

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

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 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

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

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

|                                               | Notes | Unrestricted<br>funds | Restricted<br>income<br>funds | Total this<br>year<br>2023<br>£ | Total last<br>year<br>2022<br>£ |
|-----------------------------------------------|-------|-----------------------|-------------------------------|---------------------------------|---------------------------------|
|                                               |       | £                     | £                             |                                 |                                 |
| <b>FIXED ASSETS</b>                           |       |                       |                               |                                 |                                 |
| Tangible assets                               | 9     | 1,424                 | 1,217                         | 2,641                           | 3,132                           |
|                                               |       | 1,424                 | 1,217                         | 2,641                           | 3,132                           |
| <b>CURRENT ASSETS</b>                         |       |                       |                               |                                 |                                 |
| 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                         |
| <b>CREDITORS</b>                              |       |                       |                               |                                 |                                 |
| Amounts falling due within one year           | 11    | -                     | 16,929                        | 16,929                          | 16,141                          |
| <b>NET CURRENT ASSETS</b>                     |       | 129,697               | 173,756                       | 303,453                         | 200,013                         |
| <b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>  |       | 131,121               | 174,973                       | 306,094                         | 203,145                         |
| <b>FUNDS</b>                                  | 12    |                       |                               |                                 |                                 |
| Unrestricted funds                            |       | 131,121               | -                             | 131,121                         | 86,874                          |
| Restricted funds                              |       | -                     | 174,973                       | 174,973                         | 116,271                         |
| <b>TOTAL FUNDS</b>                            |       | 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**

|                      |             |             |
|----------------------|-------------|-------------|
| <b>8 STAFF COSTS</b> | <b>2023</b> | <b>2022</b> |
|                      | £           | £           |

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

|                                                                         |             |             |
|-------------------------------------------------------------------------|-------------|-------------|
| The average monthly number of employees during the year was as follows: | <b>2023</b> | <b>2022</b> |
|-------------------------------------------------------------------------|-------------|-------------|

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

|                                                        |             |             |
|--------------------------------------------------------|-------------|-------------|
| <b>10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2023</b> | <b>2022</b> |
|                                                        | £           | £           |

|                                      |     |   |
|--------------------------------------|-----|---|
| Amounts falling due within one year: | 690 | - |
|                                      | 690 | - |

|                                                          |             |             |
|----------------------------------------------------------|-------------|-------------|
| <b>11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2023</b> | <b>2022</b> |
|                                                          | £           | £           |

|                 |        |        |
|-----------------|--------|--------|
| 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**

|                                                               | <b>At 01.04.22</b> | <b>Funds brought forward at 01.04.22<br/>£</b> | <b>Net movement in funds<br/>£</b> | <b>Transfers between funds<br/>£</b> | <b>At 31.03.23<br/>£</b>       |
|---------------------------------------------------------------|--------------------|------------------------------------------------|------------------------------------|--------------------------------------|--------------------------------|
| <b>Unrestricted funds</b>                                     |                    |                                                |                                    |                                      |                                |
| General fund                                                  | -                  | 86,874                                         | (30,162)                           | -                                    | 56,712                         |
| <b>Restricted funds</b>                                       |                    |                                                |                                    |                                      |                                |
| Restricted income funds                                       | -                  | 116,271                                        | 133,111                            | -                                    | 249,382                        |
| <b>TOTAL FUNDS</b>                                            | <b>-</b>           | <b>203,145</b>                                 | <b>102,949</b>                     | <b>-</b>                             | <b>306,094</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                                                  |                    |                                                | 83,264                             | 113,426                              | (30,162)                       |
| <b>Restricted funds</b>                                       |                    |                                                |                                    |                                      |                                |
| Restricted income funds                                       |                    |                                                | 849,459                            | 716,348                              | 133,111                        |
| <b>TOTAL FUNDS</b>                                            |                    |                                                | <b>932,723</b>                     | <b>829,774</b>                       | <b>102,949</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 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**

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

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

|                                               | Notes | Unrestricted<br>funds | Restricted<br>income<br>funds | Total this<br>year<br>2023<br>£ | Total last<br>year<br>2022<br>£ |
|-----------------------------------------------|-------|-----------------------|-------------------------------|---------------------------------|---------------------------------|
|                                               |       | £                     | £                             |                                 |                                 |
| <b>FIXED ASSETS</b>                           |       |                       |                               |                                 |                                 |
| Tangible assets                               | 9     | 1,424                 | 1,217                         | 2,641                           | 3,132                           |
|                                               |       | 1,424                 | 1,217                         | 2,641                           | 3,132                           |
| <b>CURRENT ASSETS</b>                         |       |                       |                               |                                 |                                 |
| 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                         |
| <b>CREDITORS</b>                              |       |                       |                               |                                 |                                 |
| Amounts falling due within one year           | 11    | -                     | 16,929                        | 16,929                          | 16,141                          |
| <b>NET CURRENT ASSETS</b>                     |       | 129,697               | 173,756                       | 303,453                         | 200,013                         |
| <b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>  |       | 131,121               | 174,973                       | 306,094                         | 203,145                         |
| <b>FUNDS</b>                                  | 12    |                       |                               |                                 |                                 |
| Unrestricted funds                            |       | 131,121               | -                             | 131,121                         | 86,874                          |
| Restricted funds                              |       | -                     | 174,973                       | 174,973                         | 116,271                         |
| <b>TOTAL FUNDS</b>                            |       | 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**

|                      |             |             |
|----------------------|-------------|-------------|
| <b>8 STAFF COSTS</b> | <b>2023</b> | <b>2022</b> |
|                      | £           | £           |

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

|                                                                         |             |             |
|-------------------------------------------------------------------------|-------------|-------------|
| The average monthly number of employees during the year was as follows: | <b>2023</b> | <b>2022</b> |
|-------------------------------------------------------------------------|-------------|-------------|

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

|                                                        |             |             |
|--------------------------------------------------------|-------------|-------------|
| <b>10 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2023</b> | <b>2022</b> |
|                                                        | £           | £           |

|                                      |     |   |
|--------------------------------------|-----|---|
| Amounts falling due within one year: | 690 | - |
|                                      | 690 | - |

|                                                          |             |             |
|----------------------------------------------------------|-------------|-------------|
| <b>11 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR</b> | <b>2023</b> | <b>2022</b> |
|                                                          | £           | £           |

|                 |        |        |
|-----------------|--------|--------|
| 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**

|                           | <b>At 01.04.22</b> | <b>Funds brought forward at 01.04.22<br/>£</b> | <b>Net movement in funds<br/>£</b> | <b>Transfers between funds<br/>£</b> | <b>At 31.03.23<br/>£</b> |
|---------------------------|--------------------|------------------------------------------------|------------------------------------|--------------------------------------|--------------------------|
| <b>Unrestricted funds</b> |                    |                                                |                                    |                                      |                          |
| General fund              | -                  | 86,874                                         | (30,162)                           | -                                    | 56,712                   |
| <b>Restricted funds</b>   |                    |                                                |                                    |                                      |                          |
| Restricted income funds   | -                  | 116,271                                        | 133,111                            | -                                    | 249,382                  |
| <b>TOTAL FUNDS</b>        | <b>-</b>           | <b>203,145</b>                                 | <b>102,949</b>                     | <b>-</b>                             | <b>306,094</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              | 83,264                          | 113,426                         | (30,162)                       |
| <b>Restricted funds</b>   |                                 |                                 |                                |
| Restricted income funds   | 849,459                         | 716,348                         | 133,111                        |
| <b>TOTAL FUNDS</b>        | <b>932,723</b>                  | <b>829,774</b>                  | <b>102,949</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 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     |