

# Advocacy West Wales — Eiriolaeth Gorllewin Cymru



Advocacy West Wales  
Eiriolaeth Gorllewin Cymru

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

## ANNUAL REPORT 2023 - 2024

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 2023-2024**

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

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

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



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

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

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

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

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

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



Andrew Watters  
Chairperson, AWW-EGC

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### **Chief Officer's Report April 2023-March 2024**

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

At the time of writing we have achieved:

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



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

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

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

## Arrivals and Departures:

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

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

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

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

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

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

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

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

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

Quote from a  
service user;

"Advocacy was a  
game changer "

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

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

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

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

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

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

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

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



Natasha Fox, Chief Officer, September 2024



## COMMUNITY MENTAL HEALTH ADVOCACY REPORT APRIL 2023- MARCH 2024

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

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

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

### Work carried out across the 3 counties from July – March

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

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

Mental health: 1813

Access to health services: 1268

Accommodation: 1213

Access to other services: 1135

Finance Benefits: 850


Physical health: 737

Daily activity: 668

Children contact care: 647

Medication: 549

Family friends: 524



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

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

### **The Community Mental Health Advocacy Service – Pembrokeshire**

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

### **The Community Mental Health Advocacy Service – Carmarthenshire**

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

### **The Community Mental Health Advocacy Service – Ceredigion**

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

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

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

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

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

Kate Bailey - Assistant Manager

#### **Quotes from Users**

“Amazing help!”

“You’ve been my rock!”

“You made me feel worthwhile and some positivity.”

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

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

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

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

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

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

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

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

Shelly Newton, Independent Advocate and Service Manager



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

# AWW-EGC Team Charter

## CLIENT LED

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

## GOLD STANDARD SERVICE

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

## INDEPENDENCE

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

## ONE TEAM

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

## DEVELOPMENT

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

## COMMITMENT

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

## RESPONSIBILITY AND ACCOUNTABILITY

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

## 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.

## EQUALITY

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

## Trustees

Andy Watters, Chair

Carolyn Oakley, Treasurer (*resigned July 24*)

Jane Kelso, Trustee

Helen Butland, Trustee

Emlyn Schiavone, Vice-Chair

Dan Rosie (*from Oct 2023*)

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## Staff Team

Natasha Fox, Chief Officer

Kate Bailey, Deputy Manager

Sue Blantern, Office Manager/Administrator

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

Nia Williams, Supervisor/IMHA, Carmarthenshire

Sarah Thomas, IMHA, Carmarthenshire

Sue Williams, Drop in service Advocate

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

Rebecca Arnold, IMHA Carmarthenshire

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

Clare Singleton, Community Advocate,  
Carmarthenshire

Peggy Spooner, Project Development Manager

Elaine Lewis, Independent Advocate,  
Carmarthenshire

Kate Roberts, Community Advocate,  
Pembrokeshire

Shelly Newton, LD & AP Advocate

Ceridwen Kabir, Community Advocate Ceredigion

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

Natalie Sen, IMHA/3CIPA Advocate

Abi Alexander, Independent Advocate

Joanne Davies, Client Caseworker

Chloe Ellis, CCW (*resigned April 23*)

Helen Hillary, Advocate (*resigned September 23*)

Rachel Dillon, LD & AP Advocate

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

Cara Gaskill (*resigned April 23*)

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

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

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

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

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

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

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

Anna Jenkins, CCW (*from June 24*)



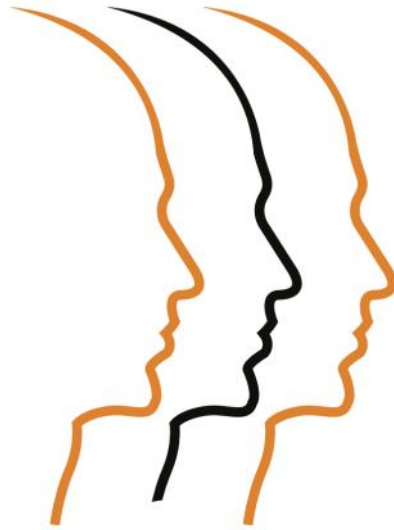
# With thanks to our Funders



the  
**Tudor**trust

Hywel Davies Trust





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

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

**CHARITY REGISTRATION NUMBER: 1172200**

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

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

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

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

**Structure, Governance and Management**

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

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

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

**History**

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

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

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

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

**Objectives and activities for the public benefit**

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

The charity carries out these objects by:

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

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

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

**Achievements and Performance**

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

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

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

**Financial Review**

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

Funds were received from:

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

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

Total income for the year was £737,835.

**Reserves Policy**

The current policy is to hold reserves equivalent to:

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

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

**Future Developments**

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

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

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

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

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

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

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

ON BEHALF OF THE BOARD

  
A Watters, Chairperson

Date: 11-10-2024 .

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

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

**REFERENCE & ADMINISTRATIVE DETAILS**

Registered Charity number 1172200

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

Trustees

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

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

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

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

**Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru**  
I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (the Trust) for the year ended 31 March 2024.

**Responsibilities and basis of report**

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

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

**Independent examiner's statement**

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

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

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

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

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

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

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

As at 31 March 2024

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

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

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

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

**1 Basis of preparation**

**1.1 Basis of accounting**

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

**1.2 Change in basis of accounting**

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

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

**2 Accounting policies**

**2.1 Incoming resources**

**Recognition of incoming resources**

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

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

**Incoming resources with related expenditure**

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

**Grants and donations**

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

**Tax reclaims on donations and gifts**

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

**Contractual income and performance related grants**

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

**Gifts in kind**

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

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

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

**Donated services and facilities**

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

**Volunteer help**

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

**Investment income**

This is included in the accounts when receivable.

**Investment gains and losses**

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

**2.2 Expenditure & liabilities**

**Liability recognition**

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

**Governance costs**

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

**2.3 Assets**

**Tangible fixed assets for use by charity**

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

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

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

**3 VOLUNTARY INCOME**

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

**4 INVESTMENT INCOME**

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

**5 GRANTS & CONTRACTS**

|                      | <b>2024</b>               |                                          |              | <b>2023</b>  |
|----------------------|---------------------------|------------------------------------------|--------------|--------------|
|                      | <b>Unrestricted Funds</b> | <b>Designated &amp; Restricted Funds</b> | <b>Total</b> | <b>Total</b> |
|                      | <b>£</b>                  | <b>£</b>                                 | <b>£</b>     | <b>£</b>     |
| Community P          | -                         | 73,812                                   | 73,812       | 72,304       |
| Community C          | -                         | 91,753                                   | 91,753       | 89,878       |
| Community Ceredigion | -                         | 50,084                                   | 50,084       | 64,972       |
| Henry Smith          | -                         | 60,000                                   | 60,000       | 60,000       |
| IMHA                 | -                         | 197,250                                  | 197,250      | 197,250      |
| Carers               | -                         | -                                        | -            | -            |
| PPF                  | -                         | -                                        | -            | -            |
| CIPA                 | -                         | 228,296                                  | 228,296      | 221,103      |
| Lloyds               | -                         | -                                        | -            | -            |
| Tudor                | -                         | 32,000                                   | 32,000       | 25,200       |
| Hywel Davies Trust   | -                         | -                                        | -            | 118,752      |
|                      | -                         | 733,195                                  | 733,195      | 849,459      |

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

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

**7 TRUSTEES' REMUNERATION AND BENEFITS**

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

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

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

**8 STAFF COSTS**

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

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

**9 TANGIBLE FIXED ASSETS**

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

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

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

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

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

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

**12 MOVEMENT IN FUNDS**

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

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

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

**13 TRANSFERS BETWEEN FUNDS**

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

**14 FUND DEFICITS**

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

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

15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES

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

**CHARITY REGISTRATION NUMBER: 1172200**

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

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

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

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

**Structure, Governance and Management**

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

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

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

**History**

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

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

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

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

**Objectives and activities for the public benefit**

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

The charity carries out these objects by:

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

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

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

**Achievements and Performance**

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

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

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

**Financial Review**

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

Funds were received from:

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

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

Total income for the year was £737,835.

**Reserves Policy**

The current policy is to hold reserves equivalent to:

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

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

**Future Developments**

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

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

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

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

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

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

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

ON BEHALF OF THE BOARD

  
A Watters, Chairperson

Date: 11-10-2024 .

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

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

**REFERENCE & ADMINISTRATIVE DETAILS**

Registered Charity number 1172200

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

Trustees

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

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

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

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

**Independent examiner's report to the trustees of Advocacy West Wales - Eiriolaeth Gorllewin Cymru**  
I report to the charity trustees on my examination of the accounts of Advocacy West Wales - Eiriolaeth Gorllewin Cymru (the Trust) for the year ended 31 March 2024.

**Responsibilities and basis of report**

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

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

**Independent examiner's statement**

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

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

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

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

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

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

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

As at 31 March 2024

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

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

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

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

**1 Basis of preparation**

**1.1 Basis of accounting**

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

**1.2 Change in basis of accounting**

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

**1.3 Changes to previous accounts**

No changes have been made to accounts for previous years.

**2 Accounting policies**

**2.1 Incoming resources**

**Recognition of incoming resources**

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

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

**Incoming resources with related expenditure**

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

**Grants and donations**

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

**Tax reclaims on donations and gifts**

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

**Contractual income and performance related grants**

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

**Gifts in kind**

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

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

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

**Donated services and facilities**

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

**Volunteer help**

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

**Investment income**

This is included in the accounts when receivable.

**Investment gains and losses**

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

**2.2 Expenditure & liabilities**

**Liability recognition**

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

**Governance costs**

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

**2.3 Assets**

**Tangible fixed assets for use by charity**

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

Fixture and fittings - 10 % Straight Line

Computer equipment - 33 % Straight Line

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

**3 VOLUNTARY INCOME**

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

**4 INVESTMENT INCOME**

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

**5 GRANTS & CONTRACTS**

|                      | <b>2024</b>                |                                          |            | <b>2023</b> |
|----------------------|----------------------------|------------------------------------------|------------|-------------|
|                      | Unrestricted<br>Funds<br>£ | Designated<br>& Restricted<br>Funds<br>£ | Total<br>£ | Total<br>£  |
| Community P          | -                          | 73,812                                   | 73,812     | 72,304      |
| Community C          | -                          | 91,753                                   | 91,753     | 89,878      |
| Community Ceredigion | -                          | 50,084                                   | 50,084     | 64,972      |
| Henry Smith          | -                          | 60,000                                   | 60,000     | 60,000      |
| IMHA                 | -                          | 197,250                                  | 197,250    | 197,250     |
| Carers               | -                          | -                                        | -          | -           |
| PPF                  | -                          | -                                        | -          | -           |
| CIPA                 | -                          | 228,296                                  | 228,296    | 221,103     |
| Lloyds               | -                          | -                                        | -          | -           |
| Tudor                | -                          | 32,000                                   | 32,000     | 25,200      |
| Hywel Davies Trust   | -                          | -                                        | -          | 118,752     |
|                      | -                          | 733,195                                  | 733,195    | 849,459     |

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

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

**7 TRUSTEES' REMUNERATION AND BENEFITS**

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

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

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

**8 STAFF COSTS**

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

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

**9 TANGIBLE FIXED ASSETS**

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

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

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

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

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

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

**12 MOVEMENT IN FUNDS**

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

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

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

**13 TRANSFERS BETWEEN FUNDS**

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

**14 FUND DEFICITS**

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

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

15 DETAILED ANALYSIS OF STATEMENT OF FINANCIAL ACTIVITIES

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