

# PERSON TO PERSON CITIZEN ADVOCACY

England & Wales · Charity number 1185625

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2019-10-04

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

## Contact

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**Address** Bargoed YMCA  
Aeron Place  
Bargoed  
CF81 8JA

**Phone** 07436102162

**Email** [advocacy@persontoperson.org.uk](mailto:advocacy@persontoperson.org.uk)

**Website** [persontoperson.org.uk](http://persontoperson.org.uk)

## Activities

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**Objects:** PROMOTE THE RELIEF OF PEOPLE WITH A LEARNING DISABILITY WITHIN SOUTH WALES AND TO ASSIST THOSE PEOPLE TO REALISE THEIR FULL POTENTIAL TO LEAD FULFILLING LIVES BY THE PROVISION OF A SERVICE CALCULATED TO: I. ASSIST PERSONS AS DEFINED ABOVE TO OBTAIN THEIR FULL RIGHTS AND PRIVILEGES AS A CITIZEN; II. PROVIDE LONG TERM FRIENDSHIP AND SUPPORT; AND III. PROVIDE INFORMATION TO PEOPLE WITH A LEARNING DISABILITY.

**Activities:** The relief of people with a learning disability within Mid Glamorgan. To assist those people to realise their full potential and to lead fulfilling lives. To assist those people to obtain their full rights and privileges as a citizen. To provide long term friendship and support. To provide information to people with a learning disability.

## Classification

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- **How:** Provides Advocacy/advice/information
- **What:** Disability, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** People With Disabilities

## Geography

- Caerphilly

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£40,500	£38,366	-	-
2024-03-31	£40,500	£37,926	-	-
2023-03-31	£40,500	£37,829	-	-
2022-03-31	£30,500	£34,463	-	-
2021-03-31	£31,480	£29,503	-	-

## Trustees

Name	Role	Appointed
<b>ALUN THOMAS</b>	Chair	1995-05-09
Linda Davies		2017-02-01
Lynne Gornicki		2015-11-01
Marc Andrew Evans		2024-02-12
Will Thomas		1995-05-09

**PERSON TO PERSON CITIZEN ADVOCACY**

England & Wales - Charity number 1185625

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# Accounts

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# ANNUAL REPORT

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2025



## Person to Person Citizen Advocacy

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**2. Citizen Advocacy Project Report**

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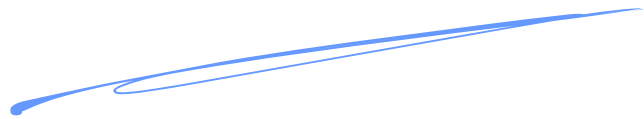
**4. Financial Report**

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# Chairpersons Report



*Alun Thomas*



Person to Person was established in 1995 so that in May 2025, there will have been a citizen advocacy presence in Caerphilly County Borough for 30 years. Initially known as the Mid Glamorgan Citizen Advocacy Project, it was renamed Person to Person following the introduction of the Unitary Authorities in Wales. The continued success of Person to Person is due to the work done by the many citizen advocates alongside their partners, a person with a learning disability. These partnerships have been expertly supported by our Citizen Advocacy Co-ordinators over the years and this continues to the present day with Jackie Hughes as the Co-ordinator.

The success of Person to Person relies on individuals within the community being prepared to give their time freely to stand alongside a person with a learning disability. It is at this moment that citizen advocacy partnerships are formed.

Throughout the year the Citizen Advocacy Co-ordinator has been supporting, on average, 27 partnerships. The majority of these are long-term partnerships which is the essence of successful citizen advocacy. Partnerships do, on occasion, come to an end. This may be, for example, as a result of individuals moving out of the area or the sad death of a partner. The Co-ordinator is aware of other people who would benefit from having a citizen advocate and the recruitment and matching of potential citizen advocates is an on-going aspect of the work.

# Chairpersons Report



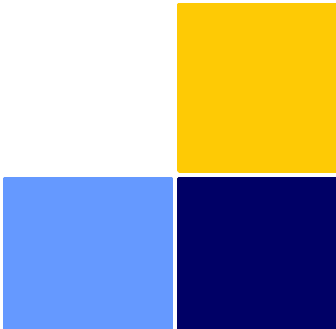
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A key part of the Co-ordinator's role is to offer support and advice to the citizen advocates as they address the issues that are pertinent to their partnerships. Following the recruitment and matching process carried out by the Co-ordinator, another 27 people are in a position to provide friendship and practical help on a one-to-one basis to an individual with a learning disability.

The day-to-day aspirations of people with learning disabilities mirror those of many of us in society. The barriers to achieving what are often simple goals are, however, much greater than the norm for individuals with a learning disability. Working alongside their partners, citizen advocates have been involved in enabling individuals to tackle the following: HMRC tax issues, divorce, quotes for repairs, attending gardening and cooking projects, medical appointments, drug and alcohol support, end of life wishes, dealing with grief, to name but a few.

The issues faced by people with learning disabilities on a daily basis remain constant no matter how society changes around them. These include being isolated within one's own community, having appropriate accommodation, financial insecurity, feeling safe from exploitation, medical concerns, family upheaval and the breakdown of relationships.

It is not possible to provide services that will address these concerns for all people with learning disabilities. By identifying individuals who are at risk of one or other of the above-mentioned issues, it might be possible to recruit a member of the community to stand alongside that individual to offer the help and support needed specifically for that person to negotiate some of the obstacles in their life. The strength of a citizen advocacy partnership is that the first allegiance of the citizen advocate is to their partner, the person with a learning disability.



# Chairpersons Report

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It is inevitable that Person to Person has a waiting list of people, eagerly awaiting the support and companionship that Citizen Advocacy offers. We are continuously seeking volunteers who might be interested in making a meaningful difference by becoming a Citizen Advocate at Person to Person.

The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long-term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

It's been great to see so many of our partnerships attending our events this year. Their participation underscores the value of our work and helps strengthen our community connections. We appreciate their engagement and the positive impact it brings to our gatherings.

I would like to express my thanks to the members of the Management Committee for their commitment over the year, our Office Manager, Kate Fussell and to Jackie Hughes, Citizen Advocacy Co-ordinator.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

# Citizen Advocacy Report



*Jackie Hughes*

As we look back on the past year, I want to extend my sincere thanks to everyone who has supported Person to Person. In particular, our heartfelt appreciation goes to our dedicated volunteers. Their time, care, and commitment continue to enrich the lives of adults with learning disabilities across the Caerphilly Borough.

Our Citizen Advocacy project remains central to our mission. Built on one-to-one partnerships between volunteer advocates and adults with learning disabilities, these relationships—grounded in trust, respect, and equality—offer vital support and empowerment to individuals who may otherwise struggle to have their voices heard.

Citizen Advocates help their partners express their views, make informed decisions, and take greater control of their lives. Through active listening, encouragement, and standing alongside their partners, they foster confidence and self-determination. Advocates also assist with accessing essential services, from health and wellbeing to housing and social care, enabling fuller participation in community life and promoting independence and inclusion.

# Citizen Advocacy Report



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We are proud to have 28 active Citizen Advocacy partnerships, each unique but united by a shared commitment to fairness, inclusion, and friendship. Our volunteers are the backbone of this work, and we are deeply grateful for their contributions.

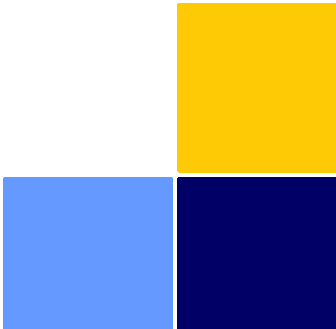
This year, it has been wonderful to see so many partnerships engaging in our social events, strengthening community bonds and celebrating the value of connection.

Yet, there is still more to do. Seventeen individuals are currently waiting to be matched with a Citizen Advocate. We are actively seeking new volunteers—if you or someone you know is interested in making a meaningful difference, please get in touch.

Special thanks to our office manager, Kate, for keeping everything running smoothly, and to our Management Committee for their ongoing support. We are also grateful to Caerphilly County Borough Council for their continued funding.

To our volunteers, partners, supporters, and friends—thank you. Your generosity and commitment make a lasting impact every day. Here's to another year of advocacy, inclusion, and positive change.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.



# Partnership Stories

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## *Shirley*

Shirley, a woman in her 80s, who is reliant on her wheelchair, lives in a large care home in the borough, where she has lived for many years. On a recent visit from her advocate Jill, they were discussing the summer and all that it brings, Jill asked Shirley about past holiday she had been on. Shirley said she couldn't remember but would like to go on one.

Jill spoke to the care team about the possibility of Shirley going on a holiday. Shirley would need 2 members of staff to support her. Accommodation and transport would need to be suitable to meet Shirley's needs.

Enquiries were made with the Finance team at Caerphilly to check that Shirley had enough money to go on holiday. The advocate spoke to Shirley's social worker who thought it was a good idea for her to take a holiday if that was what she wanted and if she had sufficient funds.

Shirley said she would like to go to the seaside and that she wanted to go somewhere that had lots of shops to visit. Somewhere with entertainment as she loved to listen to live music.

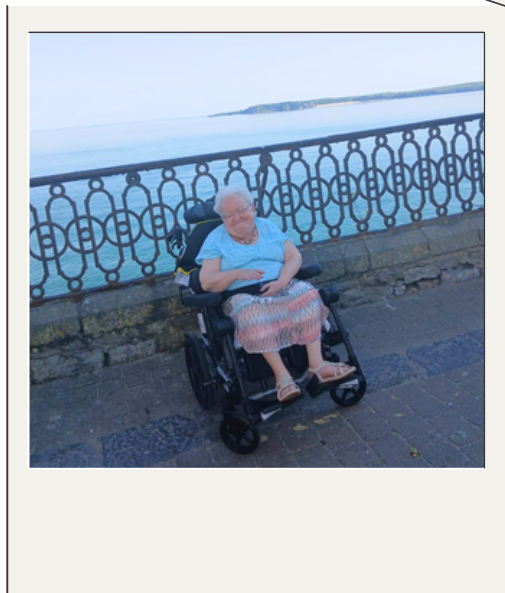
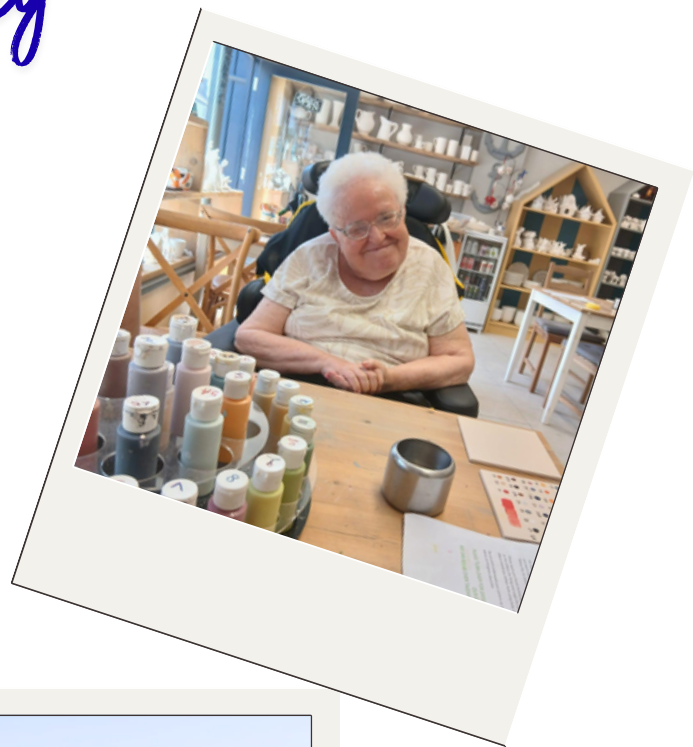
Shirley chose a holiday in Tenby. There was a bungalow on the beach and a clubhouse nearby providing live music every evening. Two staff were to support Shirley on her trip.

The holiday was a huge success with Shirley telling her advocate all about it. Tenby was fabulous, the weather was good. The shops were great with Shirley enjoying the shopping. She enjoyed looking out at the sea and sang along at the clubhouse where people made a huge fuss of her.

The holiday was a huge success, creating fantastic memories for Shirley.

# Partnership Stories

*Shirley*



# Partnership Stories

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## *Pat & Susan*

Pat was living in her own flat in the Caerphilly Borough and had become very isolated. She used to be able to catch her local bus and go and meet with friends. However, Pat had lost her confidence and was no longer able access her community. She used to attend a day centre, but the centre had closed during Covid and there were no plans for it to re-open. Pat had also moved home as the flat she lived in was part of a complex that had been condemned and was due to be pulled down.

Pat only ever left her home when her father collected her to visit her Mum who was very poorly and living in a local nursing home.

Pat had been receiving a few hours support per week, helping her to live independently, but this was being withdrawn as it was only ever a temporary service. On top of this Pat 's mums health was deteriorating.

Following a visit from the coordinator, Pat said she would like to have a citizen advocate. The coordinator began canvassing Pats local area, displaying leaflets in cafes, shops etc., basically anywhere where possible volunteers could be reached. The postmistress in the cafe/post office said that she would give leaflets to people she thought may be interested in volunteering. From this networking Susan came forward as a volunteer. Following her induction, she was introduced to Pat. Initially they would go to the local cafe, this was getting Pat back out into her community. But then the cafe closed. Soon after Pat's mum passed away, all in a short period of time. Pat was devastated and over the next 6 months became very depressed. Susan became very concerned, visiting Pat as often as she could. Dad had also stopped visiting Pat now as he wasn't well and was having problems with his own mobility.

# Partnership Stories

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Six months on and Pat was very lonely, saying how boring life was, “every day is the same”, and how much she missed Mum. Susan worked closely with Pat identifying various activities in the community for Pat to attend, but Pat didn't want to go on her own. Susan spoke to the co-ordinator who told her of 2 activities she thought may be suitable for Pat, cookery and music, run by the local People 1st group. Susan suggested to Pat she should give it a go. Pat was very reluctant and kept making excuses to not go.

However, Pat did agree to attend a Person to Person coffee morning with her advocate and said she would think about the other social activities. At the coffee morning she was introduced to Julie and they got on really well. Julie told Pat that she attended the cookery and music classes and offered to sit with Pat if she wanted to attend. After some persuasion Pat agreed to give it a go.

The advocate spoke to the Coordinator at People First explaining Pat's anxieties. A taxi was booked and the first visit to cookery took place. It was a success! Pat attended, there were tears and mixed emotions, but she did enjoy herself and said she would like to go again. Arrangements were made the following week, for her to attend the music session. This was also a success and went well.

Three months on Pat is still attending both activities. Sometimes she is tearful but not as much as she was, she sits with Julie and other people, slowly making friends. She continues to travel using the local taxi firm but has indicated that maybe next summer she would have a go at catching the local bus again.

Susan said Pat and Julie are arranging to meet up to go for a coffee in Blackwood. Pat has also asked when the next social event with Person to Person will be held as she would like to attend!!

# Partnership Stories

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## *John & Robert*

Robert a long-term volunteer with Person to Person Citizen Advocacy recently took his partner John, who loves old time music, on a trip out into the community. The partnership attended the Golden oldies singalong session at Ystrad Mynach library, where they sang along with other members of the community to tunes from years gone by.

Following the music session, they headed off to Islwyn park Coffee Shop where John had once attended a day center that had previously been of the site. John had a wonderful time talking to other people in the cafe that he remembered from the centre. Reminiscing about the past, seeing many faces he hadn't seen in years.

Robert asked John if he had ever watched the movie "Titanic"? John had and said it was one of his favourite films. Robert explained that there is a plaque on Gelligroes Mill about a man named Artie Moore who had received the distress radio message from the sinking ship Titanic in April 1912. Robert explained to John that it was a mile down the road and asked if he would like to go and see it. John was very keen to do so and off they went.

After a very full afternoon they returned to John's home, where they enjoyed a cup of coffee with John telling his staff all about his day.

# Financial Report



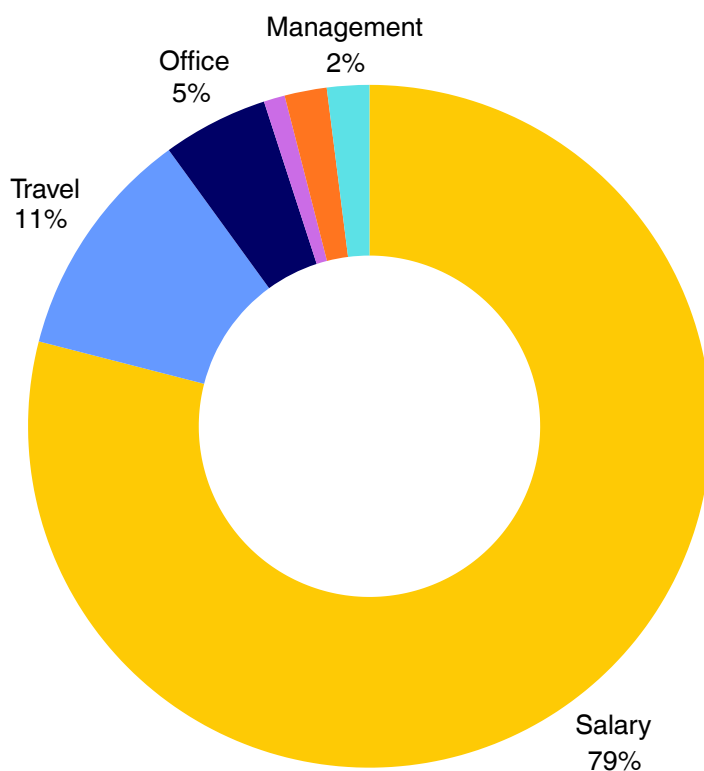
*Will Thomas*

## Money in

Caerphilly cbc	40,500
<b>Total income</b>	<b>40,500</b>

## Money out

Salary including pension	30,507
Travel and training	4,449
Office costs	1,804
Rent	264
Professional fees	732
Management costs	610
<b>Total expenses</b>	<b>38,366</b>



# Our Committee

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**Alun Thomas**  
Chairperson



**Will Thomas**  
Treasurer



**Lynne Gornicki**  
Secretary



**Linda Davies**  
Trustee



**Marc Evans**  
Trustee

# Contact Us

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**07436 102162**



**[www.persontoperson.org.uk](http://www.persontoperson.org.uk)**



**[advocacy@persontoperson.org.uk](mailto:advocacy@persontoperson.org.uk)**

**M** MACE

**A** AND

**P** PARTNERS

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CHARTERED ACCOUNTANTS

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**Registered Charity Number**

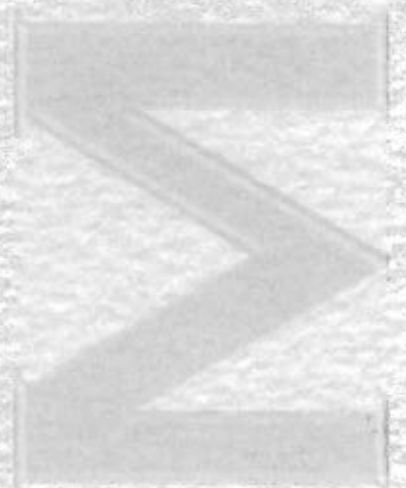
1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2025**



## PERSON TO PERSON CITIZEN ADVOCACY

### TRUSTEES

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies  
Mark Evans

### ADDRESS

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

### REGISTERED CHARITY NUMBER

1185625

### ACCOUNTANTS

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

### BANKERS

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

## ACCOUNTS – 31<sup>ST</sup> MARCH 2025

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4 Statement of Financial Activities  
5 Balance Sheet  
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PERSON TO PERSON CITIZEN ADVOCACY

TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2025

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2025.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	
Mark Evans	

STRUCTURE, GOVERNANCE AND MANAGEMENT

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

**Objects, Organisation and Activities**

The Charity is established to promote the relief of people with a learning disability within the boundaries of the former Mid Glamorgan and to assist those people to realise their full potential to lead fulfilling lives by the provision of a service calculated to:-

- i. assist persons as defined above to obtain their full rights and privileges as a citizen:
- ii. provide long term friendship and support:
- iii. provide information to people with a learning disability.

Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

## **Review of Progress and Achievements**

I am pleased to share a review of yet another year during which Person to Person Citizen Advocacy has continued to play an integral role in the lives of many people with learning disabilities living in the County Borough of Caerphilly.

Person to Person was established in 1995 so that in May 2025, there will have been a citizen advocacy presence in Caerphilly County Borough for 30 years.

The success of Person to Person relies on individuals within the community being prepared to give their time freely to stand alongside a person with a learning disability. It is at this moment that citizen advocacy partnerships are formed.

Throughout the year the Citizen Advocacy Co-ordinator has been supporting, on average, 27 partnerships. The majority of these are long-term partnerships which is the essence of successful citizen advocacy. Partnerships do, on occasion, come to an end. This may be, for example, as a result of individuals moving out of the area or the sad death of a partner. The

Co-ordinator is aware of other people who would benefit from having a citizen advocate and the recruitment and matching of potential citizen advocates is an ongoing aspect of the work.

A key aspect of the Co-ordinator's role is to offer support and advice to the citizen advocates as they address the issues that are pertinent to their partnerships. Through the recruitment and matching process carried out by the Co-ordinator, another 27 people are in a position to provide friendship and practical help on a one-to-one basis to an individual with a learning disability.

The day-to-day aspirations of people with learning disabilities mirror those of many of us in society. The barriers to achieving what are often fairly simple goals are, however, much greater than the norm for individuals with a learning disability. Working alongside their partners, citizen advocates have been involved in enabling individuals to tackle the following: HMRC tax issues, divorce, quotes for repairs, attending gardening and cooking projects, medical appointments, drug and alcohol support, end of life wishes, dealing with grief, to name but a few.

The issues faced by people with learning disabilities on a daily basis remain constant no matter how society changes around them. These may include being isolated within one's own community, having appropriate accommodation, financial insecurity, feeling safe from exploitation, medical concerns,

**PAGE 1 cont.**

It is not possible to provide services that will address these issues for all people with learning disabilities. By identifying individuals who are at risk of one or other of the above-mentioned issues, it might be possible to recruit a member of the community to stand alongside that individual to offer the help and support needed specifically for that person to negotiate some of the obstacles in their life. The strength of a citizen advocacy partnership is that the first allegiance of the citizen advocate is to their partner, the person with a learning disability.

The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long-term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

**Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £12978 with £19197 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

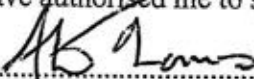
**Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.

  
.....

Alun Thomas (Chair)

Dated : 01/09/2025

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2025, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## INDEPENDENT EXAMINER'S STATEMENT

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
Chartered Accountant  
Mace and Partners  
52 Talbot Green  
Pontyclun  
Rhondda Cynon Taff  
CF72 8AF

Date: 1st September 2025

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2025**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2025</u> <u>Total</u>	<u>2024</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	-	40500	40500	40500
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	645	29862	30507	31127
Travelling Expenses		-	3514	3514	3160
Training Expenses	4	-	935	935	280
Premises Expenses	5	264	-	264	191
Office Expenses	6	1411	393	1804	1638
Independent Examiners Fees		732	-	732	732
Assets Written Off		-	-	-	798
AGM		610	-	610	-
<b><u>TOTAL EXPENDITURE</u></b>		3662	34704	38366	37926
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		(3662)	5796	2134	2574
Fund balance brought forward		16640	13401	30041	27467
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		12978	19197	32175	30041

PERSON TO PERSON CITIZEN ADVOCACY

BALANCE SHEET AS AT 31ST MARCH 2025

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2025</u>	<u>2024</u>
<b><u>CURRENT ASSETS</u></b>					
Cash at Bank		13735	19465	33200	31218
Cash in Hand		<u>95</u>	<u>-</u>	<u>95</u>	<u>95</u>
		13830	19465	33295	31313
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	7	<u>852</u>	<u>268</u>	<u>1120</u>	<u>1272</u>
<b><u>NET CURRENT ASSETS</u></b>					
		<u>12978</u>	<u>19197</u>	<u>32175</u>	<u>30041</u>
<b><u>NET ASSETS</u></b>					
		<u>12978</u>	<u>19197</u>	<u>32175</u>	<u>30041</u>

Represented By:-

**FUNDS**

<b><u>Accumulated Fund Account</u></b>	12978	19197	32175	30041
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Trustee..... *M. B. Thomas* .....

Trustee..... *M. L. Gornicki* .....

For and on behalf of the Managing Committee  
Dated 1st September 2025

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2025

1. PRINCIPAL ACCOUNTING POLICIES

a) Accounting Convention

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) Incoming resources

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) Resources expended and basis of allocation of costs

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) Capitalisation and depreciation of tangible fixed assets

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) Funds accounting

Funds held by the charity are:-

Unrestricted general funds

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

Restricted funds

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

f) Operating leases

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2025  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2025</u></b>	<b><u>2024</u></b>
	Caerphilly C.B.C.	40500	40500
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	30507	31127
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (1 in 2024)		
	No employees received remuneration amounting to more then £50,000 in either year.		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	935	280

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2025  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2025</u></b>	<b><u>2024</u></b>
	Rent	120	120
	Insurance	<u>144</u>	<u>71</u>
		<u>264</u>	<u>191</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	825	578
	Telephone	86	118
	Sundry Expenses	93	458
	Computer Expenses	500	484
	Disclosure Services	131	-
	Repairs & Renewals	<u>169</u>	<u>-</u>
		<u>1804</u>	<u>1638</u>
7.	<b><u>CREDITORS</u></b>	<b><u>2025</u></b>	<b><u>2024</u></b>
	Travelling	268	380
	Independent Examiners Fee	732	732
	Premises Expenses	120	120
	Office Expenses	<u>-</u>	<u>40</u>
		<u>1120</u>	<u>1272</u>

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2025  
(CONTINUED)

8. FUNDS

Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.

Restricted funds are funds which have been given for particular purposes and projects.

9. TRANSACTIONS WITH RELATED PARTIES

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2024 NIL)

**M** MACE

**A** AND

**P** PARTNERS

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CHARTERED ACCOUNTANTS

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**Registered Charity Number**

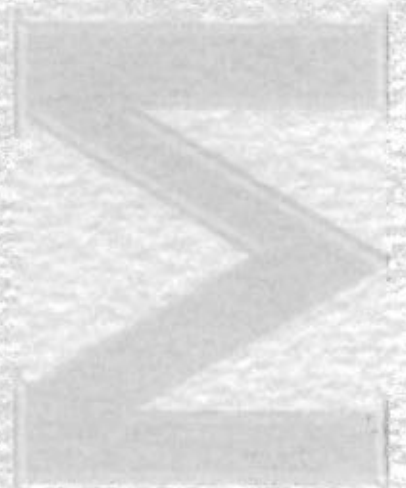
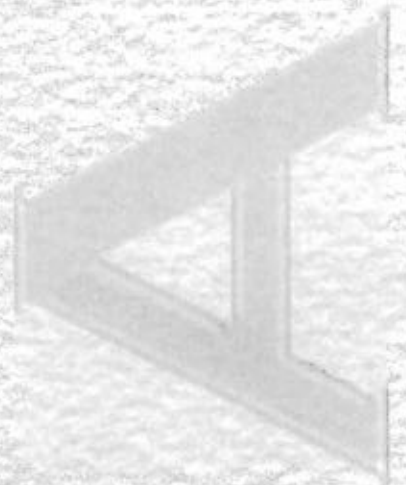
1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2025**



## PERSON TO PERSON CITIZEN ADVOCACY

### TRUSTEES

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies  
Mark Evans

### ADDRESS

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

### REGISTERED CHARITY NUMBER

1185625

### ACCOUNTANTS

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

### BANKERS

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

## ACCOUNTS – 31<sup>ST</sup> MARCH 2025

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4 Statement of Financial Activities  
5 Balance Sheet  
6 – 9 Notes to the Accounts

PERSON TO PERSON CITIZEN ADVOCACY

TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2025

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2025.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	
Mark Evans	

STRUCTURE, GOVERNANCE AND MANAGEMENT

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

**Objects, Organisation and Activities**

The Charity is established to promote the relief of people with a learning disability within the boundaries of the former Mid Glamorgan and to assist those people to realise their full potential to lead fulfilling lives by the provision of a service calculated to:-

- i. assist persons as defined above to obtain their full rights and privileges as a citizen:
- ii. provide long term friendship and support:
- iii. provide information to people with a learning disability.

Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

## **Review of Progress and Achievements**

I am pleased to share a review of yet another year during which Person to Person Citizen Advocacy has continued to play an integral role in the lives of many people with learning disabilities living in the County Borough of Caerphilly.

Person to Person was established in 1995 so that in May 2025, there will have been a citizen advocacy presence in Caerphilly County Borough for 30 years.

The success of Person to Person relies on individuals within the community being prepared to give their time freely to stand alongside a person with a learning disability. It is at this moment that citizen advocacy partnerships are formed.

Throughout the year the Citizen Advocacy Co-ordinator has been supporting, on average, 27 partnerships. The majority of these are long-term partnerships which is the essence of successful citizen advocacy. Partnerships do, on occasion, come to an end. This may be, for example, as a result of individuals moving out of the area or the sad death of a partner. The

Co-ordinator is aware of other people who would benefit from having a citizen advocate and the recruitment and matching of potential citizen advocates is an ongoing aspect of the work.

A key aspect of the Co-ordinator's role is to offer support and advice to the citizen advocates as they address the issues that are pertinent to their partnerships. Through the recruitment and matching process carried out by the Co-ordinator, another 27 people are in a position to provide friendship and practical help on a one-to-one basis to an individual with a learning disability.

The day-to-day aspirations of people with learning disabilities mirror those of many of us in society. The barriers to achieving what are often fairly simple goals are, however, much greater than the norm for individuals with a learning disability. Working alongside their partners, citizen advocates have been involved in enabling individuals to tackle the following: HMRC tax issues, divorce, quotes for repairs, attending gardening and cooking projects, medical appointments, drug and alcohol support, end of life wishes, dealing with grief, to name but a few.

The issues faced by people with learning disabilities on a daily basis remain constant no matter how society changes around them. These may include being isolated within one's own community, having appropriate accommodation, financial insecurity, feeling safe from exploitation, medical concerns,

**PAGE 1 cont.**

It is not possible to provide services that will address these issues for all people with learning disabilities. By identifying individuals who are at risk of one or other of the above-mentioned issues, it might be possible to recruit a member of the community to stand alongside that individual to offer the help and support needed specifically for that person to negotiate some of the obstacles in their life. The strength of a citizen advocacy partnership is that the first allegiance of the citizen advocate is to their partner, the person with a learning disability.

The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long-term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

**Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £12978 with £19197 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

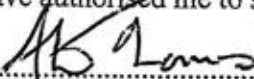
**Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.

  
.....

Alun Thomas (Chair)

Dated : 01/09/2025

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2025, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## INDEPENDENT EXAMINER'S STATEMENT

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
Chartered Accountant  
Mace and Partners  
52 Talbot Green  
Pontyclun  
Rhondda Cynon Taff  
CF72 8AF

Date: 1st September 2025

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2025**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2025</u> <u>Total</u>	<u>2024</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	-	40500	40500	40500
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	645	29862	30507	31127
Travelling Expenses		-	3514	3514	3160
Training Expenses	4	-	935	935	280
Premises Expenses	5	264	-	264	191
Office Expenses	6	1411	393	1804	1638
Independent Examiners Fees		732	-	732	732
Assets Written Off		-	-	-	798
AGM		610	-	610	-
<b><u>TOTAL EXPENDITURE</u></b>		3662	34704	38366	37926
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		(3662)	5796	2134	2574
Fund balance brought forward		16640	13401	30041	27467
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		12978	19197	32175	30041

PERSON TO PERSON CITIZEN ADVOCACY

BALANCE SHEET AS AT 31ST MARCH 2025

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2025</u>	<u>2024</u>
<b><u>CURRENT ASSETS</u></b>					
Cash at Bank		13735	19465	33200	31218
Cash in Hand		<u>95</u>	<u>-</u>	<u>95</u>	<u>95</u>
		13830	19465	33295	31313
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	7	<u>852</u>	<u>268</u>	<u>1120</u>	<u>1272</u>
<b><u>NET CURRENT ASSETS</u></b>					
		<u>12978</u>	<u>19197</u>	<u>32175</u>	<u>30041</u>
<b><u>NET ASSETS</u></b>					
		<u>12978</u>	<u>19197</u>	<u>32175</u>	<u>30041</u>

Represented By:-

**FUNDS**

<b><u>Accumulated Fund Account</u></b>	12978	19197	32175	30041
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Trustee..... *M. B. Thomas* .....

Trustee..... *M. L. Gornicki* .....

For and on behalf of the Managing Committee  
Dated 1st September 2025

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2025

1. PRINCIPAL ACCOUNTING POLICIES

a) Accounting Convention

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) Incoming resources

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) Resources expended and basis of allocation of costs

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) Capitalisation and depreciation of tangible fixed assets

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) Funds accounting

Funds held by the charity are:-

Unrestricted general funds

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

Restricted funds

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

f) Operating leases

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2025  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2025</u></b>	<b><u>2024</u></b>
	Caerphilly C.B.C.	40500	40500
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	30507	31127
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (1 in 2024)		
	No employees received remuneration amounting to more then £50,000 in either year.		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	935	280

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2025  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2025</u></b>	<b><u>2024</u></b>
	Rent	120	120
	Insurance	<u>144</u>	<u>71</u>
		<u>264</u>	<u>191</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	825	578
	Telephone	86	118
	Sundry Expenses	93	458
	Computer Expenses	500	484
	Disclosure Services	131	-
	Repairs & Renewals	<u>169</u>	<u>-</u>
		<u>1804</u>	<u>1638</u>
7.	<b><u>CREDITORS</u></b>	<b><u>2025</u></b>	<b><u>2024</u></b>
	Travelling	268	380
	Independent Examiners Fee	732	732
	Premises Expenses	120	120
	Office Expenses	<u>-</u>	<u>40</u>
		<u>1120</u>	<u>1272</u>

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2025  
(CONTINUED)

8. FUNDS

Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.

Restricted funds are funds which have been given for particular purposes and projects.

9. TRANSACTIONS WITH RELATED PARTIES

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2024 NIL)

**PERSON TO PERSON CITIZEN ADVOCACY**

England & Wales - Charity number 1185625

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# Accounts

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**Person to Person**  
**Citizen Advocacy**

# **ANNUAL REPORT 2024**

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**06 Citizen Advocacy project report**



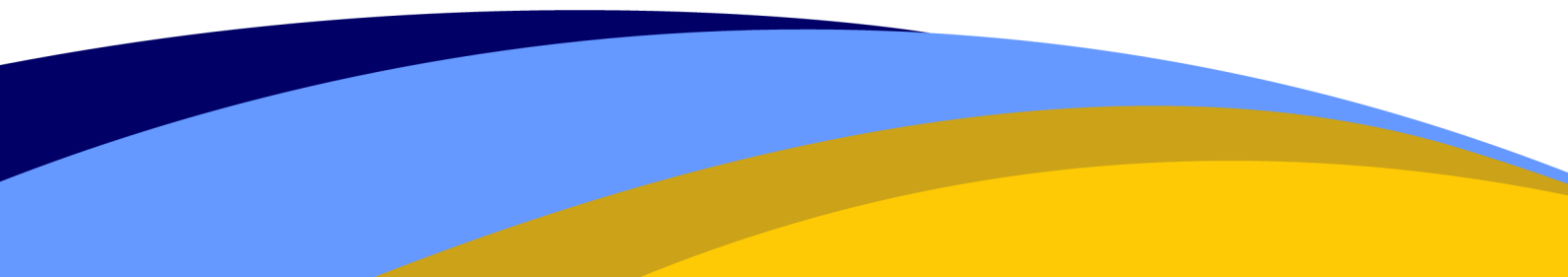
**08 Partnership stories**



**11 Financial report**



**12 Acknowledgements**



# CHAIRPERSON'S REPORT



I am pleased to be able to report on another year during which Person to Person Citizen Advocacy has continued to play an integral role in the lives of many people with learning disabilities living in the County Borough of Caerphilly.

The success of Person to Person relies on individuals within the community being prepared to give their time freely to stand alongside a person with a learning disability. It is at this moment that citizen advocacy partnerships are formed.

Over the years there have been changes in central and local government, changes in personnel, changes in the provision of services provided by statutory bodies, voluntary sector organisations and private business. The impact of all these changes has probably had an effect on most people, for better or worse. The way people access help and support, with less emphasis on face-to-face meetings in favour of digital communication, has been revolutionary in the way we live our lives.

However, what has remained constant are day to day issues faced by many people with learning disabilities.

# CHAIRPERSON'S REPORT



These may include being isolated within one's own community, having appropriate accommodation, financial insecurity, feeling safe from exploitation, medical concerns, to name but a few. It is not possible to provide services that will address these issues for all people with learning disabilities.

By identifying individuals who are at risk of one or other of the above-mentioned issues, Person to Person will endeavour to recruit a member of the community to stand alongside that individual to offer the help and support needed specifically to negotiate some of the obstacles in their life. The strength of a citizen advocacy partnership is that the first allegiance of the citizen advocate is to their partner, the person with a learning disability.

The Management Committee is grateful to Caerphilly County Borough Council for the funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability.

When an individual is identified and indicates to the Advocacy Coordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

# CHAIRPERSON'S REPORT



Funding received from Caerphilly County Borough Council has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty. At the end of the financial year Person to Person was supporting 27 partnerships.

I would like to thank the other members of the management committee for their contribution over the past year. The contribution of Jackie Hughes, Citizen Advocacy Coordinator, and Kate Fussell, Admin support cannot be underestimated and I commend them for their work.

Through our Citizen Advocacy Coordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

*Alun Thomas*



# CITIZEN ADVOCACY PROJECT



I would like to extend my heartfelt gratitude to everyone who has been involved with Person to Person over the past year. A special thanks goes to our dedicated citizen advocates, who generously give their time and effort to enhance the lives of individuals with learning disabilities. Their unwavering commitment is truly inspiring.

Citizen Advocacy involves a meaningful one-on-one relationship between a citizen advocate (volunteer) and a partner (an adult with a learning disability). This relationship is built on a foundation of mutual respect and equal friendship, with a focus on long-term support.

A Citizen Advocate plays a crucial role in trying to ensure that their partner's views, wishes, choices, and feelings are heard and respected in all decision-making processes. By actively listening and providing support, citizen advocates endeavour to give their partners the confidence to make informed decisions about their own lives.

In addition, citizen advocates guide their partners to the appropriate resources and information, helping them navigate various services and support systems. This guidance ensures that individuals are making choices that are important to them. Through this support, individuals are more able to be part of their community and enjoy the rich opportunities it offers, fostering a greater sense of belonging and participation.

# CITIZEN ADVOCACY PROJECT



It is inevitable that Person to Person has a waiting list of people, eagerly awaiting the support and companionship that Citizen Advocacy offers. We are continuously seeking volunteers who might be interested in making a meaningful difference by becoming a Citizen Advocate at Person to Person.

It's been great to see so many of our partnerships attending our events this year. Their participation underscores the value of our work and helps strengthen our community connections. We appreciate their engagement and the positive impact it brings to our gatherings.

Person to Person was supporting 27 dedicated partnerships in the Caerphilly Borough at the end of the financial year. The selfless contributions and unwavering commitment of our citizen advocates are key to the success of Person to Person. Their efforts not only make a significant impact on the lives of those they support but also enrich our entire community. Thank you for your continued dedication and for making a positive difference every day.

My thanks to Kate our office manager, the Management committee, and CCBC for the funding for our project.

*Jackie Hughes*



# PARTNERSHIP STORY

## Adrian & Alan

Adrian and myself met in May 2015. Jackie thought we would be a good match as we both enjoyed walking and gardening. Sadly I do not share Adrian's passion for Elvis but we have attended an Elvis concert, film and Adrian had Elvis attend his 50th birthday party!

We have become friends and walked most of the local area, worked in Adrian's garden and been to most coffee shops and pubs in the area.

Most times have been good, but sadly Adrian's Mum died in 2018 and he was understandably very upset.

In 2023 we joined an allotment project at Ynys Hywel Farm and have attended most weeks, weather permitting – we have been called “The Fair-Weather Gardeners”. Adrian and myself have planted and harvested more types of vegetables than we even knew existed. We have learnt about moths, bees, sheep and chickens whilst at the farm. More importantly we have made some very good friends whilst working at the allotment.



# PARTNERSHIP STORY



## **Kay & Margaret**

During my time as Margaret's Advocate, we have shared a good rapport, I was aware that she trusted me and regarded me as a friend and has been able to share any concerns that she has had.

I have helped Margaret with a few matters arising which would have proved extremely difficult for her to manage. I have also been there when she has needed a lift for appointments, such as medical check-ups and scans. I have supported her with applying for her bus pass, making appointments and helping her to understand letters etc.

Having come to know her interests, I have taken Margaret to various social events including train trips to Penarth which she thoroughly enjoyed; going to see a choir performance which she loved and still talks about, going out for lunches, trips in the car. She also enjoyed visiting the Winding House museum in New Tredegar. Last Christmas, we both went to Merthyr with Pontlottyn Church where we attend coffee mornings for their Christmas outing, We also went along to the Person To Person Christmas coffee morning which included a guided tour of Llanciach Fawr Manor. If I have not been able to see Margaret for a while, I drop her a phone call as I know she really appreciates this.

## **Margaret:**

I like Kay being my advocate, we are good friends. She has helped me with lots of things and has been there when I have needed a friend. We've been on some lovely trips to lots of places. I really like her!.

# PARTNERSHIP STORY



## Samantha & Rob

I am Samantha, and I have been an Advocate with Person to Person for over 15 years. Recently, I worked with a woman for a short time. Together with her caregivers, we found a better way for her to communicate since she was not very verbal. During one visit, which happened to be another resident's birthday, she was able to say a few words. We created a book for her to choose her meals, drinks, and favourite activities each day, which helped her feel more involved.

I also had the pleasure of meeting Rob, who was a kind man but a bit shy around new people. We often met at the library café for cake and enjoyed several outings for lunch and movies together. When a new care group took over his care home, they didn't have much information about what he liked to do before the pandemic. The new manager was very friendly, and we held several meetings to discuss Rob's preferences, which she worked hard to cater for.

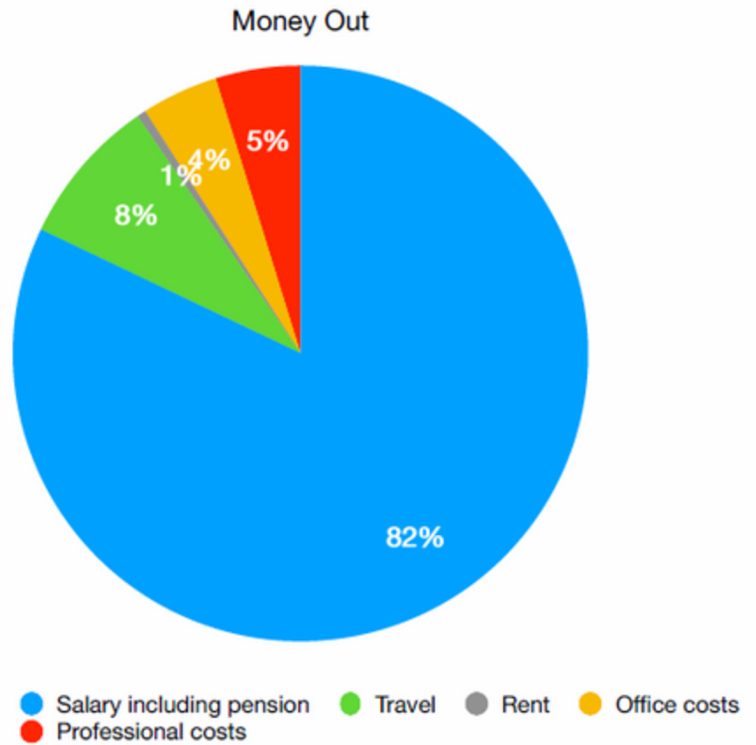
Last year, I learned that Rob was unwell and needed tests, but there were difficulties in getting those done. I reached out to one of his doctors, which helped start the process. Unfortunately, it was too late, and we lost Rob. In honor of his love for collecting weeds, I made a bouquet of weeds for his funeral, which was placed on his coffin as we said goodbye. It was a very sad ending for such a wonderful man.

# FINANCIAL REPORT



Money In	
Caerphilly CBC	£40,500
<b>Total income</b>	<b>£40,500</b>

Money Out	
Salary including pension	£31,127
Travel	£3,160
Rent	£191
Office costs	£1,638
Professional costs	£1,810
<b>Total expenses</b>	<b>£37,926</b>



*Will Thomas*

# ACKNOWLEDGEMENTS

## Management Committee members



**Alun Thomas**  
*Chairman*



**Will Thomas**  
*Treasurer*



**Lynne Gornicki**  
*Secretary*



**Linda Davies**  
*Trustee*

## Funders



**M** MACE

**A** AND

**P** PARTNERS

---

CHARTERED ACCOUNTANTS

---

**Registered Charity Number**

1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2024**



**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

1185625

**ACCOUNTANTS**

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

**BANKERS**

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

**ACCOUNTS – 31<sup>ST</sup> MARCH 2024**

**PAGES**

1 - 2 Trustees Report  
3 Independent Examiners Report  
4 Statement of Financial Activities  
5 Balance Sheet  
6 - 9 Notes to the Accounts

## **PERSON TO PERSON CITIZEN ADVOCACY**

### **TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2024**

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2024.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	

### **STRUCTURE, GOVERNANCE AND MANAGEMENT**

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

#### **Objects, Organisation and Activities**

The Charity is established to promote the relief of people with a learning disability within the boundaries of the former Mid Glamorgan and to assist those people to realise their full potential to lead fulfilling lives by the provision of a service calculated to:-

- i. assist persons as defined above to obtain their full rights and privileges as a citizen;
- ii. provide long term friendship and support;
- iii. provide information to people with a learning disability.

Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

**Review of Progress and Achievements**

I am pleased to share a review of another year during which Person to Person Citizen Advocacy has continued to play an integral role in the lives of many people with learning disabilities living in the County Borough of Caerphilly.

The success of Person to Person relies on individuals within the community being prepared to give their time freely to stand alongside a person with a learning disability. It is at this moment that citizen advocacy partnerships are formed.

Over the years there have been changes in central and local government, changes in personnel, changes in the provision of services provided by statutory bodies, voluntary sector organisations and private business. The impact of all these changes has probably had an impact on most people, for better or worse. The way people access help and support, with less emphasis on face-to-face meetings in favour of digital communication, has been revolutionary in the way we live our lives.

However, what has remained constant are day to day issues faced by many people with learning disabilities. These may include being isolated within one's own community, having appropriate accommodation, financial insecurity, feeling safe from exploitation, medical concerns, to name but a few. It is not possible to provide services that will address these issues for all people with learning disabilities. By identifying individuals who are at risk of one or other of the above-mentioned issues, it might be possible to recruit a member of the community to stand alongside that individual to offer the help and support needed specifically for that person to negotiate some of the obstacles in their life. The strength of a citizen advocacy partnership is that the first allegiance of the citizen advocate is to their partner, the person with a learning disability.

At the end of the financial year Person to Person was supporting 27 partnerships.

The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

**Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £16640 with £13401 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

**Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas (Chair)**

**Dated : 25/09/2024**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2024, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

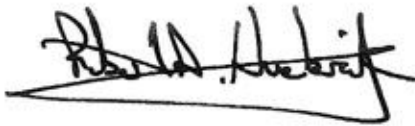
**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## **INDEPENDENT EXAMINER'S STATEMENT**

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
Chartered Accountant  
Mace and Partners  
52 Talbot Green  
Pontyclun  
Rhondda Cynon Taff  
CF72 8AF

Date: 25<sup>th</sup> September 2024

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2024**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2024</u> <u>Total</u>	<u>2023</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	-	40500	40500	40500
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	1245	29882	31127	30903
Travelling Expenses		-	3160	3160	2625
Training Expenses	4	-	280	280	203
Premises Expenses	5	191	-	191	2135
Office Expenses	6	1180	458	1638	1120
Independent Examiners Fees		732	-	732	732
Assets Written Off		586	212	798	111
<b><u>TOTAL EXPENDITURE</u></b>		3934	33992	37926	37829
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		(3934)	6508	2574	2671
Fund balance brought forward		20574	6893	27467	24796
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		16640	13401	30041	27467

PERSON TO PERSON CITIZEN ADVOCACY

BALANCE SHEET AS AT 31ST MARCH 2024

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2024</u>	<u>2023</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	-	-	-	798
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	-	-	-	151
Cash at Bank		17437	13781	31218	27595
Cash in Hand		95	-	95	96
		17532	13781	31313	27842
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	892	380	1272	1173
<b><u>NET CURRENT ASSETS</u></b>					
		16640	13401	30041	26669
<b><u>NET ASSETS</u></b>					
		16640	13401	30041	27467

Represented By:-

FUNDS

<u>Accumulated Fund Account</u>	16640	13401	30041	27467
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Trustee..... *AS Thomas*  
 Trustee..... *M L Gomecki*

For and on behalf of the Managing Committee  
 Dated 25<sup>th</sup> September 2024

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED**  
**31ST MARCH 2024**

1. **PRINCIPAL ACCOUNTING POLICIES**

a) **Accounting Convention**

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) **Incoming resources**

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) **Resources expended and basis of allocation of costs**

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities.

Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) **Capitalisation and depreciation of tangible fixed assets**

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) **Funds accounting**

Funds held by the charity are:-

**Unrestricted general funds**

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

**Restricted funds**

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

f) **Operating leases**

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2024  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Caerphilly C.B.C.	40500	40500
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	31127	30903
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (1 in 2023)		
	No employees received remuneration amounting to more than £50,000 in either year.		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	280	203

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2024  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Rent	120	1290
	Insurance	<u>71</u>	<u>845</u>
		<u>191</u>	<u>2135</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	578	423
	Telephone	118	117
	Sundry Expenses	458	131
	Computer Expenses	<u>484</u>	<u>449</u>
		<u>1638</u>	<u>1120</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2023	20649	
	At 31 <sup>st</sup> March 2024	<u>20649</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2023	19851	
	Charge for the Year	<u>798</u>	
	At 31 <sup>st</sup> March 2024	<u>20649</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2024	-	
	At 31 <sup>st</sup> March 2023	798	
8.	<b><u>CREDITORS</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Travelling	380	311
	Independent Examiners Fee	732	732
	Premises Expenses	120	120
	Office Expenses	<u>40</u>	<u>10</u>
		<u>1272</u>	<u>1173</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2024  
(CONTINUED)

9.	<b><u>DEBTORS</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Prepayments	-	151

10. **FUNDS**

Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.

Restricted funds are funds which have been given for particular purposes and projects.

11. **TRANSACTIONS WITH RELATED PARTIES**

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2023 NIL)

**M** MACE

**A** AND

**P** PARTNERS

---

CHARTERED ACCOUNTANTS

---

**Registered Charity Number**

1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2024**



**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

1185625

**ACCOUNTANTS**

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

**BANKERS**

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

**ACCOUNTS – 31<sup>ST</sup> MARCH 2024**

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3 Independent Examiners Report  
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## **PERSON TO PERSON CITIZEN ADVOCACY**

### **TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2024**

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2024.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	

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Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

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I am pleased to share a review of another year during which Person to Person Citizen Advocacy has continued to play an integral role in the lives of many people with learning disabilities living in the County Borough of Caerphilly.

The success of Person to Person relies on individuals within the community being prepared to give their time freely to stand alongside a person with a learning disability. It is at this moment that citizen advocacy partnerships are formed.

Over the years there have been changes in central and local government, changes in personnel, changes in the provision of services provided by statutory bodies, voluntary sector organisations and private business. The impact of all these changes has probably had an impact on most people, for better or worse. The way people access help and support, with less emphasis on face-to-face meetings in favour of digital communication, has been revolutionary in the way we live our lives.

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The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

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Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

**Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £16640 with £13401 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

**Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas (Chair)**

**Dated : 25/09/2024**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2024, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

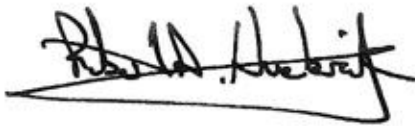
**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## **INDEPENDENT EXAMINER'S STATEMENT**

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
**Chartered Accountant**  
**Mace and Partners**  
**52 Talbot Green**  
**Pontyclun**  
**Rhondda Cynon Taff**  
**CF72 8AF**

**Date: 25<sup>th</sup> September 2024**

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2024**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2024</u> <u>Total</u>	<u>2023</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	-	40500	40500	40500
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	1245	29882	31127	30903
Travelling Expenses		-	3160	3160	2625
Training Expenses	4	-	280	280	203
Premises Expenses	5	191	-	191	2135
Office Expenses	6	1180	458	1638	1120
Independent Examiners Fees		732	-	732	732
Assets Written Off		586	212	798	111
<b><u>TOTAL EXPENDITURE</u></b>		3934	33992	37926	37829
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		(3934)	6508	2574	2671
Fund balance brought forward		20574	6893	27467	24796
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		16640	13401	30041	27467

PERSON TO PERSON CITIZEN ADVOCACY

BALANCE SHEET AS AT 31ST MARCH 2024

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2024</u>	<u>2023</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	-	-	-	798
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	-	-	-	151
Cash at Bank		17437	13781	31218	27595
Cash in Hand		95	-	95	96
		17532	13781	31313	27842
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	892	380	1272	1173
<b><u>NET CURRENT ASSETS</u></b>					
		16640	13401	30041	26669
<b><u>NET ASSETS</u></b>					
		16640	13401	30041	27467

Represented By:-

FUNDS

<u>Accumulated Fund Account</u>	16640	13401	30041	27467
---------------------------------	-------	-------	-------	-------

Trustee..... *AS Thomas*  
 Trustee..... *M L Gomecki*

For and on behalf of the Managing Committee  
 Dated 25<sup>th</sup> September 2024

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED**  
**31ST MARCH 2024**

1. **PRINCIPAL ACCOUNTING POLICIES**

a) **Accounting Convention**

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) **Incoming resources**

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) **Resources expended and basis of allocation of costs**

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities.

Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) **Capitalisation and depreciation of tangible fixed assets**

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) **Funds accounting**

Funds held by the charity are:-

**Unrestricted general funds**

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

**Restricted funds**

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

f) **Operating leases**

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2024  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Caerphilly C.B.C.	40500	40500
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	31127	30903
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (1 in 2023)		
	No employees received remuneration amounting to more than £50,000 in either year.		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	280	203

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2024  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Rent	120	1290
	Insurance	<u>71</u>	<u>845</u>
		<u>191</u>	<u>2135</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	578	423
	Telephone	118	117
	Sundry Expenses	458	131
	Computer Expenses	<u>484</u>	<u>449</u>
		<u>1638</u>	<u>1120</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2023	20649	
	At 31 <sup>st</sup> March 2024	<u>20649</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2023	19851	
	Charge for the Year	<u>798</u>	
	At 31 <sup>st</sup> March 2024	<u>20649</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2024	-	
	At 31 <sup>st</sup> March 2023	798	
8.	<b><u>CREDITORS</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Travelling	380	311
	Independent Examiners Fee	732	732
	Premises Expenses	120	120
	Office Expenses	<u>40</u>	<u>10</u>
		<u>1272</u>	<u>1173</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2024  
(CONTINUED)

9.	<b><u>DEBTORS</u></b>	<b><u>2024</u></b>	<b><u>2023</u></b>
	Prepayments	-	151

10. **FUNDS**

Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.

Restricted funds are funds which have been given for particular purposes and projects.

11. **TRANSACTIONS WITH RELATED PARTIES**

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2023 NIL)

**PERSON TO PERSON CITIZEN ADVOCACY**

England & Wales - Charity number 1185625

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# Accounts

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**Person to Person**  
Citizen Advocacy

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# Annual Report

# 2023

# S T I N Z E T I N Z C O O

03.

Chairpersons Report

05.

Citizen Advocacy Report

07.

Financial Report

08.

Acknowledgements



Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

## ALUN THOMAS

I would like to start by thanking all the citizen advocates for the support they have given to their partners over the last twelve months.

With the year starting with coronavirus regulations still in place in Wales the disruption to the lives of the citizen advocates was, in some cases, quite considerable. That the advocates were still able and prepared to continue doing what they could for their partners shows the value of long-term relationships, freely given.

Coronavirus regulations were lifted on the 31st May 2022. Person to Person continued with the support structures put in to place at the height of the pandemic so as to maximise the contact between citizen advocates and their partners. Whilst the lifting of restrictions with regard to face-to-face contact was welcomed by many, some people were still extremely cautious about coming into direct contact with others, particularly in enclosed spaces. Citizen advocates and their partners were not immune from these concerns and the Citizen Advocacy Co-ordinator was able to support partnerships struggling to come to terms with the inevitable changes to social interaction following the pandemic.

The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful.

Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends. During the year, Person to Person has supported 26 partnerships in the Borough with a wide range of issues, e.g. financial, relationships, access to services, housing and health.

During the year, Caerphilly County Borough Council carried out an exercise during which people with learning disabilities were asked about the future of disability services in the Borough following the disruption caused by the pandemic. Person to Person was funded to support people with learning disabilities to put forward their views.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

Once again the Management Committee is grateful that Caerphilly County Borough Council has recognised the work done over the years by Person to Person in providing help and support to people with learning disabilities in the borough. Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

On behalf of the Management Committee I would like to express our thanks to our Citizen Advocacy Co-ordinator, Jackie Hughes, and to Kate Fussell for providing admin support.

26

*During the year, Person to Person supported 26 citizen advocacy partnerships in the Caerphilly County Borough*



A Citizen Advocate helps their partner in many ways, ensuring people listen to their views, wishes, choices and feelings so that they lead with decision making

## JACKIE HUGHES

It would like to express my thanks to everyone who has been involved with Person to Person over the past year. In particular, our volunteers who continue to give their time freely endeavouring to help improve the lives of people with learning disabilities.

Citizen Advocacy is a one-to-one relationship between an advocate (volunteer) and partner (adult with learning disability). The emphasis is on a long-term relationship based on equal friendship.

A Citizen Advocate helps their partner in many ways ensuring people listen to their views, wishes, choices and feelings so that they lead with decision making.

Advocates help signpost their partners to the right support or information, so that they are making the choices that best suit them. This enables them to be active members of their community, and enjoying all that their community has to offer.

We currently have over 26 volunteers in the Caerphilly Borough. These volunteers give their time freely, demonstrating how selfless and dedicated they are in ensuring our Citizen Advocacy project is a huge success.

Life has slowly returned to the life we knew before the Covid pandemic. However, there have been many changes that we have all had to adapt to. Daytime opportunities have changed with people no longer attending day centres daily. Instead, people are encouraged to utilise the provisions that our communities have to offer. Our advocates have been amazing in the support they have offered partners in identifying and exploring the various groups and activities on offer in the community.

I am truly humbled by the work and dedication of our Citizen Advocates and Management Committee; my huge thanks to you all! I would also like to thank Caerphilly County Borough Council for the on-going funding and believing in the invaluable work of our project.

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## HIGHLIGHTS



Jackie catching up with Julie, Eddie and Malcolm over coffee

Jackie with Margaret, Stephen and John at a coffee morning in Pontlottyn



Christmas get together with everyone at Llancaiach Fawr



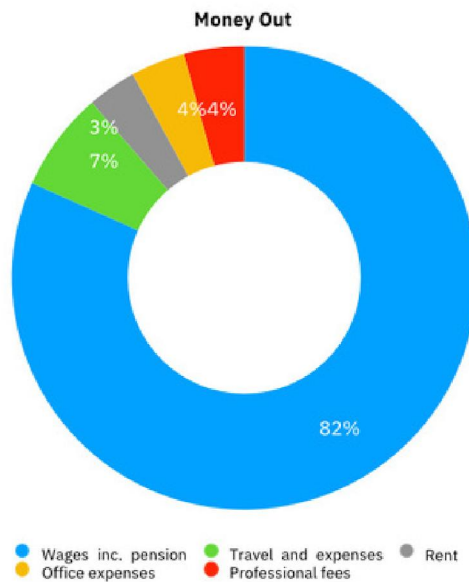
Person to Person endeavours to keep overheads as low as possible so that funds are used to directly influence the lives of individuals for the better. Grateful thanks to Caerphilly CBC for increasing the budget to fully cover costs.

## WILL THOMAS

### How we spent the money

Money In	
Caerphilly cbc	£40,50
<b>Total income</b>	<b>0</b>
	<b>£40,50</b>

Money Out	
Wages inc. pension	£30,903
Travel and expenses	£2,625
Rent	£1,290
Office expenses	£1,434
Professional fees	£1,577
<b>Total expenses</b>	<b>£37,829</b>



# ACKNOWLEDGEMENTS



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*We thank you all for your continued support of our project*

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## CONTACT

Person to Person Citizen Advocacy  
Bargoed YMCA  
Gilfach  
CF81 8JA

[www.persontoperson.org.uk](http://www.persontoperson.org.uk)  
[advocacy@persontoperson.org.uk](mailto:advocacy@persontoperson.org.uk)  
07436 102162

**M** MACE

**A** AND

**P** PARTNERS

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CHARTERED ACCOUNTANTS

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**Registered Charity Number**

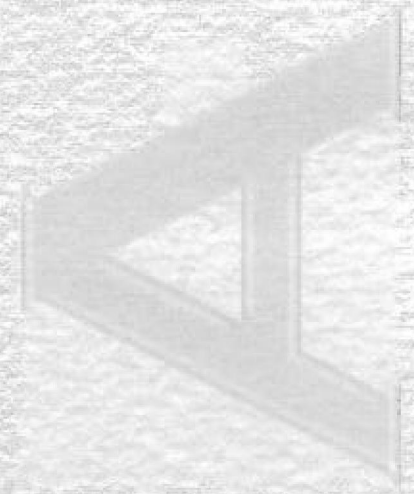
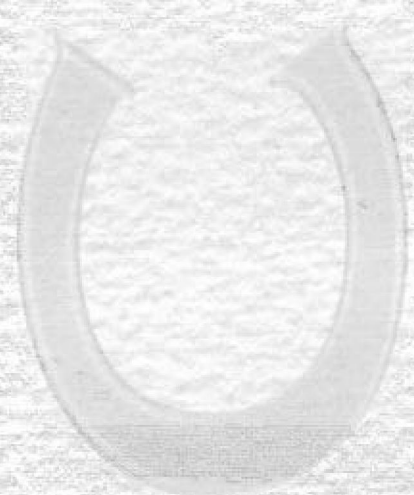
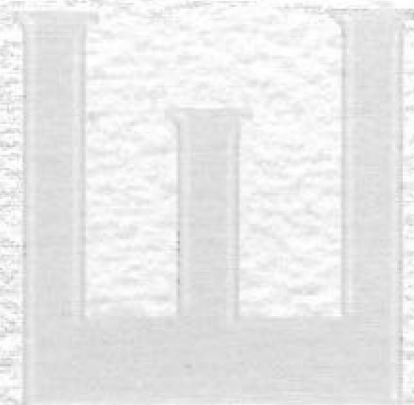
1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2023**



**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

1185625

**ACCOUNTANTS**

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

**BANKERS**

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

**ACCOUNTS – 31<sup>ST</sup> MARCH 2023**

**PAGES**

- 1 - 2 Trustees Report
- 3 Independent Examiners Report
- 4 Statement of Financial Activities
- 5 Balance Sheet
- 6 - 9 Notes to the Accounts

**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2023**

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2023.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

**Objects, Organisation and Activities**

The Charity is established to promote the relief of people with a learning disability within the boundaries of the former Mid Glamorgan and to assist those people to realise their full potential to lead fulfilling lives by the provision of a service calculated to:-

- i. assist persons as defined above to obtain their full rights and privileges as a citizen:
- ii. provide long term friendship and support:
- iii. provide information to people with a learning disability.

Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

**Review of Progress and Achievements**

I am pleased to share a review of another year in the life of Person to Person Citizen Advocacy. The organisation has been providing a Citizen Advocacy service in Caerphilly County Borough for over 25 years.

The year started with coronavirus regulations still in place in Wales. These were to be lifted on the 31<sup>st</sup> May 2022. Person to Person continued with the support structures put in to place at the height of the pandemic so as to maximise the contact between citizen advocates and their partners. Whilst the lifting of restrictions with regard to face-to-face contact was welcomed by many, some people were still extremely cautious about coming into direct contact with others, particularly in enclosed spaces. Citizen advocates and their partners were not immune from these concerns and the Citizen Advocacy Co-ordinator was able to support partnerships struggling to come to terms with the inevitable changes to social interaction following the pandemic.

The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

During the year, Caerphilly County Borough Council carried out an exercise during which people with learning disabilities were asked about the future of disability services in the Borough following the disruption caused by the pandemic. Person to Person was funded to support people with learning disabilities to put forward their views.

Once again the Management Committee is grateful that Caerphilly County Borough Council has recognised the work done over the years by Person to Person in providing help and support to people with learning disabilities in the borough. Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

### **Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £20573 with £6894 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

### **Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas (Chair)**

**Dated : 16<sup>th</sup> October 2023**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2023, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## **INDEPENDENT EXAMINER'S STATEMENT**

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
Chartered Accountant  
Mace and Partners  
52 Talbot Green  
Pontyclun  
Rhondda Cynon Taff  
CF72 8AF

**Date: 16<sup>th</sup> October 2023**

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2023**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2023</u> <u>Total</u>	<u>2022</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	8000	32500	40500	30500
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	1045	29858	30903	29256
Travelling Expenses		-	2625	2625	2175
Training Expenses	4	-	203	203	101
Premises Expenses	5	2135	-	2135	1248
Office Expenses	6	989	131	1120	903
Independent Examiners Fees		732	-	732	720
Depreciation: - Office Equipment		89	22	111	60
<b><u>TOTAL EXPENDITURE</u></b>		4990	32839	37829	34463
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		3010	(339)	2671	(3963)
Fund balance brought forward		17563	7233	24796	28759
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		20573	6894	27467	24796

**PERSON TO PERSON CITIZEN ADVOCACY****BALANCE SHEET AS AT 31ST MARCH 2023**

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2023</u>	<u>2022</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	<u>586</u>	<u>212</u>	<u>798</u>	<u>540</u>
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	71	80	151	60
Cash at Bank		20673	6922	27595	25874
Cash in Hand		<u>96</u>	<u>-</u>	<u>96</u>	<u>131</u>
		<u>20840</u>	<u>7002</u>	<u>27842</u>	<u>26065</u>
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	<u>852</u>	<u>321</u>	<u>1173</u>	<u>1809</u>
<b><u>NET CURRENT ASSETS</u></b>		<u>19988</u>	<u>6681</u>	<u>26669</u>	<u>24256</u>
<b><u>NET ASSETS</u></b>		<u>20574</u>	<u>6893</u>	<u>27467</u>	<u>24796</u>

**Represented By:-****FUNDS**

<b><u>Accumulated Fund Account</u></b>	<u>20574</u>	<u>6893</u>	<u>27467</u>	<u>24796</u>
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Trustee..... *St Thomas*Trustee..... *M R Gornicki*

For and on behalf of the Managing Committee  
Dated 16<sup>th</sup> October 2023

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2023**

1. **PRINCIPAL ACCOUNTING POLICIES**

a) **Accounting Convention**

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) **Incoming resources**

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) **Resources expended and basis of allocation of costs**

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) **Capitalisation and depreciation of tangible fixed assets**

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) **Funds accounting**

Funds held by the charity are:-

**Unrestricted general funds**

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

**Restricted funds**

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

f) **Operating leases**

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2023  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Caerphilly C.B.C.	<u>40500</u>	<u>30500</u>
		<u>40500</u>	<u>30500</u>
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	30903	29256
<p>The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (1 in 2022)</p> <p>No employees received remuneration amounting to more then £50,000 in either year.</p> <p>Mr. W. Thomas of the Executive Committee received a Honorarium of NIL (2022 NIL).</p>			
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	<u>203</u>	<u>101</u>
		<u>203</u>	<u>101</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2023  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Rent	1290	440
	Insurance	845	719
	Repairs & Renewals	-	89
		<u>2135</u>	<u>1248</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	423	347
	Telephone	117	119
	Sundry Expenses	131	-
	Computer Expenses	<u>449</u>	<u>437</u>
		<u>1120</u>	<u>903</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2022	20280	
	Addition	<u>369</u>	
	At 31 <sup>st</sup> March 2023	<u>20649</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2022	19740	
	Charge for the Year	<u>111</u>	
	At 31 <sup>st</sup> March 2023	<u>19851</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2023	798	
	At 31 <sup>st</sup> March 2022	540	
8.	<b><u>CREDITORS</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Wages	-	500
	Travelling	311	589
	Independent Examiners Fee	732	720
	Premises Expenses	120	-
	Office Expenses	<u>10</u>	<u>-</u>
		<u>1173</u>	<u>1809</u>

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2023**  
**(CONTINUED)**

9.	<b><u>DEBTORS</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Prepayments	<u>151</u>	<u>60</u>
		<u>151</u>	<u>60</u>

10. **FUNDS**

Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.

Restricted funds are funds which have been given for particular purposes and projects.

11. **TRANSACTIONS WITH RELATED PARTIES**

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2022 NIL)

**M** MACE

**A** AND

**P** PARTNERS

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CHARTERED ACCOUNTANTS

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**Registered Charity Number**

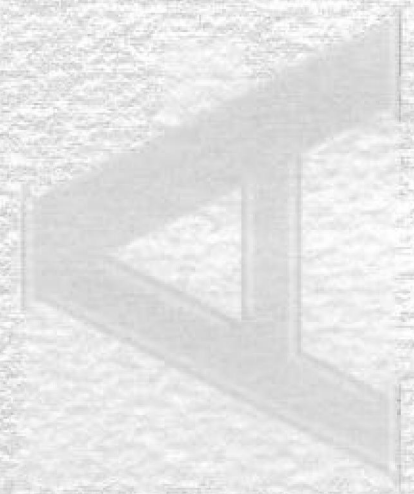
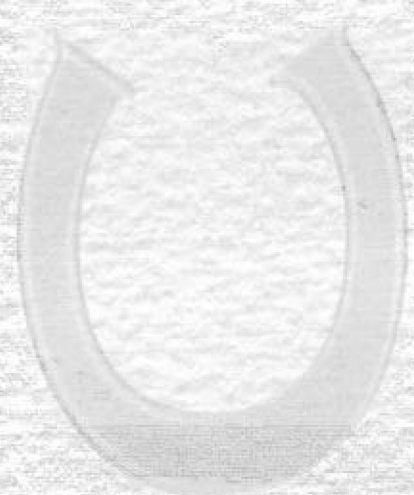
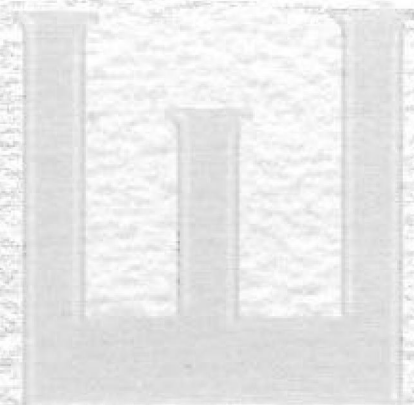
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**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2023**



**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

1185625

**ACCOUNTANTS**

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

**BANKERS**

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

**ACCOUNTS – 31<sup>ST</sup> MARCH 2023**

**PAGES**

- 1 - 2 Trustees Report
- 3 Independent Examiners Report
- 4 Statement of Financial Activities
- 5 Balance Sheet
- 6 - 9 Notes to the Accounts

**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2023**

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2023.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

**Objects, Organisation and Activities**

The Charity is established to promote the relief of people with a learning disability within the boundaries of the former Mid Glamorgan and to assist those people to realise their full potential to lead fulfilling lives by the provision of a service calculated to:-

- i. assist persons as defined above to obtain their full rights and privileges as a citizen:
- ii. provide long term friendship and support:
- iii. provide information to people with a learning disability.

Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

**Review of Progress and Achievements**

I am pleased to share a review of another year in the life of Person to Person Citizen Advocacy. The organisation has been providing a Citizen Advocacy service in Caerphilly County Borough for over 25 years.

The year started with coronavirus regulations still in place in Wales. These were to be lifted on the 31<sup>st</sup> May 2022. Person to Person continued with the support structures put in to place at the height of the pandemic so as to maximise the contact between citizen advocates and their partners. Whilst the lifting of restrictions with regard to face-to-face contact was welcomed by many, some people were still extremely cautious about coming into direct contact with others, particularly in enclosed spaces. Citizen advocates and their partners were not immune from these concerns and the Citizen Advocacy Co-ordinator was able to support partnerships struggling to come to terms with the inevitable changes to social interaction following the pandemic.

The Management Committee is grateful to Caerphilly County Borough Council for funding provided to continue the development of citizen advocacy in the area. Person to Person carries out an ongoing search for individuals with learning disabilities who are isolated, whether socially or geographically, or find themselves in situations that greatly increases their vulnerability. When an individual is identified and indicates to the Advocacy Co-ordinator that they would like to have a citizen advocate the process of recruiting and matching a suitable advocate begins. Since an advocacy partnership is expected to be on a long term basis, it is important that the recruiting and matching process is carried out with the utmost consideration in order for it to be successful. Person to Person has supported partnerships that have survived for many years and where advocate and partner have become close friends.

During the year, Caerphilly County Borough Council carried out an exercise during which people with learning disabilities were asked about the future of disability services in the Borough following the disruption caused by the pandemic. Person to Person was funded to support people with learning disabilities to put forward their views.

Once again the Management Committee is grateful that Caerphilly County Borough Council has recognised the work done over the years by Person to Person in providing help and support to people with learning disabilities in the borough. Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

### **Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £20573 with £6894 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

### **Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas (Chair)**

**Dated : 16<sup>th</sup> October 2023**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2023, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## **INDEPENDENT EXAMINER'S STATEMENT**

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
Chartered Accountant  
Mace and Partners  
52 Talbot Green  
Pontyclun  
Rhondda Cynon Taff  
CF72 8AF

**Date: 16<sup>th</sup> October 2023**

**M** MACE  
**A** AND  
**P** PARTNERS

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2023**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2023</u> <u>Total</u>	<u>2022</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	8000	32500	40500	30500
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	1045	29858	30903	29256
Travelling Expenses		-	2625	2625	2175
Training Expenses	4	-	203	203	101
Premises Expenses	5	2135	-	2135	1248
Office Expenses	6	989	131	1120	903
Independent Examiners Fees		732	-	732	720
Depreciation: - Office Equipment		89	22	111	60
<b><u>TOTAL EXPENDITURE</u></b>		4990	32839	37829	34463
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		3010	(339)	2671	(3963)
Fund balance brought forward		17563	7233	24796	28759
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		20573	6894	27467	24796

**PERSON TO PERSON CITIZEN ADVOCACY****BALANCE SHEET AS AT 31ST MARCH 2023**

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2023</u>	<u>2022</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	<u>586</u>	<u>212</u>	<u>798</u>	<u>540</u>
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	71	80	151	60
Cash at Bank		20673	6922	27595	25874
Cash in Hand		<u>96</u>	<u>-</u>	<u>96</u>	<u>131</u>
		<u>20840</u>	<u>7002</u>	<u>27842</u>	<u>26065</u>
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	<u>852</u>	<u>321</u>	<u>1173</u>	<u>1809</u>
<b><u>NET CURRENT ASSETS</u></b>		<u>19988</u>	<u>6681</u>	<u>26669</u>	<u>24256</u>
<b><u>NET ASSETS</u></b>		<u>20574</u>	<u>6893</u>	<u>27467</u>	<u>24796</u>

**Represented By:-****FUNDS**

<b><u>Accumulated Fund Account</u></b>	20574	6893	27467	24796
--	-------	------	-------	-------

Trustee..... *St Thomas*Trustee..... *M R Gornicki*

For and on behalf of the Managing Committee  
Dated 16<sup>th</sup> October 2023

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2023**

1. **PRINCIPAL ACCOUNTING POLICIES**

a) **Accounting Convention**

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) **Incoming resources**

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) **Resources expended and basis of allocation of costs**

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) **Capitalisation and depreciation of tangible fixed assets**

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) **Funds accounting**

Funds held by the charity are:-

**Unrestricted general funds**

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

**Restricted funds**

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

f) **Operating leases**

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2023  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Caerphilly C.B.C.	<u>40500</u>	<u>30500</u>
		<u>40500</u>	<u>30500</u>
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	30903	29256
<p>The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (1 in 2022)</p> <p>No employees received remuneration amounting to more than £50,000 in either year.</p> <p>Mr. W. Thomas of the Executive Committee received a Honorarium of NIL (2022 NIL).</p>			
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	<u>203</u>	<u>101</u>
		<u>203</u>	<u>101</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2023  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Rent	1290	440
	Insurance	845	719
	Repairs & Renewals	-	89
		<u>2135</u>	<u>1248</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	423	347
	Telephone	117	119
	Sundry Expenses	131	-
	Computer Expenses	<u>449</u>	<u>437</u>
		<u>1120</u>	<u>903</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2022	20280	
	Addition	<u>369</u>	
	At 31 <sup>st</sup> March 2023	<u>20649</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2022	19740	
	Charge for the Year	<u>111</u>	
	At 31 <sup>st</sup> March 2023	<u>19851</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2023	798	
	At 31 <sup>st</sup> March 2022	540	
8.	<b><u>CREDITORS</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Wages	-	500
	Travelling	311	589
	Independent Examiners Fee	732	720
	Premises Expenses	120	-
	Office Expenses	<u>10</u>	<u>-</u>
		<u>1173</u>	<u>1809</u>

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2023**  
**(CONTINUED)**

9.	<b><u>DEBTORS</u></b>	<b><u>2023</u></b>	<b><u>2022</u></b>
	Prepayments	<u>151</u>	<u>60</u>
		<u>151</u>	<u>60</u>

10. **FUNDS**  
Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.  
Restricted funds are funds which have been given for particular purposes and projects.

11. **TRANSACTIONS WITH RELATED PARTIES**

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2022 NIL)

**PERSON TO PERSON CITIZEN ADVOCACY**

England & Wales - Charity number 1185625

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# Accounts

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**2022**



**Person to Person**  
Citizen Advocacy

ANNUAL  
**REPORT**

Registered Charity number  
1185625

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[www.persontoperson.org.uk](http://www.persontoperson.org.uk)

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Financial Report	7
Current Supporters	8

## Alun Thomas



In a year which has been dominated by the measures put in place to combat the covid-19 pandemic, I would like to express my thanks to the citizen advocates who have continued to support their partners in extremely difficult circumstances.

In order for person to Person to provide ongoing support to many of the partnerships whilst identifying and recruiting new citizen advocates, the core funding provided by Caerphilly County Borough Council has been instrumental in the further development of the organisation. The Management Committee is grateful that the CCBC has recognised the work done over the years by Person to Person in providing help and support to people with learning disabilities in the borough. Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

The restrictions imposed on society as a result of lock-down has had a profound impact on the interaction between citizen advocates and their partners as well as the way in which support has been given by the Citizen Advocacy Co-ordinator to the partnerships.

In citizen advocacy circles, face to face contact has been instrumental in giving people with learning disabilities the opportunity to increase their interaction with the wider community. In order to minimise the effect of isolation during the lockdown period, citizen advocates have been resorting to the many forms of digital communication to keep in touch with their partners.

In times of upheaval in communities it is pertinent to remind ourselves of the concept of Citizen Advocacy, namely –

***“An ordinary citizen develops a relationship with another person who risks social exclusion or other unfair treatment because of a disability. As the relationship develops, the advocate chooses ways to understand, respond to and represent the other person’s interests as if they were the advocate’s own.” (John O’Brien).***

Person to Person has been recruiting, matching and supporting citizen advocacy partnerships in Caerphilly County Borough for over twenty years. The knowledge and experience of the Citizen Advocacy Coordinator over this time has added greatly to the understanding of the wishes of individuals with learning disabilities in the area. It is clear there is not a consensus as to what services are most suitable. Needs and wishes differ widely according to the circumstance of each individual.

Through our Citizen Advocacy Coordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

I would like to acknowledge the work done by the citizen advocates, our Citizen Advocate Coordinator, our Office Manager and the management committee over the last twelve months.

Regards,



# Jackie Hughes



Over the last year in my role as Person to Person's Citizen Advocacy Coordinator, I have witnessed many highs and lows as we have learnt to live as safely as we can with the Covid-19 virus.

Even in these uncertain times our Citizen Advocacy project has continued to flourish. It has been wonderful to witness our Citizen Advocacy partnerships re-establishing their connections now that they are once again able to meet up in public and each other's homes.

It has also been great to be able to network again so I have carried out lots of promotional work throughout the Borough which has resulted in many new volunteers coming forward to become Citizen Advocates. These new volunteers have undergone DBS checks and then commenced training before being introduced to a person looking for the support of a Citizen Advocate. We currently have 26 CA partnerships throughout the Caerphilly County Borough.

The value of a Citizen Advocacy partnership is not to be underestimated. Not only does an Advocate support their Partner when making choices about things like moving home, booking holidays, or daytime activities etc.,

# CITIZEN ADVOCACY

but they are also there to offer their friendship and guidance in these difficult times where the closure of day services has resulted in lack of opportunities for social interaction, making many people feel lonely and isolated.

Finally, I would like to thank everyone connected to our project for all the on-going support that they have given me in my role as Citizen Advocacy Coordinator. A big THANK YOU to all our Volunteers, Funders and the Management Committee (who are also volunteers) and to Kate our Office Manager.

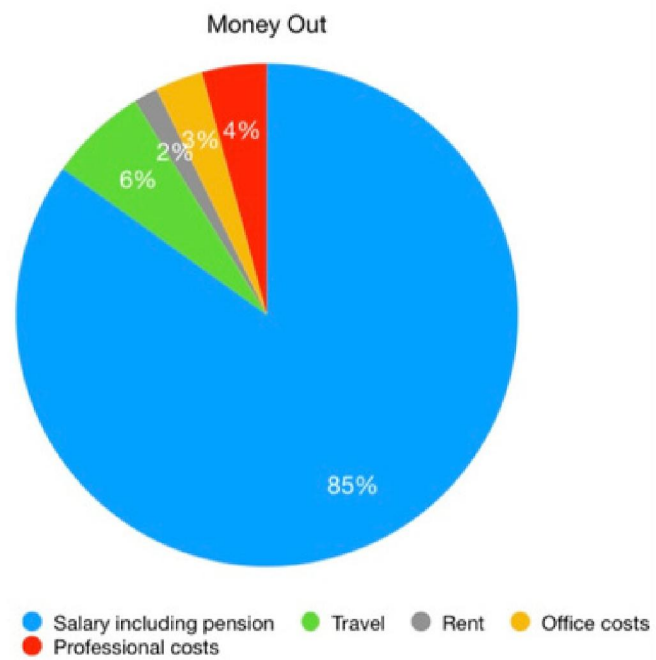


# Will Thomas



Money In	
Caerphilly CBC	£30,500
<b>Total income</b>	<b>£30,500</b>

Money Out	
Salary including pension	£29,256
Travel	£2,175
Rent	£529
Office costs	£1,064
Professional costs	£1,439
<b>Total expenses</b>	<b>£34,463</b>



Many thanks to the members of our Management Committee for all their hard work and commitment to Person to Person Citizen Advocacy:

**Alun Thomas** (Chairperson)

**Lynne Gornicki** (Secretary)

**Will Thomas** (Treasurer)

**Linda Davies** (Trustee)

Lastly, we would also like to thank **Caerphilly County Borough Council** once again for their continued support in our project.





**Person to Person**  
Citizen Advocacy

---

**M** MACE

**A** AND

**P** PARTNERS

---

CHARTERED ACCOUNTANTS

---

**Registered Charity Number**

1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2022**

**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

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PERSON TO PERSON CITIZEN ADVOCACY

TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2022

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Lynne Gorniki	(Secretary)
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- i. assist persons as defined above to obtain their full rights and privileges as a citizen:
- ii. provide long term friendship and support:
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Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

**Review of Progress and Achievements**

In a year which has been dominated by the measures put in place to combat the covid-19 pandemic, citizen advocates have continued to support their partners in extremely difficult circumstances.

In order for person to Person to provide ongoing support to many of the partnerships whilst identifying and recruiting new citizen advocates, the core funding provided by Caerphilly County Borough Council has been instrumental in the further development of the organisation. The Management Committee is grateful that the CCBC has recognised the work done over the years by Person to Person in providing help and support to people with learning disabilities in the borough. Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

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Person to Person has been recruiting, matching and supporting citizen advocacy partnerships in Caerphilly County Borough for over twenty years. The knowledge and experience of the Citizen Advocacy Co-ordinators over this time has added greatly to the understanding of the wishes of individuals with learning disabilities in the area. It is clear there is not a consensus as to what services are most suitable. Needs and wishes differ widely according to the circumstance of each individual.

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### **Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £17563 with £7233 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

### **Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

### **Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas (Chair)**

**Dated : 25/9/2022**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2022, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
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and
- iii. to state whether particular matters have come to my attention.

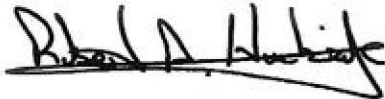
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My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

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In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
**Chartered Accountant**  
**Mace and Partners**  
**52 Talbot Green**  
**Pontyclun**  
**Rhondda Cynon Taff**  
**CF72 8AF**

**Date: 25<sup>th</sup> September 2022**

**PERSON TO PERSON CITIZEN ADVOCACY****STATEMENT OF FINANCIAL ACTIVITIES FOR THE  
YEAR ENDED 31ST MARCH 2022**



	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2022 Total</u>	<u>2021 Total</u>
<b><u>INCOME</u></b>					
Grants	2	8000	22500	30500	31480
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	945	28311	29256	24544
Travelling Expenses		-	2175	2175	194
Training Expenses	4	-	101	101	17
Premises Expenses	5	1159	89	1248	1433
Office Expenses	6	200	703	903	2469
Independent Examiners Fees		720	-	720	780
Depreciation:- Office Equipment		26	34	60	66
<b><u>TOTAL EXPENDITURE</u></b>		3050	31413	34463	29503
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		4950	(8913)	(3963)	1977
Fund balance brought forward		12613	16146	28759	26782
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		17563	7233	24796	28759

PERSON TO PERSON CITIZEN ADVOCACYBALANCE SHEET AS AT 31ST MARCH 2022

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2022</u>	<u>2021</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	<u>306</u>	<u>234</u>	<u>540</u>	<u>600</u>
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	60	-	60	56
Cash at Bank		17127	8747	25874	29252
Cash in Hand		<u>131</u>	<u>-</u>	<u>131</u>	<u>131</u>
		<u>17318</u>	<u>8747</u>	<u>26065</u>	<u>29439</u>
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	<u>1220</u>	<u>589</u>	<u>1809</u>	<u>1280</u>
<b><u>NET CURRENT ASSETS</u></b>					
		<u>16098</u>	<u>8158</u>	<u>24256</u>	<u>28159</u>
<b><u>NET ASSETS</u></b>					
		<u>16404</u>	<u>8392</u>	<u>24796</u>	<u>28759</u>

Represented By:-FUNDS

<b><u>Accumulated Fund Account</u></b>	16404	8392	24796	28759
--	-------	------	-------	-------

Trustee..... Trustee..... 

For and on behalf of the Managing Committee  
Dated 25<sup>th</sup> September 2022

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2022**

1. **PRINCIPAL ACCOUNTING POLICIES**

a) **Accounting Convention**

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) **Incoming resources**

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) **Resources expended and basis of allocation of costs**

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities.

Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) **Capitalisation and depreciation of tangible fixed assets**

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) **Funds accounting**

Funds held by the charity are:-

**Unrestricted general funds**

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

**Restricted funds**

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

f) **Operating leases**

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2022  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2022</u></b>	<b><u>2021</u></b>
	GAVO	-	980
	Caerphilly C.B.C.	<u>30500</u>	<u>30500</u>
		<u>30500</u>	<u>31480</u>
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	29256	24544
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (2 in 2021)		
	No employees received remuneration amounting to more than £50,000 in either year.		
	Mr. W. Thomas of the Executive Committee received a Honorarium of NIL (2021 NIL).		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	<u>101</u>	<u>17</u>
		<u>101</u>	<u>17</u>

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2022**  
**(CONTINUED)**

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2022</u></b>	<b><u>2021</u></b>
	Rent	440	570
	Insurance	719	680
	Repairs & Renewals	89	183
		<u>1248</u>	<u>1433</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	347	403
	Telephone	119	251
	Sundry Expenses	-	120
	Computer Expenses	437	1695
		<u>903</u>	<u>2469</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2021	<u>20280</u>	
	At 31 <sup>st</sup> March 2022	<u>20280</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2021	19680	
	Charge for the Year	60	
	At 31 <sup>st</sup> March 2022	<u>19740</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2022	540	
	At 31 <sup>st</sup> March 2021	600	
8.	<b><u>CREDITORS</u></b>	<b><u>2022</u></b>	<b><u>2021</u></b>
	Wages	500	500
	Travelling	589	-
	Independent Examiners Fee	720	780
		<u>1809</u>	<u>1280</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2022  
(CONTINUED)

- |    |                       |                    |                    |
|----|-----------------------|--------------------|--------------------|
| 9. | <b><u>DEBTORS</u></b> | <b><u>2022</u></b> | <b><u>2021</u></b> |
|    | Prepayments           | <u>60</u>          | <u>56</u>          |
|    |                       | <u>60</u>          | <u>56</u>          |
10. **FUNDS**  
Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.  
Restricted funds are funds which have been given for particular purposes and projects.
11. **TRANSACTIONS WITH RELATED PARTIES**  
Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2021 NIL)

**M** MACE

**A** AND

**P** PARTNERS

---

CHARTERED ACCOUNTANTS

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**Registered Charity Number**

1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2022**

**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

1185625

**ACCOUNTANTS**

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

**BANKERS**

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

**ACCOUNTS – 31<sup>ST</sup> MARCH 2022**

**PAGES**

1 - 2 Trustees Report  
3 Independent Examiners Report  
4 Statement of Financial Activities  
5 Balance Sheet  
6 – 9 Notes to the Accounts

PERSON TO PERSON CITIZEN ADVOCACY

TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2022

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2022.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	

STRUCTURE, GOVERNANCE AND MANAGEMENT

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

**Objects, Organisation and Activities**

The Charity is established to promote the relief of people with a learning disability within the boundaries of the former Mid Glamorgan and to assist those people to realise their full potential to lead fulfilling lives by the provision of a service calculated to:-

- i. assist persons as defined above to obtain their full rights and privileges as a citizen:
- ii. provide long term friendship and support:
- iii. provide information to people with a learning disability.

Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

**Review of Progress and Achievements**

In a year which has been dominated by the measures put in place to combat the covid-19 pandemic, citizen advocates have continued to support their partners in extremely difficult circumstances.

In order for person to Person to provide ongoing support to many of the partnerships whilst identifying and recruiting new citizen advocates, the core funding provided by Caerphilly County Borough Council has been instrumental in the further development of the organisation. The Management Committee is grateful that the CCBC has recognised the work done over the years by Person to Person in providing help and support to people with learning disabilities in the borough. Funding received from CCBC has enabled Person to Person provide some stability for individuals with learning disabilities at a time of continued uncertainty.

The restrictions imposed on society as a result of lock-down has had a profound impact on the interaction between citizen advocates and their partners as well as the way in which support has been given by the Citizen Advocacy Co-ordinator to the partnerships. In citizen advocacy circles, face to face contact has been instrumental in giving people with learning disabilities the opportunity to increase their interaction with the wider community. In order to minimise the effect of isolation during the lockdown period, citizen advocates have been resorting to the many forms of digital communication to keep in touch with their partners. Whilst the advocates themselves have also had to cope with the effects of the pandemic, they have continued to give their time to help their partners.

Person to Person has been recruiting, matching and supporting citizen advocacy partnerships in Caerphilly County Borough for over twenty years. The knowledge and experience of the Citizen Advocacy Co-ordinators over this time has added greatly to the understanding of the wishes of individuals with learning disabilities in the area. It is clear there is not a consensus as to what services are most suitable. Needs and wishes differ widely according to the circumstance of each individual.

Through our Citizen Advocacy Co-ordinator and Citizen Advocates, Person to Person will continue to champion the wishes of people with learning disabilities in partnership with organisations with similar goals.

### **Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £17563 with £7233 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

### **Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

### **Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas (Chair)**

**Dated : 25/9/2022**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2022, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

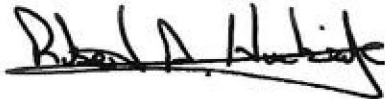
**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## INDEPENDENT EXAMINER'S STATEMENT

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
**Chartered Accountant**  
**Mace and Partners**  
**52 Talbot Green**  
**Pontyclun**  
**Rhondda Cynon Taff**  
**CF72 8AF**

**Date: 25<sup>th</sup> September 2022**

**PERSON TO PERSON CITIZEN ADVOCACY****STATEMENT OF FINANCIAL ACTIVITIES FOR THE  
YEAR ENDED 31ST MARCH 2022**



	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2022 Total</u>	<u>2021 Total</u>
<b><u>INCOME</u></b>					
Grants	2	8000	22500	30500	31480
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	945	28311	29256	24544
Travelling Expenses		-	2175	2175	194
Training Expenses	4	-	101	101	17
Premises Expenses	5	1159	89	1248	1433
Office Expenses	6	200	703	903	2469
Independent Examiners Fees		720	-	720	780
Depreciation:- Office Equipment		26	34	60	66
<b><u>TOTAL EXPENDITURE</u></b>		3050	31413	34463	29503
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		4950	(8913)	(3963)	1977
Fund balance brought forward		12613	16146	28759	26782
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		17563	7233	24796	28759

PERSON TO PERSON CITIZEN ADVOCACYBALANCE SHEET AS AT 31ST MARCH 2022

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2022</u>	<u>2021</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	<u>306</u>	<u>234</u>	<u>540</u>	<u>600</u>
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	60	-	60	56
Cash at Bank		17127	8747	25874	29252
Cash in Hand		<u>131</u>	<u>-</u>	<u>131</u>	<u>131</u>
		<u>17318</u>	<u>8747</u>	<u>26065</u>	<u>29439</u>
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	<u>1220</u>	<u>589</u>	<u>1809</u>	<u>1280</u>
<b><u>NET CURRENT ASSETS</u></b>					
		<u>16098</u>	<u>8158</u>	<u>24256</u>	<u>28159</u>
<b><u>NET ASSETS</u></b>					
		<u>16404</u>	<u>8392</u>	<u>24796</u>	<u>28759</u>

Represented By:-FUNDS

<b><u>Accumulated Fund Account</u></b>	16404	8392	24796	28759
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Trustee..... Trustee..... 

For and on behalf of the Managing Committee  
Dated 25<sup>th</sup> September 2022

**PERSON TO PERSON CITIZEN ADVOCACY**

**NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2022**

1. **PRINCIPAL ACCOUNTING POLICIES**

a) **Accounting Convention**

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) **Incoming resources**

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) **Resources expended and basis of allocation of costs**

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) **Capitalisation and depreciation of tangible fixed assets**

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) **Funds accounting**

Funds held by the charity are:-

**Unrestricted general funds**

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

**Restricted funds**

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

f) **Operating leases**

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2022  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2022</u></b>	<b><u>2021</u></b>
	GAVO	-	980
	Caerphilly C.B.C.	<u>30500</u>	<u>30500</u>
		<u>30500</u>	<u>31480</u>
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	29256	24544
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 1 (2 in 2021)		
	No employees received remuneration amounting to more than £50,000 in either year.		
	Mr. W. Thomas of the Executive Committee received a Honorarium of NIL (2021 NIL).		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	<u>101</u>	<u>17</u>
		<u>101</u>	<u>17</u>

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2022  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2022</u></b>	<b><u>2021</u></b>
	Rent	440	570
	Insurance	719	680
	Repairs & Renewals	89	183
		<u>1248</u>	<u>1433</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	347	403
	Telephone	119	251
	Sundry Expenses	-	120
	Computer Expenses	437	1695
		<u>903</u>	<u>2469</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2021	<u>20280</u>	
	At 31 <sup>st</sup> March 2022	<u>20280</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2021	19680	
	Charge for the Year	60	
	At 31 <sup>st</sup> March 2022	<u>19740</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2022	540	
	At 31 <sup>st</sup> March 2021	600	
8.	<b><u>CREDITORS</u></b>	<b><u>2022</u></b>	<b><u>2021</u></b>
	Wages	500	500
	Travelling	589	-
	Independent Examiners Fee	720	780
		<u>1809</u>	<u>1280</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2022  
(CONTINUED)

- |    |                       |                    |                    |
|----|-----------------------|--------------------|--------------------|
| 9. | <b><u>DEBTORS</u></b> | <b><u>2022</u></b> | <b><u>2021</u></b> |
|    | Prepayments           | 60                 | 56                 |
|    |                       | <u>60</u>          | <u>56</u>          |
10. **FUNDS**  
Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.  
Restricted funds are funds which have been given for particular purposes and projects.
11. **TRANSACTIONS WITH RELATED PARTIES**  
Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2021 NIL)

**PERSON TO PERSON CITIZEN ADVOCACY**

England & Wales - Charity number 1185625

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# Accounts

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**Person to Person  
Citizen Advocacy**

# **Annual Report 2021**

**Registered Charity No: 1047265**

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Financial Report (Will Thomas)	-	7
Current Supporters	-	8

# Chairpersons Address



**Alun Thomas**

*Person to Person Chairperson*

I would like to express my thanks to everyone who has been involved with Person to Person over the past year. In particular, the trustees are proud of the work done by the Citizen Advocates and our staff in endeavouring to help improve the lives of people with learning disabilities in what has been an extremely challenging year.

The year began in April 2020 with Person to Person Citizen Advocacy starting life as a CIO, a Charitable Incorporated Organisation, following our registration with the Charity Commission.

The restrictions that have been in place over the year due to the Covid-19 pandemic have meant that Person to Person, along with all other organisations across the UK, have had to adapt its working practices.

In a year where peoples' lives have been disrupted in many ways, the concept of Citizen Advocacy has been particularly important to many individuals. Citizen Advocacy is where –

*“An ordinary citizen develops a relationship with another person who risks social exclusion or other unfair treatment because of a disability. As the relationship develops, the advocate chooses ways to understand, respond to and represent the other person's interests as if they were the advocate's own.” (John O'Brien).*

# Chairpersons Address

Lockdown and the closure of many services have impacted individuals to different degrees in both positive and negative ways. Social distancing rules and the difficulty in travelling have meant that for a number of people the social isolation that they may already have been experiencing has been increased quite dramatically. For others, the closure of formal services has enabled them to experience more community based activities.

Citizen Advocates, themselves caught up in the constraints and concerns of the pandemic, have had to find innovative ways of keeping in touch with their partners. I would like to thank the Citizen Advocates and our Citizen Advocate Co-ordinator for providing support to the partners in extremely difficult circumstances.

My thanks, once again, to Caerphilly County Borough for their continued funding which has made it possible for the organisation to maintain its core function of providing a Citizen Advocacy service. Person to Person has become an integral part of advocacy and learning disabilities in Caerphilly County Borough.

Once again, I would like to acknowledge the work done by the citizen advocates, our Citizen Advocate Co-ordinator, our Office Manager and the management committee for their work over the last twelve months.



**Chairperson**

## Reference and Administrative details

<b>Will Thomas</b>	-	<b>Treasurer</b>
<b>Lynne Gornicki</b>	-	<b>Secretary</b>
<b>Linda Davies</b>	-	<b>Trustee</b>
<b><u>Employees:</u></b>		
<b>Jackie Hughes</b>	-	<b>Caerphilly Citizen Advocacy Coordinator</b>
<b>Kate Fussell</b>	-	<b>Office Manager</b>

# Citizen Advocacy



**Jackie Hughes**  
*Caerphilly Citizen*

I would like to thank everyone connected to our project for all the on-going support that they have given me in my role as the advocacy coordinator. A huge THANK YOU to all our Volunteers, Funders and the Management Committee (who are also volunteers) and to Kate our Office Manager.

The coronavirus has continued to cause disruption for everyone again this year, with lockdowns came the closure of libraries, cafes, social groups and recourse bases. It has been difficult to network in the local area, and sadly this has impacted on our recruitment of new volunteers.

Currently we have 26 partnerships in the Borough with 19 people on the waiting list, waiting to be matched to volunteer citizen advocates as they become available.

During the past year we have been operating a citizen advocacy service that has been delivered in many different ways, such as, online via zoom, Microsoft Teams, Face Time, telephone, meetings outside (anywhere considered to be a safe environment!)

We have, where possible, maintained contact and kept up to date with all our partnerships, offering on-going support and friendship. Many partners have needed to overcome issues in their lives such as health problems, illness, death of loved ones, problems with housemates in shared living, finances, transport, opening bank accounts, viewing possible new accommodation, booking holidays and days out etc.

# Citizen Advocacy

Many of the people we support have become anxious about the future. People have been unable to see their friends and families to enjoy a hug, a chat and enjoy their local community with all that it offers. This has impacted on people's confidence and the way they live their lives.

However, with the rollout of the vaccination programme, we are finally beginning to see the gradual reopening of the places we all love: social clubs, libraries, cafes and churches etc. so I look forward to meeting with everyone in coming months and hopefully to recruiting new volunteers to support adults with learning disabilities in the Caerphilly Borough!

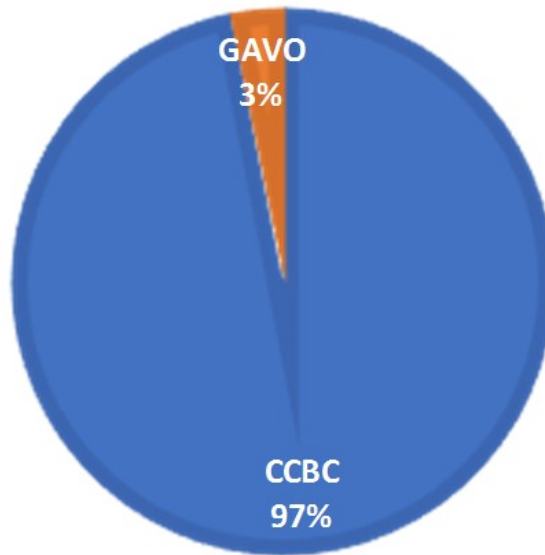


# Financial Report

## INCOME

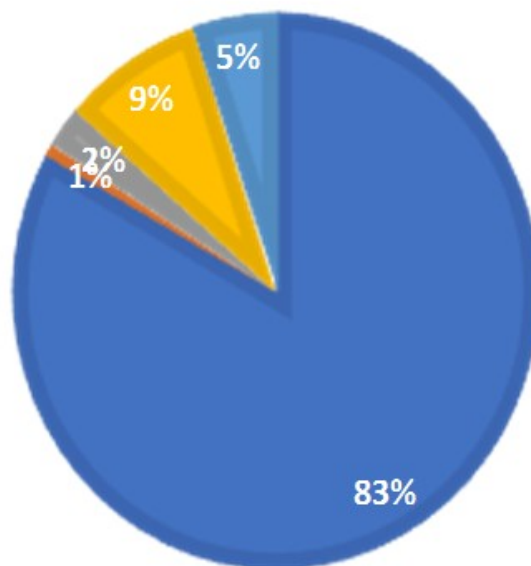
■ CCBC ■ GAVO

INCOME	
CCBC	30500
GAVO	980
	<b>£ 31,480.00</b>
EXPENDITURE	
Wages	24544
Travel	211
Accommodation	711
Office costs	2535
Professional fees	1502
	<b>£ 29,503.00</b>



## EXPENDITURE

■ Wages ■ Travel ■ Accommodation ■ Office costs ■ Professional fees



# Current Supporters



Many thanks to all the members of our  
Management Committee for all their  
hard work and commitment to  
*Person to Person Citizen Advocacy*

**Alun Thomas** (Chairperson)

**Lynne Gornicki** (Secretary)

**Will Thomas** (Treasurer)

**Linda Davies** (Trustee)

**Many thanks as always to the organisations that have  
supported our project over the last year:**



Cymdeithas  
Mudiadau  
Gwirfoddol  
Gwent



Gwent  
Association of  
Voluntary  
Organisations

Rhif Eulusen Gofrestredig / Registered Charity Number: 1113558  
Cwmni Cyfyngedig Drwy Warrant / Company Limited By Guarantee: 5590517

**M** MACE

**A** AND

**P** PARTNERS

---

CHARTERED ACCOUNTANTS

---

**Registered Charity Number**

1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2021**

**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

1185625

**ACCOUNTANTS**

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

**BANKERS**

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

**ACCOUNTS – 31<sup>ST</sup> MARCH 2021**

**PAGES**

1 - 2 Trustees Report  
3 Independent Examiners Report  
4 Statement of Financial Activities  
5 Balance Sheet  
6 – 9 Notes to the Accounts

PERSON TO PERSON CITIZEN ADVOCACY

TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2021

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2021.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	

STRUCTURE, GOVERNANCE AND MANAGEMENT

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

**Objects, Organisation and Activities**

The Charity is established to promote the relief of people with a learning disability within the boundaries of the former Mid Glamorgan and to assist those people to realise their full potential to lead fulfilling lives by the provision of a service calculated to:-

- i. assist persons as defined above to obtain their full rights and privileges as a citizen:
- ii. provide long term friendship and support:
- iii. provide information to people with a learning disability.

Membership of the Organisation shall be open to all individuals or organisations in sympathy with its aims and all advocates and partners within the Organisation.

**Change of charitable status**

Person to Person Citizen Advocacy was registered with the Charity Commission as a CIO - FOUNDATION on 04 Oct 2019.

The Charity Commission informed us that the new charity, Person to Person Citizen Advocacy, Charity Number 1185625, had been registered.

The old organisation, Charity Number 1047265, closed at the end of the financial year (2019/2020) and its assets transferred to the new charity. This took place on 6<sup>th</sup> April 2020.

### **Review of Progress and Achievements**

I am pleased to share a review of another year in the life of Person to Person Citizen Advocacy.

The restrictions that have been in place over the last 12 months due to the Covid-19 pandemic have meant that Person to Person, along with all other organisations across the UK, have had to adapt its working practices.

Support given to Citizen Advocates and their partners has been provided by the Citizen Advocacy Co-ordinator through a variety of forms of social media. Citizen Advocates have been given advice and support on how best they can keep in touch with their partners in a safe and effective way.

Citizen Advocacy partnerships have continued to flourish in Caerphilly . The regular funding from Caerphilly County Borough along with top up funding from various independent funders has enabled the prolonged development of Citizen Advocacy in the Borough. To this end I would like to thank Caerphilly County Borough Council. The organisation has continued to identify other avenues of funding in order to further enhance the project.

We believe that our Citizen Advocacy Co-ordinator has become a vital element in the partnership working model so encouraged by the Welsh Assembly Government. Whilst there is a great demand on the time of our Co-ordinator with regard to recruiting advocates, matching and supporting partnerships, involvement and participation with other agencies is seen as crucial and the Co-ordinator prioritises this part of the work accordingly.

Person to Person has had a presence in the Caerphilly County Borough area for over 25 years and, as a result, the citizen advocates recruited by the organisation have played an integral part in the lives of many individuals. The Citizen Advocacy Co-ordinator's contribution to the development of advocacy across the borough has been extensive and continues to this day.

### **Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £12613 with £16146 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

**Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas** (Chair)

**Dated : 10/11/2021**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2021, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

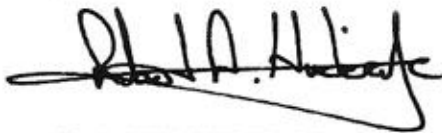
**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## INDEPENDENT EXAMINER'S STATEMENT

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
Chartered Accountant  
Mace and Partners  
52 Talbot Green  
Pontyclun  
Rhondda Cynon Taff  
CF72 8AF

Date: 10<sup>th</sup> November 2021

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2021**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2021</u> <u>Total</u>	<u>2020</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	<u>12000</u>	<u>19480</u>	<u>31480</u>	<u>44500</u>
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	4875	19669	24544	28925
Travelling Expenses		-	194	194	3127
Training Expenses	4	-	17	17	244
Premises Expenses	5	1335	98	1433	1150
Office Expenses	6	1329	1140	2469	1779
Independent Examiners Fees		780	-	780	780
Loss on Office Equipment		-	-	-	3598
Depreciation:- Office Equipment		<u>37</u>	<u>29</u>	<u>66</u>	<u>74</u>
<b><u>TOTAL EXPENDITURE</u></b>		<u>8356</u>	<u>21147</u>	<u>29503</u>	<u>39677</u>
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		3644	(1667)	1977	4823
Fund balance brought forward		<u>8969</u>	<u>17813</u>	<u>26782</u>	<u>21959</u>
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		<u>12613</u>	<u>16146</u>	<u>28759</u>	<u>26782</u>

PERSON TO PERSON CITIZEN ADVOCACY

BALANCE SHEET AS AT 31ST MARCH 2021

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2021</u>	<u>2020</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	<u>340</u>	<u>260</u>	<u>600</u>	<u>666</u>
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	56	-	56	55
Cash at Bank		12819	16433	29252	27338
Cash in Hand		<u>131</u>	<u>-</u>	<u>131</u>	<u>133</u>
		13006	16433	29439	27526
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	<u>1280</u>	<u>-</u>	<u>1280</u>	<u>1410</u>
<b><u>NET CURRENT ASSETS</u></b>					
		<u>11726</u>	<u>16433</u>	<u>28159</u>	<u>26116</u>
<b><u>NET ASSETS</u></b>					
		<u>12066</u>	<u>16693</u>	<u>28759</u>	<u>26782</u>

Represented By:-

**FUNDS**

<b><u>Accumulated Fund Account</u></b>	12066	16693	28759	26782
	<u>        </u>	<u>        </u>	<u>        </u>	<u>        </u>

Trustee.....*AS Thomas*.....  
 Trustee.....*M. L. Carrick*.....

For and on behalf of the Managing Committee  
 Dated 10<sup>th</sup> November 2021

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2021

1. PRINCIPAL ACCOUNTING POLICIES

a) Accounting Convention

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) Incoming resources

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) Resources expended and basis of allocation of costs

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) Capitalisation and depreciation of tangible fixed assets

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) Funds accounting

Funds held by the charity are:-

Unrestricted general funds

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

Restricted funds

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

f) Operating leases

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2021  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	GAVO	980	-
	Coalfields	-	7000
	Peoples Postcode	-	5000
	Didymas Trust	-	2000
	Caerphilly C.B.C.	<u>30500</u>	<u>30500</u>
		<u>31480</u>	<u>44500</u>
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	24544	28425
	Honorarium	-	500
		<u>24544</u>	<u>28925</u>
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 2 (2 in 2020)		
	No employees received remuneration amounting to more than £50,000 in either year.		
	Mr. W. Thomas of the Executive Committee received a Honorarium of NIL (2020 £500).		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	<u>17</u>	<u>244</u>
		<u>17</u>	<u>244</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2021  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	Rent	570	460
	Insurance	680	690
	Repairs & Renewals	<u>183</u>	<u>-</u>
		<u>1433</u>	<u>1150</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	403	553
	Telephone	251	660
	A.G.M. Expenses	-	210
	Sundry Expenses	120	8
	Computer Expenses	<u>1695</u>	<u>348</u>
		<u>2469</u>	<u>1779</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2020	<u>20280</u>	
	At 31 <sup>st</sup> March 2021	<u>20280</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2020	19614	
	Charge for the Year	<u>66</u>	
	At 31 <sup>st</sup> March 2021	<u>19680</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2021	600	
	At 31 <sup>st</sup> March 2020	666	
8.	<b><u>CREDITORS</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	Wages	500	500
	Travelling	-	130
	Independent Examiners Fee	<u>780</u>	<u>780</u>
		<u>1280</u>	<u>1410</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2021  
(CONTINUED)

9.	<b><u>DEBTORS</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	Prepayments	<u>56</u>	<u>55</u>
		<u>56</u>	<u>55</u>

10. **FUNDS**

Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.

Restricted funds are funds which have been given for particular purposes and projects.

11. **TRANSACTIONS WITH RELATED PARTIES**

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2020 £329)

**M** MACE

**A** AND

**P** PARTNERS

---

CHARTERED ACCOUNTANTS

---

**Registered Charity Number**

1185625

**PERSON TO PERSON CITIZEN ADVOCACY**

Statement of Account

For the Year Ended

**31<sup>ST</sup> MARCH 2021**

**PERSON TO PERSON CITIZEN ADVOCACY**

**TRUSTEES**

A Thomas (Chairperson)  
L Gorniki (Secretary)  
Will Thomas (Treasurer)  
Linda Davies

**ADDRESS**

YMCA  
Aaron Place, Gilfach, Bargoed,  
Caerphilly, CF81 8JA

**REGISTERED CHARITY NUMBER**

1185625

**ACCOUNTANTS**

Mace and Partners, Chartered Accountants  
52 Talbot Road, Talbot Green, Pontyclun,  
Rhondda Cynon Taff. CF72 8AF.

**BANKERS**

The Co-Operative Bank Plc  
P O Box 250, Skelmersdale,  
WN8 6WT

**ACCOUNTS – 31<sup>ST</sup> MARCH 2021**

**PAGES**

1 - 2 Trustees Report  
3 Independent Examiners Report  
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6 – 9 Notes to the Accounts

PERSON TO PERSON CITIZEN ADVOCACY

TRUSTEES REPORT FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2021

The Managing Committee present their report for the year ended 31<sup>st</sup> March 2021.

The members of the Managing Committee during the year are as follows:-

Alun Thomas	(Chairperson)
Will Thomas	(Treasurer)
Lynne Gorniki	(Secretary)
Linda Davies	

STRUCTURE, GOVERNANCE AND MANAGEMENT

Managing Committee members are elected or appointed on an annual basis.

The Charity was established by Trust Deed dated 9<sup>th</sup> May 1995 and is registered with the Charity Commission number 1185625. The Charity's address is YMCA, Aaron Place, Gilfach, Bargoed, CF81 8JA.

**Objects, Organisation and Activities**

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### **Review of Progress and Achievements**

I am pleased to share a review of another year in the life of Person to Person Citizen Advocacy.

The restrictions that have been in place over the last 12 months due to the Covid-19 pandemic have meant that Person to Person, along with all other organisations across the UK, have had to adapt its working practices.

Support given to Citizen Advocates and their partners has been provided by the Citizen Advocacy Co-ordinator through a variety of forms of social media. Citizen Advocates have been given advice and support on how best they can keep in touch with their partners in a safe and effective way.

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We believe that our Citizen Advocacy Co-ordinator has become a vital element in the partnership working model so encouraged by the Welsh Assembly Government. Whilst there is a great demand on the time of our Co-ordinator with regard to recruiting advocates, matching and supporting partnerships, involvement and participation with other agencies is seen as crucial and the Co-ordinator prioritises this part of the work accordingly.

Person to Person has had a presence in the Caerphilly County Borough area for over 25 years and, as a result, the citizen advocates recruited by the organisation have played an integral part in the lives of many individuals. The Citizen Advocacy Co-ordinator's contribution to the development of advocacy across the borough has been extensive and continues to this day.

### **Reserves Policy**

It is the policy of the Charity to maintain unrestricted funds, which are the free reserves of the Charity, at a level which will enable the Charity to continue with its unrestricted work for the next two to three months.

The unrestricted funds reserve at the end of the year stood at £12613 with £16146 reserves in the restricted funds.

The charity is funded by grants which are shown at note 2 to the accounts.

**Risk Management**

The trustees have examined the major strategic business and operational risks which the Charity faces and confirm that systems have been established to enable regular reports to be produced so that the necessary steps can be taken to lessen those risks.

**Declaration**

I declare, in my capacity of charity trustee, that:

- i. The trustees have approved the report above; and
- ii. Have authorised me to sign it on their behalf.



.....  
**Alun Thomas** (Chair)

**Dated : 10/11/2021**

**INDEPENDENT EXAMINERS REPORT TO THE  
TRUSTEES OF PERSON TO PERSON CITIZEN ADVOCACY**

I report on the accounts of the Trust for the year ended 31st March 2021, which are set out on pages 4 to 9.

This report is made solely to the charity's trustees, as a body, in accordance with your instructions. Our work has been undertaken so that we might report to you those matters you have required us to state in our report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and its trustees as a body for this report, or for the opinions we have formed.

**RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

The Charity's Trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:-

- i. examine the accounts (under section 145 of the 2011 Act);
- ii. to follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act);  
and
- iii. to state whether particular matters have come to my attention.

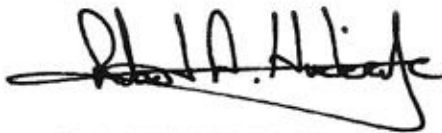
**BASIS OF INDEPENDENT EXAMINER'S REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the account, and seeking explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

## INDEPENDENT EXAMINER'S STATEMENT

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
  - a) to keep accounting records in accordance with section 130, of the 2011 Act; and
  - b) To prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



**R.A. HUCKRIDGE**  
Chartered Accountant  
Mace and Partners  
52 Talbot Green  
Pontyclun  
Rhondda Cynon Taff  
CF72 8AF

Date: 10<sup>th</sup> November 2021

**PERSON TO PERSON CITIZEN ADVOCACY**  
**STATEMENT OF FINANCIAL ACTIVITIES FOR THE**  
**YEAR ENDED 31ST MARCH 2021**

	<u>Notes</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2021</u> <u>Total</u>	<u>2020</u> <u>Total</u>
<b><u>INCOME</u></b>					
Grants	2	<u>12000</u>	<u>19480</u>	<u>31480</u>	<u>44500</u>
<b><u>EXPENDITURE</u></b>					
Wages, Employers NIC and Pension Contributions	3	4875	19669	24544	28925
Travelling Expenses		-	194	194	3127
Training Expenses	4	-	17	17	244
Premises Expenses	5	1335	98	1433	1150
Office Expenses	6	1329	1140	2469	1779
Independent Examiners Fees		780	-	780	780
Loss on Office Equipment		-	-	-	3598
Depreciation:- Office Equipment		<u>37</u>	<u>29</u>	<u>66</u>	<u>74</u>
<b><u>TOTAL EXPENDITURE</u></b>		<u>8356</u>	<u>21147</u>	<u>29503</u>	<u>39677</u>
<b><u>NET INCOME/</u></b>					
<b><u>EXPENDITURE FOR THE YEAR</u></b>		3644	(1667)	1977	4823
Fund balance brought forward		<u>8969</u>	<u>17813</u>	<u>26782</u>	<u>21959</u>
<b><u>FUND BALANCE CARRIED FORWARD</u></b>		<u>12613</u>	<u>16146</u>	<u>28759</u>	<u>26782</u>

**PERSON TO PERSON CITIZEN ADVOCACY**

**BALANCE SHEET AS AT 31ST MARCH 2021**

	<u>Note</u>	<u>Unrestricted</u>	<u>Restricted</u>	<u>2021</u>	<u>2020</u>
<b><u>FIXED ASSETS</u></b>					
Office Equipment	7	<u>340</u>	<u>260</u>	<u>600</u>	<u>666</u>
<b><u>CURRENT ASSETS</u></b>					
Debtors	9	56	-	56	55
Cash at Bank		12819	16433	29252	27338
Cash in Hand		<u>131</u>	<u>-</u>	<u>131</u>	<u>133</u>
		13006	16433	29439	27526
<b><u>CURRENT LIABILITIES</u></b>					
Creditors	8	<u>1280</u>	<u>-</u>	<u>1280</u>	<u>1410</u>
<b><u>NET CURRENT ASSETS</u></b>					
		<u>11726</u>	<u>16433</u>	<u>28159</u>	<u>26116</u>
<b><u>NET ASSETS</u></b>					
		<u>12066</u>	<u>16693</u>	<u>28759</u>	<u>26782</u>

**Represented By:-**

**FUNDS**

<b><u>Accumulated Fund Account</u></b>	12066	16693	28759	26782
	<u>        </u>	<u>        </u>	<u>        </u>	<u>        </u>

Trustee.....*AS Thomas*.....  
 Trustee.....*M. L. Carricki*.....

For and on behalf of the Managing Committee  
 Dated 10<sup>th</sup> November 2021

PERSON TO PERSON CITIZEN ADVOCACY

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED  
31ST MARCH 2021

1. PRINCIPAL ACCOUNTING POLICIES

a) Accounting Convention

The financial statements are prepared under the historical cost convention and in accordance with applicable accounting standards, the Charities SORP2015 (Accounting and Reporting by Charities), and comply with the Charities Act 2011.

b) Incoming resources

Income is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

c) Resources expended and basis of allocation of costs

Expenditure is included on an accruals basis.

Expenditure on operational programmes is recognised in the period in which it is incurred. A designated fund is established for expenditure which has been committed to projects, but remains unspent at the year end.

The majority of costs are directly attributable to specific activities. Certain shared costs are apportioned to activities in furtherance of the objects of the charity.

d) Capitalisation and depreciation of tangible fixed assets

All assets are capitalised.

The cost of the tangible fixed assets is written off at 10% per annum on a reducing balance basis.

e) Funds accounting

Funds held by the charity are:-

Unrestricted general funds

These are funds which can be used in accordance with the charitable objects at the discretion of the trustees.

Restricted funds

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

f) Operating leases

Rentals applicable to operating leases where substantially all the benefits and risks of ownership remain with the lesser are charged to the statement of financial activities.

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2021  
(CONTINUED)

2.	<b><u>GRANTS RECEIVED</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	GAVO	980	-
	Coalfields	-	7000
	Peoples Postcode	-	5000
	Didymas Trust	-	2000
	Caerphilly C.B.C.	<u>30500</u>	<u>30500</u>
		<u>31480</u>	<u>44500</u>
3.	<b><u>STAFF COSTS AND TRUSTEES REMUNERATION</u></b>		
	Salaries & Employers NIC	24544	28425
	Honorarium	-	500
		<u>24544</u>	<u>28925</u>
	The average weekly number of employees during the year calculated on a full time equivalent basis was:- 2 (2 in 2020)		
	No employees received remuneration amounting to more than £50,000 in either year.		
	Mr. W. Thomas of the Executive Committee received a Honorarium of NIL (2020 £500).		
4.	<b><u>TRAINING EXPENSES</u></b>		
	Refreshments	<u>17</u>	<u>244</u>
		<u>17</u>	<u>244</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2021  
(CONTINUED)

5.	<b><u>PREMISES EXPENSES</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	Rent	570	460
	Insurance	680	690
	Repairs & Renewals	<u>183</u>	<u>-</u>
		<u>1433</u>	<u>1150</u>
6.	<b><u>OFFICE EXPENSES</u></b>		
	Printing, Postage, Stationery & Adverts	403	553
	Telephone	251	660
	A.G.M. Expenses	-	210
	Sundry Expenses	120	8
	Computer Expenses	<u>1695</u>	<u>348</u>
		<u>2469</u>	<u>1779</u>
7.	<b><u>TANGIBLE FIXED ASSETS</u></b>		
	<b><u>Cost</u></b>		
	At 1 <sup>st</sup> April 2020	<u>20280</u>	
	At 31 <sup>st</sup> March 2021	<u>20280</u>	
	<b><u>Depreciation</u></b>		
	At 1 <sup>st</sup> April 2020	19614	
	Charge for the Year	<u>66</u>	
	At 31 <sup>st</sup> March 2021	<u>19680</u>	
	<b><u>Net Book Value</u></b>		
	At 31 <sup>st</sup> March 2021	600	
	At 31 <sup>st</sup> March 2020	666	
8.	<b><u>CREDITORS</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	Wages	500	500
	Travelling	-	130
	Independent Examiners Fee	<u>780</u>	<u>780</u>
		<u>1280</u>	<u>1410</u>

PERSON TO PERSON CITIZEN ADVOCACYNOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31ST MARCH 2021  
(CONTINUED)

9.	<b><u>DEBTORS</u></b>	<b><u>2021</u></b>	<b><u>2020</u></b>
	Prepayments	<u>56</u>	<u>55</u>
		<u>56</u>	<u>55</u>

10. **FUNDS**

Unrestricted funds comprise those funds which the trustees are free to use in accordance with the charitable objects.

Restricted funds are funds which have been given for particular purposes and projects.

11. **TRANSACTIONS WITH RELATED PARTIES**

Mr Alun Thomas (Chair) received NIL in travelling expenses for the year (2020 £329)