a couple of weeks into the merger and the whole team at AWW-EGC was based at home due to the pandemic. I would say for everyone in the organisation it has been a challenging year but for the team who joined us right at the beginning of this it was very difficult in the early days.

As the months went on we developed new ways of working and continued to meet online to review the community service. We then focused on promoting the advocacy service within the local Community Mental Health Teams (CMHT). We needed to promote the service and increase referrals but felt this was especially true to re-establish our relationship with the local CMHT in an aim to increase referrals from them. I am pleased to report we achieved the desired affect and the service has seen an increase in referrals for people within the local CMHT. In recent months there have been considerable cover challenges with one advocate off long term. I would like to sincerely thank Claire Singleton, Peggy Spooner, Andrea Potter and the wider team for their dedication and hard work in keeping this service running.

Carers' Advocacy Service in Carmarthenshire

One of the initial tasks we undertook post-merger was to review the Carers' Advocacy Service. Initially all three advocates provided both Carers and Community Mental Health Advocacy. However, whilst reviewing the Carers' Service we saw the rate of referrals were very low. We have made significant changes to address this. Our part time advocate Elaine Lewis took on the challenge to be AWW-EGC Carers' Advocate. She has worked closely with Peggy Spooner our Project Development Officer to redevelop the service and promote this within the local community. Their hard work has really paid off and we now have a clear identifiable service with increasing referrals. My thanks goes out to them both for all the hard work they have put in to achieve this.



You help give me a piece of me that's long been lost from my brain damage and mental health!

Service for People with a Learning Disability and Autistic People

The service came across to AWW-EGC in January 2021. This has been an exciting development to establish advocacy for people with learning disabilities and autistic people within a specific advocacy organisation. We have a centralised first point of contact so Sue Williams our client case worker receives all referrals and makes initial contact. This has helped all referring agencies to be able to utilise the same referral process for all our advocacy services in Pembrokeshire. We continue to keep this service under review and look to work with our Project Development Officer to explore further funding opportunities to enable us to increase capacity of the service and the sustainability of its funding.

Across all community services we have seen an increase in the number and complexity of safeguarding

referrals this year, particularly for parents with children in safeguarding processes. Anecdotally, this appears to correlate to the COVID-19 pandemic and the impact of this on support services and individual families.

Kate Bailey

Assistant Manager AWW-EGC.



We worked with
over 1100 people
in our Community
Service last year

Ceredigion All Ages Service December 2020 – Present

2020 saw a major improvement for community Advocacy in west Wales with the establishment of a fully funded service for Ceredigion. This resulted in service users in that county being able to access Advocacy on an equitable level with service users in Carmarthenshire and Pembrokeshire. This service has been provided by Edward Latter and Ceridwen Kabir, who we are delighted to welcome to AWW-EGC.

Our predominant focus has been to raise awareness of the service amongst service users, the Community Mental Health Team, the Local Authority and other third sector organisations. This has been broadly successful and is evidenced in the number of referrals we have received. Huge thanks must go to Peggy Spooner for helping organise remote awareness raising sessions.

A unique feature of this service is that is accessible to all ages, meaning working with young people under the age of eighteen. This has been a fascinating insight into how mental health difficulties can manifest differently in children, and also a challenge from an Advocacy point of view in ensuring young people's voices are heard as opposed to that of concerned parents. Ceridwen comes with a wealth of experience working with children in London and has a creative and unique approach which has proved extremely successful in that regard. This includes working closely with Jayne and Sue to develop online means of accessing Advocacy for younger people who use the digital communications as their first port of call. The aim for the next twelve months is to continue to grow the service, hopefully leading to more secure funding for it in the future.

Covid 19 Pandemic – As with all services we have continued to offer one to one Advocacy where appropriate following Welsh Government guidelines where required. It has been a core concern of service users that other services follow suit, and much Advocacy has been based around asking the services to engage with their users face to face.

Ed Latter, Professional Lead, Ceredigion.

ICF Advocacy Development Dec 2019—March 2021

This post was hosted within AWW throughout this AGM report period. It's focus was on developing quality and resilience across the advocacy sector in West Wales and in particular leading in the drafting of an Advocacy Strategy in line with the commissioning requirements of both the regional Local Authorities and the Health Board.

As most of the aims of the Project had been met by December 2020, the hours on the Project transitionally reduced through till the end of the Project in April 2021. A draft strategy had been produced and sent to the West Wales Care Partnership for their ratification prior to going out to wider consultation.

With the support of Natasha, a training programme was also arranged and delivered for advocates both regionally and nationally.

I would like to thank Natasha and the whole team at AWW for their generous support through what was for everyone a very challenging time.

Pete Irvine, former Advocacy Development Worker.



Trustees

Andy Watters, Chair

Carolyn Oakley, Treasurer

Jane Kelso, Trustee

Andrew Armstrong, Trustee

Helen Butland , Trustee

Dinah Davies, Trustee (*resigned July 21*)

Huw Michael, Trustee (*resigned August 21*)

David Jones, Trustee (*resigned August 21*)

Emlyn Sciavone, Trustee

~~~~~

### **Staff Team**

Natasha Fox, Chief Officer

Kate Bailey, Deputy Manager

Sue Blanter, Office Manager/Administrator

Andrea Potter IMHA Carmarthenshire

Nia Williams, IMHA, Carmarthenshire

Sarah Thomas, IMHA, Carmarthenshire

Sue Williams, IMHA, Carmarthenshire

Ed Latter, IMHA Pembrokeshire

Ian Rees, IMHA Carmarthenshire

Rebecca Arnold, Community Advocate/IMHA Pembrokeshire

Jayne Edwards, Information Officer

Jo Creasey IMHA/CIPA (*resigned December 20*)

Clare Singleton, Community Advocate, Carmarthenshire

Peggy Spooner, Client Caseworker/Project Development worker

Elaine Lewis, Carers Advocate /IMHA

Ellie-Jay Thomas, Advocate (*resigned August 21*)

Pete Irvine, LD Community Advocate

Kate Roberts, Community Advocate, Pembrokeshire (*from November 2020*)

Shelly Newton, LD Community Advocate

Kate Isherwood, LD advocate (*Jan-May 21*)

Rachel Watt , IMHA/CIPA (*from Jan 21*)

Ceridwen Kabir, Community Advocate Ceredigion (*from Jan 21*)

Temitope Adebayo, Finance Officer (*from March 21*)

Amy Tynan, Community Advocate, Carmarthenshire (*from July 21*)

Natalie Sen, IMHA/Community Carmarthenshire (*from July 21*)



**Advocacy West Wales**  
**Eiriolaeth Gorllewin Cymru**

*A voice when you need it most*  
*Llais pan fydd ei angen arnoch fwyaf*



**GIG**  
CYMRU  
**NHS**  
WALES

Bwrdd Iechyd Prifysgol  
Hywel Dda  
University Health Board



Llywodraeth Cymru  
Welsh Government



CYNGOR SIR  
**CEREDIGION**  
COUNTY COUNCIL



**LLOYDS BANK**  
**FOUNDATION**  
England & Wales



**Community**  
**Foundation**  
**Wales**

the  
**Tudortrust**



**wwcp**

Partneriaeth Gofal Gorllewin Cymru  
West Wales Care Partnership

**CHARITY REGISTRATION NUMBER: 1172200**

**REPORTS AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MARCH 2021  
FOR  
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited  
Chartered Certified Accountants  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**FINANCIAL STATEMENTS**  
**for the year ended 31 March 2021**

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**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2021**

**Structure, Governance and Management**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

**History**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

**Objectives and activities for the public benefit**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) providing advocacy services for adults experiencing mental health issues, for older people with mental health issues and/or dementia, for adults with a learning disability or autism, and for children and young people with mental health issues.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2021**

**Achievements and Performance**

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- adults including older people in Pembrokeshire and in Carmarthenshire including Carers (since 1/3/20)
  - IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
  - Independent Professional Advocacy in Ceredigion
  - ICF Development Advocacy (to 31.3.21) funded by WWCP to support regional commissioning of Independent Professional Advocacy
  - All ages Community Mental Health, Ceredigion from December 2020
  - Adults with a learning disability or autism, Pembrokeshire (following a transfer from PPF 1/1/2021)
- AWW-EGC merged with Eiriol Mental Health Advocacy from 1/3/20

**Financial Review**

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Hywel Dda University Health Board, NHS Wales, Ceredigion County Council, Lloyds Bank Foundation, Carmarthenshire County Council, Tudor Trust, Enhancing Pembrokeshire.

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £656,001.

**Reserves Policy**

The current policy is to hold reserves equivalent to:

3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £75,628 and restricted reserves amounted to £203,295

**Future Developments**

AWW-EGC propose to tender with other providers in the region when the Independent Professional Advocacy tender across the 3 counties of Pembrokeshire, Carmarthenshire and Ceredigion is published in the autumn of 2021.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2021**

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

.....  
A Watters, Chairperson

Date: .....

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2021**

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2021.

**REFERENCE & ADMINISTRATIVE DETAILS**

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

|                  |                                |
|------------------|--------------------------------|
| Andy Watters     | Chair                          |
| Isabel Stevenson | Vice Chair (resigned 20/08/20) |
| Carolyn Oakley   | Treasurer                      |
| Barbara Wilson   | (resigned 01/04/20)            |
| Jane Kelso       |                                |
| Andrew Armstrong | (resigned 19/05/21)            |
| Helen Butland    |                                |
| Dinah Davies     | (resigned 01/07/21)            |
| Huw Michael      | (resigned 01/08/21)            |
| David Jones      | (resigned 01/08/21)            |
| Emlyn Sciafone   |                                |

Accountants L M Griffiths & Co Ltd  
Chartered Certified Accountants  
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers CAF Bank Ltd  
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**INDEPENDENT EXAMINER'S REPORT**  
**31 March 2021**

**Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru**

I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (the Trust) for the year ended 31 March 2021.

**Responsibilities and basis of report**

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

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

**Independent examiner's statement**

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body, I can confirm that I am qualified to undertake the examination because I am a registered member of ACCA which is one of the listed bodies.

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

Michael Harries FCCA  
L M Griffiths & Co Ltd  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**STATEMENT OF FINANCIAL ACTIVITIES**  
for the year ended 31 March 2021

|                                                       | Notes | Unrestricted<br>funds | Designated<br>&<br>Restricted<br>funds | Total<br>funds<br>2021 | Total<br>funds<br>2020 |
|-------------------------------------------------------|-------|-----------------------|----------------------------------------|------------------------|------------------------|
|                                                       |       | £                     | £                                      | £                      | £                      |
| <b>INCOMING RESOURCES</b>                             |       |                       |                                        |                        |                        |
| <b>Incoming resources from generated funds:</b>       |       |                       |                                        |                        |                        |
| Voluntary income                                      | 3     | 47,422                | -                                      | 47,422                 | 81,744                 |
| Investment income                                     | 4     | 52                    | -                                      | 52                     | 22                     |
| <b>Incoming resources from charitable activities:</b> |       |                       |                                        |                        |                        |
| Grants & contracts                                    | 5     | -                     | 608,527                                | 608,527                | 308,739                |
| <b>Total incoming resources</b>                       |       | 47,474                | 608,527                                | 656,001                | 390,505                |
| <b>RESOURCES EXPENDED</b>                             |       |                       |                                        |                        |                        |
|                                                       | 15    |                       |                                        |                        |                        |
| <b>Charitable activities</b>                          |       | 83,004                | 433,271                                | 516,275                | 382,971                |
| <b>Total resources expended</b>                       |       | 83,004                | 433,271                                | 516,275                | 382,971                |
| <b>NET INCOMING RESOURCES before transfers</b>        |       | (35,530)              | 175,256                                | 139,726                | 7,534                  |
| <b>Gross transfers between funds</b>                  | 12&13 | 64,737                | (64,737)                               | -                      | -                      |
| <b>Net incoming /(outgoing) resources</b>             |       | 29,207                | 110,519                                | 139,726                | 7,534                  |
| <b>RECONCILIATION OF FUNDS</b>                        |       |                       |                                        |                        |                        |
| <b>Funds brought forward</b>                          |       | 46,421                | 92,776                                 | 139,197                | 131,663                |
| <b>TOTAL FUNDS CARRIED FORWARD</b>                    | 12    | 75,628                | 203,295                                | 278,923                | 139,197                |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**BALANCE SHEET**  
**As at 31 March 2021**

|                                               | Notes | Unrestricted<br>funds | Restricted<br>income<br>funds | Total this<br>year<br>2021<br>£ | Total last<br>year<br>2020<br>£ |
|-----------------------------------------------|-------|-----------------------|-------------------------------|---------------------------------|---------------------------------|
|                                               |       | £                     | £                             |                                 |                                 |
| <b>FIXED ASSETS</b>                           |       |                       |                               |                                 |                                 |
| Tangible assets                               | 9     | -                     | 545                           | 545                             | 558                             |
|                                               |       | -                     | 545                           | 545                             | 558                             |
| <b>CURRENT ASSETS</b>                         |       |                       |                               |                                 |                                 |
| Debtors : Amounts falling due within one year | 10    | 296                   | 39,480                        | 39,776                          | -                               |
| Cash at bank and in hand                      |       | 75,332                | 165,809                       | 241,141                         | 150,516                         |
|                                               |       | 75,628                | 205,289                       | 280,917                         | 150,516                         |
| <b>CREDITORS</b>                              |       |                       |                               |                                 |                                 |
| Amounts falling due within one year           | 11    | -                     | 2,539                         | 2,539                           | 11,877                          |
| <b>NET CURRENT ASSETS</b>                     |       | 75,628                | 202,750                       | 278,378                         | 138,639                         |
| <b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>  |       | 75,628                | 203,295                       | 278,923                         | 139,197                         |
| <b>FUNDS</b>                                  | 12    |                       |                               |                                 |                                 |
| Unrestricted funds                            |       | 75,628                | -                             | 75,628                          | 71,293                          |
| Restricted funds                              |       | -                     | 203,295                       | 203,295                         | 67,904                          |
| <b>TOTAL FUNDS</b>                            |       | 75,628                | 203,295                       | 278,923                         | 139,197                         |

The financial statements were approved by the trustees on \_\_\_\_\_ and were signed on its behalf by:

\_\_\_\_\_  
A Watters, Chair

\_\_\_\_\_  
C Oakley, Treasurer

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

**1 Basis of preparation**

**1.1 Basis of accounting**

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.

**1.2 Change in basis of accounting**

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

**2 Accounting policies**

**2.1 Incoming resources**

**Recognition of incoming resources**

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

**Incoming resources with related expenditure**

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

**Grants and donations**

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

**Tax reclaims on donations and gifts**

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

**Contractual income and performance related grants**

This is only included in the SoFA once the related goods or services have been delivered.

**Gifts in kind**

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

**Donated services and facilities**

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

**Volunteer help**

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

**Investment income**

This is included in the accounts when receivable.

**Investment gains and losses**

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

**2.2 Expenditure & liabilities**

**Liability recognition**

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

**Governance costs**

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

**2.3 Assets**

**Tangible fixed assets for use by charity**

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt. Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

| 3 VOLUNTARY INCOME | 2021               |                    |        | 2020   |
|--------------------|--------------------|--------------------|--------|--------|
|                    | Designated         |                    | Total  | Total  |
|                    | Unrestricted Funds | & Restricted Funds |        |        |
|                    | £                  | £                  | £      | £      |
| Other income       | 47,024             | -                  | 47,024 | 81,744 |
|                    | 47,024             | -                  | 47,024 | 81,744 |

| 4 INVESTMENT INCOME      | 2021 | 2020 |
|--------------------------|------|------|
|                          | £    | £    |
| Deposit account interest | 52   | 22   |

| 5 GRANTS & CONTRACTS | 2021               |                    |         | 2020    |
|----------------------|--------------------|--------------------|---------|---------|
|                      | Designated         |                    | Total   | Total   |
|                      | Unrestricted Funds | & Restricted Funds |         |         |
|                      | £                  | £                  | £       | £       |
| Community P          | -                  | 77,183             | 77,183  | 72,304  |
| Community C          | -                  | 93,174             | 93,174  | -       |
| Community Ceredigion | -                  | 67,576             | 67,576  | -       |
| ICF                  | -                  | 3,757              | 3,757   | -       |
| IMHA                 | -                  | 198,257            | 198,257 | 200,280 |
| Carers               | -                  | 35,996             | 35,996  | -       |
| PPF                  | -                  | 49,000             | 49,000  | 14,140  |
| Ceredigion CIPA      | -                  | 70,247             | 70,247  | 14,935  |
| Tudor                | -                  | 13,337             | 13,337  | -       |
| Sue Evans/CYP        | -                  | -                  | -       | 7,080   |
|                      | -                  | 608,527            | 608,527 | 308,739 |

| 6 NET INCOMING/(OUTGOING) RESOURCES      | 2021  | 2020  |
|------------------------------------------|-------|-------|
|                                          | £     | £     |
| Net resources are stated after charging: |       |       |
| Accountancy fees                         | 3,174 | 1,140 |
| Depreciation                             | 612   | 834   |

**7 TRUSTEES' REMUNERATION AND BENEFITS**

There were no trustees' remuneration or other benefits for the year ended 31 March 2021 nor for the year ended 31 March 2020.

|                                       | 2021 | 2020 |
|---------------------------------------|------|------|
|                                       | £    | £    |
| Trustees' expenses                    | 22   | 979  |
| Number of trustees receiving expenses | 1    | 2    |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

|                      |             |             |
|----------------------|-------------|-------------|
| <b>8 STAFF COSTS</b> | <b>2021</b> | <b>2020</b> |
|                      | £           | £           |

|                    |         |         |
|--------------------|---------|---------|
| Wages and salaries | 430,594 | 325,385 |
|--------------------|---------|---------|

|                                                                         |             |             |
|-------------------------------------------------------------------------|-------------|-------------|
| The average monthly number of employees during the year was as follows: | <b>2021</b> | <b>2020</b> |
|-------------------------------------------------------------------------|-------------|-------------|

|           |    |    |
|-----------|----|----|
| Full time | 2  | 1  |
| Part time | 19 | 17 |
|           | 21 | 18 |

There were no employees with salaries in excess of £60,000

**9 TANGIBLE FIXED ASSETS**

|                       | Fixtures<br>and fittings<br>£ | Computer<br>equipment<br>£ | Total<br>£ |
|-----------------------|-------------------------------|----------------------------|------------|
| <b>COST</b>           |                               |                            |            |
| At 1 April 2020.      | 1,190                         | 21,117                     | 22,307     |
| Additions             | -                             | 599                        | 599        |
|                       | 1,190                         | 21,716                     | 22,906     |
| At 31 March 2021      |                               |                            |            |
| <b>DEPRECIATION</b>   |                               |                            |            |
| At 1 April 2020       | 1,190                         | 20,559                     | 21,749     |
| Charge for year       | -                             | 612                        | 612        |
|                       | 1,190                         | 21,171                     | 22,361     |
| At 31 March 2021      |                               |                            |            |
| <b>NET BOOK VALUE</b> |                               |                            |            |
| At 31 March 2021      | -                             | 545                        | 545        |
| At 31 March 2020      | -                             | 558                        | 558        |

|                                                        |             |             |
|--------------------------------------------------------|-------------|-------------|
| <b>10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2021</b> | <b>2020</b> |
|                                                        | £           | £           |

|                                      |        |   |
|--------------------------------------|--------|---|
| Amounts falling due within one year: | 39,776 | - |
|                                      | 39,776 | - |

|                                                          |             |             |
|----------------------------------------------------------|-------------|-------------|
| <b>11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2021</b> | <b>2020</b> |
|                                                          | £           | £           |

|                 |       |        |
|-----------------|-------|--------|
| Accruals        | 1,194 | 1,468  |
| Other creditors | 1,345 | 10,409 |
|                 | 2,539 | 11,877 |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

**12 MOVEMENT IN FUNDS**

|                           | <b>At 01.04.20</b> | <b>Funds brought forward at 01.04.20<br/>£</b> | <b>Net movement in funds<br/>£</b> | <b>Transfers between funds<br/>£</b> | <b>At 31.03.21<br/>£</b> |
|---------------------------|--------------------|------------------------------------------------|------------------------------------|--------------------------------------|--------------------------|
| <b>Unrestricted funds</b> |                    |                                                |                                    |                                      |                          |
| General fund              | -                  | 46,421                                         | (35,530)                           | 64,737                               | 75,628                   |
| <b>Restricted funds</b>   |                    |                                                |                                    |                                      |                          |
| Restricted income funds   | -                  | 92,776                                         | 175,256                            | (64,737)                             | 203,295                  |
| <b>TOTAL FUNDS</b>        | <b>-</b>           | <b>139,197</b>                                 | <b>139,726</b>                     | <b>-</b>                             | <b>278,923</b>           |

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

|                           | <b>Incoming resources<br/>£</b> | <b>Resources expended<br/>£</b> | <b>Movement in funds<br/>£</b> |
|---------------------------|---------------------------------|---------------------------------|--------------------------------|
| <b>Unrestricted funds</b> |                                 |                                 |                                |
| General fund              | 47,474                          | 83,004                          | (35,530)                       |
| <b>Restricted funds</b>   |                                 |                                 |                                |
| Restricted income funds   | 608,527                         | 433,271                         | 175,256                        |
| <b>TOTAL FUNDS</b>        | <b>656,001</b>                  | <b>516,275</b>                  | <b>139,726</b>                 |

**13 TRANSFERS BETWEEN FUNDS**

Transfers were made from WCVA, Ceredigion CIPA, ICF and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

**14 FUND DEFICITS**

As at the year end 31 March 2021, no funds were in a deficit position

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

**15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES**

|                                                         | Unrestricted funds |               | Designated funds | Restricted Funds |                  |                   |               |                |               |            |               |                |               | 2021           | 2020           |
|---------------------------------------------------------|--------------------|---------------|------------------|------------------|------------------|-------------------|---------------|----------------|---------------|------------|---------------|----------------|---------------|----------------|----------------|
|                                                         | <u>Reserves</u>    | <u>Eiriol</u> | <u>Sue</u>       | <u>Community</u> | <u>Community</u> | <u>Community-</u> |               |                |               |            |               | <u>Ceredig</u> |               | <u>Total</u>   | <u>Total</u>   |
|                                                         | £                  | £             | Evans/CYP        | P                | C                | Ceredigion        | ICF           | IMHA           | Carers        | H/Cymru    | PPF           | ion            | Tudor         | funds          | funds          |
|                                                         | £                  | £             | £                | £                | £                | £                 | £             | £              | £             |            |               | CIPA           | £             | £              | £              |
| <b>INCOMING RESOURCES</b>                               |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| Voluntary & other income                                | 47,024             |               |                  | 77,183           | 93,174           | 67,576            | 267           | 198,257        | 35,996        |            | 49,000        | 70,247         | 13,337        | 652,061        | 390,483        |
| Government Grants                                       | 398                |               |                  |                  |                  |                   | 3,490         |                |               |            |               |                |               | 3,888          |                |
| Investment income                                       | 52                 |               |                  | -                | -                | -                 | -             | -              | -             |            | -             | -              | -             | 52             | 22             |
| <b>Total incoming resources</b>                         | <b>47,474</b>      | <b>-</b>      | <b>-</b>         | <b>77,183</b>    | <b>93,174</b>    | <b>67,576</b>     | <b>3,757</b>  | <b>198,257</b> | <b>35,996</b> | <b>-</b>   | <b>49,000</b> | <b>70,247</b>  | <b>13,337</b> | <b>656,001</b> | <b>390,505</b> |
| <b>RESOURCES EXPENDED</b>                               |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| <b>Charitable activities</b>                            |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| Salaries & wages                                        | 50,804             |               |                  | 43,317           | 63,269           | 11,112            | 24,330        | 131,101        | 23,733        |            | 4,599         | 28,200         | 6,680         | 387,145        | 302,079        |
| Travel expenses                                         | 1,246              |               |                  | 388              | 145              | 393               | 45            | 4,356          | 251           |            | 162           | 376            | 10            | 7,372          | 15,573         |
| Training / Recruitment                                  | 369                |               |                  | 203              | 198              | -                 | 376           | 370            | 459           |            |               | 14             | 150           | 2,139          | 2,222          |
| CRB Checks                                              | 47                 |               |                  | 97               |                  | 47                |               | 19             |               |            |               | 28             |               | 238            | 51             |
| Subscriptions                                           | 270                |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 270            | 185            |
|                                                         | 52,736             | -             | -                | 44,005           | 63,612           | 11,552            | 24,751        | 135,846        | 24,443        | -          | 4,761         | 28,618         | 6,840         | 397,164        | 320,110        |
| <b>Support costs</b>                                    |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| Salaries & wages                                        | 2,978              |               |                  | 5,067            | 5,112            | 5,863             | 178           | 13,024         | 2,376         |            | 3,236         | 4,601          | 1,014         | 43,449         | 23,306         |
| Training                                                | 1,753              |               |                  | 11               |                  | 18                |               | 12             |               |            | 22            |                |               | 1,816          | 1,393          |
| Rent                                                    | 5,070              |               |                  | 1,550            | 1,595            | -                 | 360           | 3,637          | 496           |            | 120           | 1,038          | 538           | 14,404         | 9,282          |
| Heat & light                                            | 226                |               |                  |                  | 206              |                   |               | 299            | 81            |            |               |                | 50            | 862            | 414            |
| Room hire                                               | -                  |               |                  | -                |                  | -                 | -             | -              |               |            | -             |                |               | -              | 254            |
| Cleaning                                                | 23                 |               |                  | 112              | 71               |                   |               | 284            | 57            |            |               | 49             |               | 596            | 167            |
| Insurance                                               | 2,965              |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 2,965          | 3,158          |
| Telephone                                               | 1,498              |               |                  | 690              | 666              | 169               | 50            | 2,382          | 412           |            | 78            | 346            | 148           | 6,439          | 5,021          |
| Postage, stationery & advertising                       | 997                |               |                  | 234              | 184              | 300               |               | 738            | 117           | -          | 24            | 239            | 41            | 2,874          | 1,749          |
| Website & computing costs                               | 922                |               |                  | 830              | 946              | 222               |               | 1,570          | 357           | 11         | 13            | 535            | 14            | 5,420          | 2,836          |
| Equipment                                               | 1,188              |               |                  | 135              | 908              | 653               |               | 804            | 510           | 602        | 512           | 93             | 6             | 5,411          | 392            |
| Professional fees                                       | 9,030              |               |                  |                  | 9                | 12                |               |                | 9             |            |               | 21,488         |               | 30,548         | 11,639         |
| Bank charges                                            | 69                 |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 69             | 65             |
| AGM/Staff welfare                                       | 100                |               |                  | 75               | 50               | -                 | 25            | 150            | 25            |            |               |                | 25            | 450            | 232            |
| Accountancy                                             | 3,174              |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 3,174          | 1,140          |
| Trustees' expenses                                      | 22                 |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 22             | 979            |
| Depreciation - fixtures & fittings                      |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               | -              | -              |
| Depreciation - computer eqpt                            | 253                |               |                  | 150              |                  |                   |               | 209            |               |            |               |                |               | 612            | 834            |
|                                                         | 30,268             | -             | -                | 8,854            | 9,747            | 7,237             | 613           | 23,109         | 4,440         | 613        | 4,005         | 28,389         | 1,836         | 119,111        | 62,861         |
| <b>Total resources expended</b>                         | <b>83,004</b>      | <b>-</b>      | <b>-</b>         | <b>52,859</b>    | <b>73,359</b>    | <b>18,789</b>     | <b>25,364</b> | <b>158,955</b> | <b>28,883</b> | <b>613</b> | <b>8,766</b>  | <b>57,007</b>  | <b>8,676</b>  | <b>516,275</b> | <b>382,971</b> |
| <b>NET INCOMING/OUTGOING RESOURCES before transfers</b> |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
|                                                         | (35,530)           | -             | -                | 24,324           | 19,815           | 48,787            | (21,607)      | 39,302         | 7,113         | (613)      | 40,234        | 13,240         | 4,661         | 139,726        | 7,534          |
| Gross transfers between funds                           | 92,054             | (27,317)      | (3,430)          | (11,933)         | (4,835)          | (2,834)           | (2,000)       | (31,560)       | (3,840)       | 613        | (1,000)       | (1,518)        | (2,400)       | -              | -              |
| Net incoming/(outgoing) resources                       | -                  | -             | -                | -                | -                | -                 | -             | -              | -             | -          | -             | -              | -             | 139,726        | 7,534          |
| Funds brought forward                                   | 19,104             | 27,317        | 3,430            | 33,078           | -                | -                 | 27,275        | 27,946         | -             | -          | -             | 1,047          |               | 139,197        | 131,663        |
| <b>Funds carried forward</b>                            | <b>75,628</b>      | <b>-</b>      | <b>-</b>         | <b>45,469</b>    | <b>14,980</b>    | <b>45,953</b>     | <b>3,668</b>  | <b>35,688</b>  | <b>3,273</b>  | <b>-</b>   | <b>39,234</b> | <b>12,769</b>  | <b>2,261</b>  | <b>278,923</b> | <b>139,197</b> |

**CHARITY REGISTRATION NUMBER: 1172200**

**REPORTS AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MARCH 2021  
FOR  
ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**

L M Griffiths & Co Limited  
Chartered Certified Accountants  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**FINANCIAL STATEMENTS**  
**for the year ended 31 March 2021**

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**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2021**

**Structure, Governance and Management**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG) is a charitable incorporated organisation governed by a Constitution, dated 9 November 2016 and registered with the Charity Commission 1 April 2017 - number 1172200. This was amended on 20th February 2020 following the merger of AWW with EGC. At this point all of the assets, liabilities, services and employees were transferred from EGC to the newly merged charity.

The constitution provides for an executive committee of not less than 4 nor more than 15 members including Chair and Vice-Chair. Of these, not less than 3 and not more than 12 members are to be elected at the annual general meeting and hold office from the conclusion of that meeting. The executive committee may in addition appoint up to a maximum of 4 co-opted members providing that not more than one third of the executive committee is made up of co-opted members.

The executive committee shall hold at least 6 ordinary meetings each year.

**History**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru was conceived in 1995 from a service users group and started providing advocacy services in 1998.

In March 1998, Advocacy West Wales became a registered charity - number 1068440.

On 1 July 2009, it changed its name from Mental Health Advocacy in Pembrokeshire to Mental Health Advocacy Providers then again On 22 October 2014 to Advocacy West Wales. This change was made to reflect changes and restructuring in the provision and commissioning of services which have led to the provision of advocacy not only in Pembrokeshire but also in the surrounding counties. Upon its merger on 20 February 2020 the charity name was changed to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-ECG)

Registered Charity 1068440 was dissolved at its AGM Wed 20 September 2017, all assets, services, employees and liabilities of that charity having been transferred 1 April 2018 to Advocacy West Wales, CIO - registered number 1172200.

**Objectives and activities for the public benefit**

Advocacy West Wales - Eiriolaeth Gorllewin Cymru's objects, as set out in the governing document, are to promote improved mental health and well-being of people of all ages living in West Wales, and those areas of Wales commissioning advocacy in partnership with commissioners in West Wales, through the provision of a range of services including comprehensive independent advocacy, education, training and awareness raising.

The charity carries out these objects by:

- (i) providing advocacy services for adults experiencing mental health issues, for older people with mental health issues and/or dementia, for adults with a learning disability or autism, and for children and young people with mental health issues.
- (ii) a commitment to raising awareness of all independent forms of advocacy and other forms of advocacy. The long term aim is that independent advocacy is seen as an essential service for all people with a range of care and support needs and people experiencing the effects of disadvantages and disengagement.
- (iii) being an integral participant in developing advocacy services and promoting awareness of needs for people with a range of care and support needs both locally and in the wider West Wales arena.

The Trustees confirm that they have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning future activities.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2021**

**Achievements and Performance**

Advocacy West Wales (AWW) changed its name to Advocacy West Wales - Eiriolaeth Gorllewin Cymru (AWW-EGC) in November 2019

Advocacy West Wales (AWW) has continued the provision of advocacy services to each of the following:

- adults including older people in Pembrokeshire and in Carmarthenshire including Carers (since 1/3/20)
  - IMHA Service in Carmarthenshire, Ceredigion and Pembrokeshire
  - Independent Professional Advocacy in Ceredigion
  - ICF Development Advocacy (to 31.3.21) funded by WWCP to support regional commissioning of Independent Professional Advocacy
  - All ages Community Mental Health, Ceredigion from December 2020
  - Adults with a learning disability or autism, Pembrokeshire (following a transfer from PPF 1/1/2021)
- AWW-EGC merged with Eiriol Mental Health Advocacy from 1/3/20

**Financial Review**

Advocacy West Wales is predominantly reliant on contracts for its services.

Funds were received from:

Hywel Dda University Health Board, NHS Wales, Ceredigion County Council, Lloyds Bank Foundation, Carmarthenshire County Council, Tudor Trust, Enhancing Pembrokeshire.

Advocacy West Wales has also been fortunate in attracting a few donations.

Total income for the year was £656,001.

**Reserves Policy**

The current policy is to hold reserves equivalent to:

3 months working capital to accommodate the provision of restricted projects pending the receipt of associated restricted income.

At the end of the financial year, general unrestricted reserves were £75,628 and restricted reserves amounted to £203,295

**Future Developments**

AWW-EGC propose to tender with other providers in the region when the Independent Professional Advocacy tender across the 3 counties of Pembrokeshire, Carmarthenshire and Ceredigion is published in the autumn of 2021.

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES' REPORT**  
**31 March 2021**

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

The trustees are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed, requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

ON BEHALF OF THE BOARD

.....  
A Watters, Chairperson

Date: .....

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**TRUSTEES REPORT**  
**31 March 2021**

The trustees are pleased to present their report together with the financial statements of the charity for the year ended 31 March 2021.

**REFERENCE & ADMINISTRATIVE DETAILS**

Registered Charity number 1172200

Registered office 36/38 High Street, Haverfordwest, Pembrokeshire, SA61 2DA

Trustees

|                  |                                |
|------------------|--------------------------------|
| Andy Watters     | Chair                          |
| Isabel Stevenson | Vice Chair (resigned 20/08/20) |
| Carolyn Oakley   | Treasurer                      |
| Barbara Wilson   | (resigned 01/04/20)            |
| Jane Kelso       |                                |
| Andrew Armstrong | (resigned 19/05/21)            |
| Helen Butland    |                                |
| Dinah Davies     | (resigned 01/07/21)            |
| Huw Michael      | (resigned 01/08/21)            |
| David Jones      | (resigned 01/08/21)            |
| Emlyn Sciafone   |                                |

Accountants L M Griffiths & Co Ltd  
Chartered Certified Accountants  
1&2 Merlins Court, Winch Lane, Haverfordwest, SA61 1SB

Bankers CAF Bank Ltd  
25 Kings Hill Avenue, Kings Hill, West Malling, Kent

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**INDEPENDENT EXAMINER'S REPORT**  
**31 March 2021**

**Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru**

I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (the Trust) for the year ended 31 March 2021.

**Responsibilities and basis of report**

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

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

**Independent examiner's statement**

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body, I can confirm that I am qualified to undertake the examination because I am a registered member of ACCA which is one of the listed bodies.

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

Michael Harries FCCA  
L M Griffiths & Co Ltd  
1&2 Merlins Court  
Winch Lane  
Haverfordwest  
Pembrokeshire  
SA61 1SB

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**STATEMENT OF FINANCIAL ACTIVITIES**  
for the year ended 31 March 2021

|                                                       | Notes | Unrestricted<br>funds | Designated<br>&<br>Restricted<br>funds | Total<br>funds<br>2021 | Total<br>funds<br>2020 |
|-------------------------------------------------------|-------|-----------------------|----------------------------------------|------------------------|------------------------|
|                                                       |       | £                     | £                                      | £                      | £                      |
| <b>INCOMING RESOURCES</b>                             |       |                       |                                        |                        |                        |
| <b>Incoming resources from generated funds:</b>       |       |                       |                                        |                        |                        |
| Voluntary income                                      | 3     | 47,422                | -                                      | 47,422                 | 81,744                 |
| Investment income                                     | 4     | 52                    | -                                      | 52                     | 22                     |
| <b>Incoming resources from charitable activities:</b> |       |                       |                                        |                        |                        |
| Grants & contracts                                    | 5     | -                     | 608,527                                | 608,527                | 308,739                |
| <b>Total incoming resources</b>                       |       | 47,474                | 608,527                                | 656,001                | 390,505                |
| <b>RESOURCES EXPENDED</b>                             |       |                       |                                        |                        |                        |
|                                                       | 15    |                       |                                        |                        |                        |
| <b>Charitable activities</b>                          |       | 83,004                | 433,271                                | 516,275                | 382,971                |
| <b>Total resources expended</b>                       |       | 83,004                | 433,271                                | 516,275                | 382,971                |
| <b>NET INCOMING RESOURCES before transfers</b>        |       | (35,530)              | 175,256                                | 139,726                | 7,534                  |
| <b>Gross transfers between funds</b>                  | 12&13 | 64,737                | (64,737)                               | -                      | -                      |
| <b>Net incoming /(outgoing) resources</b>             |       | 29,207                | 110,519                                | 139,726                | 7,534                  |
| <b>RECONCILIATION OF FUNDS</b>                        |       |                       |                                        |                        |                        |
| <b>Funds brought forward</b>                          |       | 46,421                | 92,776                                 | 139,197                | 131,663                |
| <b>TOTAL FUNDS CARRIED FORWARD</b>                    | 12    | 75,628                | 203,295                                | 278,923                | 139,197                |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**BALANCE SHEET**  
**As at 31 March 2021**

|                                               | Notes | Unrestricted<br>funds | Restricted<br>income<br>funds | Total this<br>year<br>2021<br>£ | Total last<br>year<br>2020<br>£ |
|-----------------------------------------------|-------|-----------------------|-------------------------------|---------------------------------|---------------------------------|
|                                               |       | £                     | £                             |                                 |                                 |
| <b>FIXED ASSETS</b>                           |       |                       |                               |                                 |                                 |
| Tangible assets                               | 9     | -                     | 545                           | 545                             | 558                             |
|                                               |       | -                     | 545                           | 545                             | 558                             |
| <b>CURRENT ASSETS</b>                         |       |                       |                               |                                 |                                 |
| Debtors : Amounts falling due within one year | 10    | 296                   | 39,480                        | 39,776                          | -                               |
| Cash at bank and in hand                      |       | 75,332                | 165,809                       | 241,141                         | 150,516                         |
|                                               |       | 75,628                | 205,289                       | 280,917                         | 150,516                         |
| <b>CREDITORS</b>                              |       |                       |                               |                                 |                                 |
| Amounts falling due within one year           | 11    | -                     | 2,539                         | 2,539                           | 11,877                          |
| <b>NET CURRENT ASSETS</b>                     |       | 75,628                | 202,750                       | 278,378                         | 138,639                         |
| <b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>  |       | 75,628                | 203,295                       | 278,923                         | 139,197                         |
| <b>FUNDS</b>                                  | 12    |                       |                               |                                 |                                 |
| Unrestricted funds                            |       | 75,628                | -                             | 75,628                          | 71,293                          |
| Restricted funds                              |       | -                     | 203,295                       | 203,295                         | 67,904                          |
| <b>TOTAL FUNDS</b>                            |       | 75,628                | 203,295                       | 278,923                         | 139,197                         |

The financial statements were approved by the trustees on \_\_\_\_\_ and were signed on its behalf by:

\_\_\_\_\_  
A Watters, Chair

\_\_\_\_\_  
C Oakley, Treasurer

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

**1 Basis of preparation**

**1.1 Basis of accounting**

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.

**1.2 Change in basis of accounting**

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

**2 Accounting policies**

**2.1 Incoming resources**

**Recognition of incoming resources**

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources;
- the trustees are virtually certain they will receive the resources; and
- the monetary value can be measured with sufficient reliability.

**Incoming resources with related expenditure**

Where incoming resources have related expenditure (as with fundraising or contract income) the incoming resources and related expenditure are reported gross in the SoFA.

**Grants and donations**

Grants and donations are only included in the SoFA when the charity has unconditional entitlement to the resources.

**Tax reclaims on donations and gifts**

Incoming resources from tax reclaims are included in the SoFA at the same time as the gift to which they relate.

**Contractual income and performance related grants**

This is only included in the SoFA once the related goods or services have been delivered.

**Gifts in kind**

Gifts in kind are accounted for at a reasonable estimate of their value to the charity or the amount actually realised.

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Gifts in kind for use by the charity are included in the SoFA as incoming resources when receivable.

**Donated services and facilities**

These are only included in incoming resources (with an equivalent amount in resources expended) where the benefit to the charity is reasonably quantifiable, measurable and material. The value placed on these resources is the estimated value to the charity of the service or facility received.

**Volunteer help**

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

**Investment income**

This is included in the accounts when receivable.

**Investment gains and losses**

This includes any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to market value at the end of the year.

**2.2 Expenditure & liabilities**

**Liability recognition**

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

**Governance costs**

Include costs of the preparation and examination of statutory accounts, the costs of trustee meetings and cost of any legal advice to trustees on governance or constitutional matters.

**2.3 Assets**

**Tangible fixed assets for use by charity**

These are capitalised if they can be used for more than one year, and cost at least £100. They are valued at cost or a reasonable value on receipt. Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

| 3 VOLUNTARY INCOME | 2021               |                    |        | 2020   |
|--------------------|--------------------|--------------------|--------|--------|
|                    | Designated         |                    | Total  | Total  |
|                    | Unrestricted Funds | & Restricted Funds |        |        |
|                    | £                  | £                  | £      | £      |
| Other income       | 47,024             | -                  | 47,024 | 81,744 |
|                    | 47,024             | -                  | 47,024 | 81,744 |

| 4 INVESTMENT INCOME      | 2021 | 2020 |
|--------------------------|------|------|
|                          | £    | £    |
| Deposit account interest | 52   | 22   |

| 5 GRANTS & CONTRACTS | 2021               |                    |         | 2020    |
|----------------------|--------------------|--------------------|---------|---------|
|                      | Designated         |                    | Total   | Total   |
|                      | Unrestricted Funds | & Restricted Funds |         |         |
|                      | £                  | £                  | £       | £       |
| Community P          | -                  | 77,183             | 77,183  | 72,304  |
| Community C          | -                  | 93,174             | 93,174  | -       |
| Community Ceredigion | -                  | 67,576             | 67,576  | -       |
| ICF                  | -                  | 3,757              | 3,757   | -       |
| IMHA                 | -                  | 198,257            | 198,257 | 200,280 |
| Carers               | -                  | 35,996             | 35,996  | -       |
| PPF                  | -                  | 49,000             | 49,000  | 14,140  |
| Ceredigion CIPA      | -                  | 70,247             | 70,247  | 14,935  |
| Tudor                | -                  | 13,337             | 13,337  | -       |
| Sue Evans/CYP        | -                  | -                  | -       | 7,080   |
|                      | -                  | 608,527            | 608,527 | 308,739 |

| 6 NET INCOMING/(OUTGOING) RESOURCES      | 2021  | 2020  |
|------------------------------------------|-------|-------|
|                                          | £     | £     |
| Net resources are stated after charging: |       |       |
| Accountancy fees                         | 3,174 | 1,140 |
| Depreciation                             | 612   | 834   |

**7 TRUSTEES' REMUNERATION AND BENEFITS**

There were no trustees' remuneration or other benefits for the year ended 31 March 2021 nor for the year ended 31 March 2020.

|                                       | 2021 | 2020 |
|---------------------------------------|------|------|
|                                       | £    | £    |
| Trustees' expenses                    | 22   | 979  |
| Number of trustees receiving expenses | 1    | 2    |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

|                      |             |             |
|----------------------|-------------|-------------|
| <b>8 STAFF COSTS</b> | <b>2021</b> | <b>2020</b> |
|                      | £           | £           |

|                    |         |         |
|--------------------|---------|---------|
| Wages and salaries | 430,594 | 325,385 |
|--------------------|---------|---------|

|                                                                         |             |             |
|-------------------------------------------------------------------------|-------------|-------------|
| The average monthly number of employees during the year was as follows: | <b>2021</b> | <b>2020</b> |
|-------------------------------------------------------------------------|-------------|-------------|

|           |    |    |
|-----------|----|----|
| Full time | 2  | 1  |
| Part time | 19 | 17 |
|           | 21 | 18 |

There were no employees with salaries in excess of £60,000

**9 TANGIBLE FIXED ASSETS**

|                       | Fixtures<br>and fittings<br>£ | Computer<br>equipment<br>£ | Total<br>£ |
|-----------------------|-------------------------------|----------------------------|------------|
| <b>COST</b>           |                               |                            |            |
| At 1 April 2020.      | 1,190                         | 21,117                     | 22,307     |
| Additions             | -                             | 599                        | 599        |
|                       | 1,190                         | 21,716                     | 22,906     |
| At 31 March 2021      |                               |                            |            |
| <b>DEPRECIATION</b>   |                               |                            |            |
| At 1 April 2020       | 1,190                         | 20,559                     | 21,749     |
| Charge for year       | -                             | 612                        | 612        |
|                       | 1,190                         | 21,171                     | 22,361     |
| At 31 March 2021      |                               |                            |            |
| <b>NET BOOK VALUE</b> |                               |                            |            |
| At 31 March 2021      | -                             | 545                        | 545        |
| At 31 March 2020      | -                             | 558                        | 558        |

|                                                        |             |             |
|--------------------------------------------------------|-------------|-------------|
| <b>10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2021</b> | <b>2020</b> |
|                                                        | £           | £           |

|                                      |        |   |
|--------------------------------------|--------|---|
| Amounts falling due within one year: | 39,776 | - |
|                                      | 39,776 | - |

|                                                          |             |             |
|----------------------------------------------------------|-------------|-------------|
| <b>11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2021</b> | <b>2020</b> |
|                                                          | £           | £           |

|                 |       |        |
|-----------------|-------|--------|
| Accruals        | 1,194 | 1,468  |
| Other creditors | 1,345 | 10,409 |
|                 | 2,539 | 11,877 |

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

**12 MOVEMENT IN FUNDS**

|                           | <b>At 01.04.20</b> | <b>Funds brought forward at 01.04.20<br/>£</b> | <b>Net movement in funds<br/>£</b> | <b>Transfers between funds<br/>£</b> | <b>At 31.03.21<br/>£</b> |
|---------------------------|--------------------|------------------------------------------------|------------------------------------|--------------------------------------|--------------------------|
| <b>Unrestricted funds</b> |                    |                                                |                                    |                                      |                          |
| General fund              | -                  | 46,421                                         | (35,530)                           | 64,737                               | 75,628                   |
| <b>Restricted funds</b>   |                    |                                                |                                    |                                      |                          |
| Restricted income funds   | -                  | 92,776                                         | 175,256                            | (64,737)                             | 203,295                  |
| <b>TOTAL FUNDS</b>        | <b>-</b>           | <b>139,197</b>                                 | <b>139,726</b>                     | <b>-</b>                             | <b>278,923</b>           |

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

|                           | <b>Incoming resources<br/>£</b> | <b>Resources expended<br/>£</b> | <b>Movement in funds<br/>£</b> |
|---------------------------|---------------------------------|---------------------------------|--------------------------------|
| <b>Unrestricted funds</b> |                                 |                                 |                                |
| General fund              | 47,474                          | 83,004                          | (35,530)                       |
| <b>Restricted funds</b>   |                                 |                                 |                                |
| Restricted income funds   | 608,527                         | 433,271                         | 175,256                        |
| <b>TOTAL FUNDS</b>        | <b>656,001</b>                  | <b>516,275</b>                  | <b>139,726</b>                 |

**13 TRANSFERS BETWEEN FUNDS**

Transfers were made from WCVA, Ceredigion CIPA, ICF and IMHA to unrestricted income by way of a charge made to restricted funds for central support services

**14 FUND DEFICITS**

As at the year end 31 March 2021, no funds were in a deficit position

**ADVOCACY WEST WALES - EIRIOLAETH GORLLEWIN CYMRU**  
**NOTES TO THE ACCOUNTS**  
**31 March 2021**

**15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES**

|                                                         | Unrestricted funds |               | Designated funds | Restricted Funds |                  |                   |               |                |               |            |               |                |               | 2021           | 2020           |
|---------------------------------------------------------|--------------------|---------------|------------------|------------------|------------------|-------------------|---------------|----------------|---------------|------------|---------------|----------------|---------------|----------------|----------------|
|                                                         | <u>Reserves</u>    | <u>Eiriol</u> | <u>Sue</u>       | <u>Community</u> | <u>Community</u> | <u>Community-</u> |               |                |               |            |               | <u>Ceredig</u> |               | <u>Total</u>   | <u>Total</u>   |
|                                                         | £                  | £             | Evans/CYP        | P                | C                | Ceredigion        | ICF           | IMHA           | Carers        | H/Cymru    | PPF           | ion            | Tudor         | funds          | funds          |
|                                                         | £                  | £             | £                | £                | £                | £                 | £             | £              | £             |            |               | CIPA           | £             | £              | £              |
| <b>INCOMING RESOURCES</b>                               |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| Voluntary & other income                                | 47,024             |               |                  | 77,183           | 93,174           | 67,576            | 267           | 198,257        | 35,996        |            | 49,000        | 70,247         | 13,337        | 652,061        | 390,483        |
| Government Grants                                       | 398                |               |                  |                  |                  |                   | 3,490         |                |               |            |               |                |               | 3,888          |                |
| Investment income                                       | 52                 |               |                  | -                | -                | -                 | -             | -              | -             |            | -             | -              | -             | 52             | 22             |
| <b>Total incoming resources</b>                         | <b>47,474</b>      | <b>-</b>      | <b>-</b>         | <b>77,183</b>    | <b>93,174</b>    | <b>67,576</b>     | <b>3,757</b>  | <b>198,257</b> | <b>35,996</b> | <b>-</b>   | <b>49,000</b> | <b>70,247</b>  | <b>13,337</b> | <b>656,001</b> | <b>390,505</b> |
| <b>RESOURCES EXPENDED</b>                               |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| <b>Charitable activities</b>                            |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| Salaries & wages                                        | 50,804             |               |                  | 43,317           | 63,269           | 11,112            | 24,330        | 131,101        | 23,733        |            | 4,599         | 28,200         | 6,680         | 387,145        | 302,079        |
| Travel expenses                                         | 1,246              |               |                  | 388              | 145              | 393               | 45            | 4,356          | 251           |            | 162           | 376            | 10            | 7,372          | 15,573         |
| Training / Recruitment                                  | 369                |               |                  | 203              | 198              | -                 | 376           | 370            | 459           |            |               | 14             | 150           | 2,139          | 2,222          |
| CRB Checks                                              | 47                 |               |                  | 97               |                  | 47                |               | 19             |               |            |               | 28             |               | 238            | 51             |
| Subscriptions                                           | 270                |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 270            | 185            |
|                                                         | 52,736             | -             | -                | 44,005           | 63,612           | 11,552            | 24,751        | 135,846        | 24,443        | -          | 4,761         | 28,618         | 6,840         | 397,164        | 320,110        |
| <b>Support costs</b>                                    |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
| Salaries & wages                                        | 2,978              |               |                  | 5,067            | 5,112            | 5,863             | 178           | 13,024         | 2,376         |            | 3,236         | 4,601          | 1,014         | 43,449         | 23,306         |
| Training                                                | 1,753              |               |                  | 11               |                  | 18                |               | 12             |               |            | 22            |                |               | 1,816          | 1,393          |
| Rent                                                    | 5,070              |               |                  | 1,550            | 1,595            | -                 | 360           | 3,637          | 496           |            | 120           | 1,038          | 538           | 14,404         | 9,282          |
| Heat & light                                            | 226                |               |                  |                  | 206              |                   |               | 299            | 81            |            |               |                | 50            | 862            | 414            |
| Room hire                                               | -                  |               |                  | -                |                  | -                 | -             | -              |               |            | -             |                |               | -              | 254            |
| Cleaning                                                | 23                 |               |                  | 112              | 71               |                   |               | 284            | 57            |            |               | 49             |               | 596            | 167            |
| Insurance                                               | 2,965              |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 2,965          | 3,158          |
| Telephone                                               | 1,498              |               |                  | 690              | 666              | 169               | 50            | 2,382          | 412           |            | 78            | 346            | 148           | 6,439          | 5,021          |
| Postage, stationery & advertising                       | 997                |               |                  | 234              | 184              | 300               |               | 738            | 117           | -          | 24            | 239            | 41            | 2,874          | 1,749          |
| Website & computing costs                               | 922                |               |                  | 830              | 946              | 222               |               | 1,570          | 357           | 11         | 13            | 535            | 14            | 5,420          | 2,836          |
| Equipment                                               | 1,188              |               |                  | 135              | 908              | 653               |               | 804            | 510           | 602        | 512           | 93             | 6             | 5,411          | 392            |
| Professional fees                                       | 9,030              |               |                  |                  | 9                | 12                |               |                | 9             |            |               | 21,488         |               | 30,548         | 11,639         |
| Bank charges                                            | 69                 |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 69             | 65             |
| AGM/Staff welfare                                       | 100                |               |                  | 75               | 50               | -                 | 25            | 150            | 25            |            |               |                | 25            | 450            | 232            |
| Accountancy                                             | 3,174              |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 3,174          | 1,140          |
| Trustees' expenses                                      | 22                 |               |                  |                  |                  |                   |               |                |               |            |               |                |               | 22             | 979            |
| Depreciation - fixtures & fittings                      |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               | -              | -              |
| Depreciation - computer eqpt                            | 253                |               |                  | 150              |                  |                   |               | 209            |               |            |               |                |               | 612            | 834            |
|                                                         | 30,268             | -             | -                | 8,854            | 9,747            | 7,237             | 613           | 23,109         | 4,440         | 613        | 4,005         | 28,389         | 1,836         | 119,111        | 62,861         |
| <b>Total resources expended</b>                         | <b>83,004</b>      | <b>-</b>      | <b>-</b>         | <b>52,859</b>    | <b>73,359</b>    | <b>18,789</b>     | <b>25,364</b> | <b>158,955</b> | <b>28,883</b> | <b>613</b> | <b>8,766</b>  | <b>57,007</b>  | <b>8,676</b>  | <b>516,275</b> | <b>382,971</b> |
| <b>NET INCOMING/OUTGOING RESOURCES before transfers</b> |                    |               |                  |                  |                  |                   |               |                |               |            |               |                |               |                |                |
|                                                         | (35,530)           | -             | -                | 24,324           | 19,815           | 48,787            | (21,607)      | 39,302         | 7,113         | (613)      | 40,234        | 13,240         | 4,661         | 139,726        | 7,534          |
| Gross transfers between funds                           | 92,054             | (27,317)      | (3,430)          | (11,933)         | (4,835)          | (2,834)           | (2,000)       | (31,560)       | (3,840)       | 613        | (1,000)       | (1,518)        | (2,400)       | -              | -              |
| Net incoming/(outgoing) resources                       | -                  | -             | -                | -                | -                | -                 | -             | -              | -             | -          | -             | -              | -             | 139,726        | 7,534          |
| Funds brought forward                                   | 19,104             | 27,317        | 3,430            | 33,078           | -                | -                 | 27,275        | 27,946         | -             | -          | -             | 1,047          |               | 139,197        | 131,663        |
| <b>Funds carried forward</b>                            | <b>75,628</b>      | <b>-</b>      | <b>-</b>         | <b>45,469</b>    | <b>14,980</b>    | <b>45,953</b>     | <b>3,668</b>  | <b>35,688</b>  | <b>3,273</b>  | <b>-</b>   | <b>39,234</b> | <b>12,769</b>  | <b>2,261</b>  | <b>278,923</b> | <b>139,197</b> |