



# Trustees' Annual Report for the period

|      |                   |    |      |    |                 |    |      |
|------|-------------------|----|------|----|-----------------|----|------|
| From | Period start date |    |      | To | Period end date |    |      |
|      | 01                | 04 | 2021 |    | 31              | 03 | 2022 |

## Section A Reference and administration details

**Charity name** Carmarthenshire Carers Forum

**Other names charity is known by**

**Registered charity number (if any)** 1159710

**Charity's principal address** Maes Y Machlyd

Llanybri

Carmarthen

**Postcode**

SA33 5HJ

### Names of the charity trustees who manage the charity

|    | Trustee name        | Office (if any) | Dates acted if not for whole year | Name of person (or body) entitled to appoint trustee (if any) |
|----|---------------------|-----------------|-----------------------------------|---|
| 1  | Kenneth Jones       |                 |                                   |   |
| 2  | Paul Michael Benson |                 |                                   |   |
| 3  | Eva Millar          |                 |                                   |   |
| 4  | Gwenllian Duncombe  |                 |                                   |   |
| 5  | Michael Scordellis  |                 |                                   |   |
| 6  |                     |                 |                                   |   |
| 7  |                     |                 |                                   |   |
| 8  |                     |                 |                                   |   |
| 9  |                     |                 |                                   |   |
| 10 |                     |                 |                                   |   |
| 11 |                     |                 |                                   |   |
| 12 |                     |                 |                                   |   |
| 13 |                     |                 |                                   |   |
| 14 |                     |                 |                                   |   |
| 15 |                     |                 |                                   |   |
| 16 |                     |                 |                                   |   |
| 17 |                     |                 |                                   |   |
| 18 |                     |                 |                                   |   |
| 19 |                     |                 |                                   |   |
| 20 |                     |                 |                                   |   |

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

| Name | Dates acted if not for whole year |
|------|-----------------------------------|
|      |                                   |
|      |                                   |
|      |                                   |

### Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
|                 |      |         |
|                 |      |         |
|                 |      |         |
|                 |      |         |

### Name of chief executive or names of senior staff members (Optional information)

|  |
|--|
|  |
|--|

## Section B Structure, governance and management

### Description of the charity's trusts

|   |   |
|---|---|
| Type of governing document<br>(eg. trust deed, constitution)        | CIO – Foundation Registered 22 Dec 2014 |
| How the charity is constituted<br>(eg. trust, association, company) | Charitable Incorporated Organisation    |
| Trustee selection methods<br>(eg. appointed by, elected by)         | Appointed by Trustees                   |

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

|  |
|--|
|  |
|--|

## Section C Objectives and activities

### Summary of the objects of the charity set out in its governing document

To support carers in Carmarthenshire in furtherance of their caring role. To help carers identify as such so that they can access services effectively. To ensure carers understand the various systems of support that are available and to help them make informed decisions regarding the available choices. To foster interaction, socialisation, empowerment and understanding.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

To promote the relief of carers in any manner, which now or hereafter may be deemed by law to be charitable in Carmarthenshire. The charity shall have the following powers exercisable in furtherance of its said object but not further or otherwise, namely: -

1. To provide and assist in the provision of information, advice and offer other assistance to carers.
2. To encourage and provide services for those requiring care which take account of the needs of carers and if thought fit to make reasonable charges for any services provided hereunder.
3. To raise public awareness, principally in the County of Carmarthenshire.
4. To communicate between carers, policy makers and other services supporting carers, enabling carers to have an effective voice and an informed representation in policy making and service development.
5. To encourage the exchange by carers, policy makers and other services of useful information and best practice in carers' issues and promote and encourage carers' groups and support schemes principally in Carmarthenshire.
6. To pursue any other charitable purpose.

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main achievements of the charity during the year**

21/22 has seen the Forum go from strength to strength. Our strategy of reach and impact has both increased our membership and impacted our decision makers. Our newsletter has been upgraded to make it look more professional and accessible.

We have increased our membership especially in the East Carmarthenshire area through not only delivering our newsletters, so we have face to face contact with our readers, but by asking for referrals because carers know other carers as relatives and neighbours. This also impacts their mental health as they have someone to talk to who understands them.

Likewise, the number of our informal small coffee morning events of 10 to 20 people have increased giving local people the chance to meet likeminded people whose experience may help them in their dilemmas. This again helps their mental health.

Finally, our countywide forums have been extremely successful where high ranking members of the social services and Health Authorities have spoken to us and subsequently taken questions. The speakers have found it most instructive to talk to those on the coal face so to speak rather than those paid to report to them. Likewise, the carers find it therapeutic to know they are not alone in their experience but also that the decision makers are listening to them.

We continue to be on various committees and forums of 3<sup>rd</sup> sector parties and relevant charities where we can have an impact.

## Section E Financial review

**Brief statement of the charity's policy on reserves**

Keep reserves against the possibility of a reduction in funding.

**Details of any funds materially in deficit**

N/a

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

We have a contract with Carmarthenshire County Council for which we receive £5000.00

All income is spent on core objectives.

We pay Carers travel expenses and replacement care costs so that they can attend our meetings.

We maintain a website and a Facebook group to share information and support Carers

## Section F Other optional information

## Section G Declaration

The trustees declare that they have approved the trustees' report above.

**Signed on behalf of the charity's trustees**

**Signature(s)**



**Full name(s)**

Carmarthen Carers Forum (Jan 26, 2023, 4:04pm)

Mr Michael Scordellis

**Position (eg Secretary, Chair, etc)**

**Date**

26/01/2023



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CHARITY COMMISSION  
FOR ENGLAND AND WALES

Carmarthenshire Carers Forum

1159710

Receipts and payments accounts

CC16a

For the period  
from

Period start date  
01/04/2021


To

Period end date  
31/03/2022

Section A Receipts and payments

|   | Unrestricted<br>funds<br>to the<br>nearest £ | Restricted<br>funds<br>to the<br>nearest £ | Endowment<br>funds<br>to the<br>nearest £ | Total funds<br>to the<br>nearest £ | Last year<br>to the<br>nearest £ |
|---|--|--|---|------------------------------------|----------------------------------|
| <b>A1 Receipts</b>                                    |  |  |   |                                    |                                  |
| Carmarthenshire County Council                        | 10,000                                       | -  | -   | 10,000                             | 11,202                           |
| Pembrokeshire Association                             | 5,000  | -  | -   | 5,000                              | -                                |
| Donations   | 626  | -  | -   | 626                                | 1,100                            |
| Covid 19 Support Fund                                 | -  | -  | -   | -                                  | 930                              |
| Local Giving  | -  | -  | -   | -                                  | 36                               |
| Other   | -  | -  | -   | -                                  | 6                                |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
| <b>Sub total</b> (Gross income for AR)                | <b>15,626</b>                                | <b>-</b>                                   | <b>-</b>                                  | <b>15,626</b>                      | <b>13,274</b>                    |
| <b>A2 Asset and investment sales, (see table).</b>    |  |  |   |                                    |                                  |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
| <b>Sub total</b>                                      | <b>-</b>                                     | <b>-</b>                                   | <b>-</b>                                  | <b>-</b>                           | <b>-</b>                         |
| <b>Total receipts</b>                                 | <b>15,626</b>                                | <b>-</b>                                   | <b>-</b>                                  | <b>15,626</b>                      | <b>13,274</b>                    |
| <b>A3 Payments</b>                                    |  |  |   |                                    |                                  |
| General Fund  | 14,378                                       | -  | -   | 14,378                             | 6,428                            |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
|   | -  | -  | -   | -                                  | -                                |
| <b>Sub total</b>                                      | <b>14,378</b>                                | <b>-</b>                                   | <b>-</b>                                  | <b>14,378</b>                      | <b>6,428</b>                     |
| <b>A4 Asset and investment purchases, (see table)</b> |  |  |   |                                    |                                  |
|   | -  | -  | -   | -                                  | 700                              |
|   | -  | -  | -   | -                                  | -                                |
| <b>Sub total</b>                                      | <b>-</b>                                     | <b>-</b>                                   | <b>-</b>                                  | <b>-</b>                           | <b>700</b>                       |
| <b>Total payments</b>                                 | <b>14,378</b>                                | <b>-</b>                                   | <b>-</b>                                  | <b>14,378</b>                      | <b>7,128</b>                     |
| <b>Net of receipts/(payments)</b>                     | <b>1,249</b>                                 | <b>-</b>                                   | <b>-</b>                                  | <b>1,249</b>                       | <b>6,146</b>                     |
| <b>A5 Transfers between funds</b>                     | <b>-</b>                                     | <b>-</b>                                   | <b>-</b>                                  | <b>-</b>                           | <b>-</b>                         |
| <b>A6 Cash funds last year end</b>                    | <b>15,877</b>                                | <b>-</b>                                   | <b>-</b>                                  | <b>15,877</b>                      | <b>9,731</b>                     |
| <b>Cash funds this year end</b>                       | <b>17,126</b>                                | <b>-</b>                                   | <b>-</b>                                  | <b>17,126</b>                      | <b>15,877</b>                    |

## Section B Statement of assets and liabilities at the end of the period

| Categories  | Details   | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|---|---|------------------------------------|----------------------------------|---------------------------------|
| <b>B1 Cash funds</b>  | HSBC Account  | 17,126                             | -                                | -                               |
|   |   | -                                  | -                                | -                               |
|   |   | -                                  | -                                | -                               |
|   | <b>Total cash funds</b>   | 17,126                             | -                                | -                               |
|   | (agree balances with receipts and payments account(s))                              | OK                                 | OK                               | OK                              |
|   |   | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
| <b>B2 Other monetary assets</b>                             | Details   |                                    |                                  |                                 |
|   |   | -                                  | -                                | -                               |
|   |   | -                                  | -                                | -                               |
|   |   | -                                  | -                                | -                               |
|   |   | -                                  | -                                | -                               |
|   |   | -                                  | -                                | -                               |
|   |   | -                                  | -                                | -                               |
| <b>B3 Investment assets</b>                                 | Details   | Fund to which asset belongs        | Cost (optional)                  | Current value                   |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
| <b>B4 Assets retained for the charity's own use</b>         | Details   | Fund to which asset belongs        | Cost (optional)                  | Current value                   |
|   | 07/12/2020 HP Computer  |                                    | 700                              | 560                             |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
|   |   |                                    | -                                | -                               |
| <b>B5 Liabilities</b>                                       | Details   | Fund to which liability            | Amount due (optional)            | When due (optional)             |
|   |   |                                    | -                                |                                 |
|   |   |                                    | -                                |                                 |
|   |   |                                    | -                                |                                 |
|   |   |                                    | -                                |                                 |
|   |   |                                    | -                                |                                 |
| Signed by one or two trustees on behalf of all the trustees | Signature   | Print Name                         | Date of approval                 |                                 |
|   |  | Mr Michael Scordellis              | 26/01/2023                       |                                 |
|   | Carmarthen Carers Forum (Jan 26, 2023, 4:04pm)                                      |                                    |                                  |                                 |





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## Independent examiner's report on the accounts

### Section A

### Independent Examiner's Report

Report to the trustees/  
members of

Charity Name  
Carmarthenshire Carers Forum

On accounts for the year  
ended

31/03/2022

Charity no  
(if any)

1159710

Set out on pages

1 and 2 'Receipts and payments accounts'

(remember to include the page numbers of additional sheets)

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 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent  
examiner's statement

My examination was carried out in accordance with 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 accounts, and seeking explanations from the trustees concerning any 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 (other than that disclosed below \*)

1. which gives me reasonable cause to believe that in, any material respect, the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act have not been met; or

2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

\* Please delete the words in the brackets if they do not apply.

Signed:

Date: 19/01/2023

Name:

Gwennan Thomas

Relevant professional  
qualification(s) or body  
(if any):

FCCA

**Address:**

TaxAssist Accountants

8 Station Road

Llanelli, Carm. SA15 1AL

**Section B**

**Disclosure**

Only complete if the examiner needs to highlight material problems.