



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From 1/4/2024  
Period end date

Period start date To 31/3/2025

**Charity name: Swansea Parent Carer Forum**

**Charity registration number: 1189730**

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>To relieve the needs of disabled children of all ages.</p> <ol style="list-style-type: none"><li>1. The provision and opportunities for parent carers to influence the decisions that affect their families and to contribute to developing services that meet the need of their families.</li><li>2. The provision of advice and support to parent carers via workshops and other means to uniform and empower about the services and issues that affect them and their families.</li></ol>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>Our Purpose – We are an independent organisation whose purpose is:-</p> <ul style="list-style-type: none"><li>● To strategically influence change by co-producing services for disabled children, young people and adults and their families.</li><li>● To enable disabled children, young people and adults and their families to have a voice at the centre of decision making.</li><li>● To reflect the diversity of our</li></ul>

		<p>communities.</p> <ul style="list-style-type: none"> <li>● To take a rights-based approach and empower our community.</li> </ul>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<p>As a charity we have regard to the Charity Commission's public benefit guidance. Trustees make decisions to ensure the charity's purpose provides benefit to our membership. We also make decisions to manage risks of detriment or harm to our membership and partners that might result from carrying out its purpose.</p> <p>We are a member of and work with Swansea Council for Voluntary Service who provide training and guidance on good governance.</p>

#### **Additional information (optional)**

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	<p>Trustees also volunteer for the Forum.</p> <p>The Forum has a large parent carer membership with support from members at coffee mornings, workshops and events.</p>

Other		
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## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<ul style="list-style-type: none"> <li>● We co-produce and co-design services that meet the needs of disabled children of all ages and their families e.g. Additional Learning Needs Implementation, Direct Payments and Carers Needs Assessments improving services to meet needs of parent carers.</li> <li>● We develop and empower our membership to have a strong collective voice and to influence positive change by providing a constructive channel of communication between parent carers and strategic partners. We achieve this through sitting on working groups with the Local Authority, Health Board and West Glamorgan Regional Partnership.</li> <li>● Arranging and hosting training workshops and coffee mornings for parent carers.</li> <li>● We published the results of our second Big Survey of members.</li> <li>● We listen and feed the voice of parent carers in Swansea into decision making.</li> <li>● We collaborate with the Regional Partnership Board and its transformation team.</li> <li>● We also contribute to Welsh Government consultations and</li> </ul>

		various Steering Groups.
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**Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	As at 31/3/2025 we held £33,813
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<ul style="list-style-type: none"> <li>● SPCF intends to spend all its (unrestricted) funds received in any given year on supporting the aims and objectives of the charity.</li> <li>● We wish to be prudent, however, and have set a reserve in order to ensure SPCF has funds available for emergencies, unforeseen opportunities etc.</li> <li>● This reserve can be used for any agreed purpose the trustees see fit, in order to fulfil the charity's continued operation and support for its members, and the wider parent carer community.</li> <li>● SPCF is setting aside 5% of the unrestricted funds</li> </ul> <p>This reserves policy shall be regularly reviewed and monitored in order to ensure it continues to meet the needs of SPCF, taking into account changes in funding, the local landscape, membership etc and at least annually the review will be minuted.</p>
Amount of reserves held	Para 1.22	£3,750
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

### Additional information (optional)

You may choose to include further statements where relevant about:

		<ul style="list-style-type: none"> <li>● Grant from Swansea Local authority</li> </ul>
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The charity's principal sources of funds (including any fundraising)	Para 1.47	3 independent grants <ul style="list-style-type: none"> <li>● National Lottery Community Fund – Information packs</li> <li>● Waterloo Foundation – Coffee mornings</li> <li>● True Colours Trust – IT equipment</li> </ul>
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation (Foundation Model)
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<ol style="list-style-type: none"> <li>1. There must be at least three charity trustees and every charity trustee must be a resident of Swansea and must be a parent or carer of a person of any age with a disability.</li> <li>2. Apart from the first charity trustees, every trustee must be appointed by a resolution passed at a properly convened meeting of the charity trustees.</li> </ol> <p>In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.</p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<p>Volunteer policies and procedures have been updated during 2024-5.</p> <p>A trustee now attends Swansea Volunteering Forum run by SCVS</p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	

Relationship with any related parties	Para 1.51	
Other		

### Reference and Administrative details

Charity name	Swansea Parent carer Forum
Other name the charity uses	SwanseaPCF
Registered charity number	1189730
Charity's principal address	17 Cwrt Clos Y Carne Gorseinon Swansea SA4 4NF



### 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	Joanann Phillips	Chair		
	2	Chris Law	Treasurer		
	3	Ishbel Hansen	Secretary		
	4				
	5				
	6				
	7				
	8				
	9				
	10				
	11				
	12				
	13				
	14				
	15				
	16				
	17				
	18				
	19				
	20				

### Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

[illegible]

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

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

	Type of adviser	Name	Address
	Name of chief executive or names of senior staff members (Optional information)		

## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information


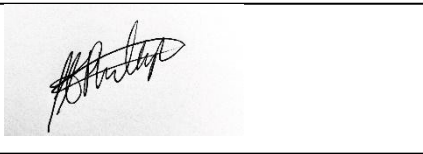
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Declarations

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

Signed on behalf of the charity's trustees

	Signature(s)		
	Full name(s)	Chris Law	Jo Phillips
	Position (eg Secretary, Chair, etc)	Treasurer	Chair
	Date	28/4/2025	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

SWANSEA PARENT CARER FORUM

1189730

CC16a

## Receipts and payments accounts

For the period  
from

01/04/2024

To

31/03/2025

### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
LA	82,000		-	82,000	75,000
Donations		-	-	-	35
National Lottery Community Fund	-	4,120	-	4,120	
Local Giving	-		-	-	500
Austin Bailey	-		-	-	1,000
Waterloo Foundation	-	760	-	760	
True Colours Trust		2,307		2,307	
Other	2,006	-	-	2,006	
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>84,006</b>	<b>7,187</b>	<b>-</b>	<b>91,193</b>	<b>76,535</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>84,006</b>	<b>7,187</b>	<b>-</b>	<b>91,193</b>	<b>76,535</b>
<b>A3 Payments</b>					
Information packs	-	4,111	-	4,111	
Celebration Event	26,169		-	26,169	4,139
Insurance	172	-	-	172	254
Stationery & Consumables	740	-	-	740	472
Coffee morning project		400	-	400	2,662
SCVS	40,603		-	40,603	40,603
Action for Children	7,500		-	7,500	7,500
Survey	800			800	
Training	280			280	
Storage	314			314	
Other	5,332	-	-	5,332	3,923
Workshops	1,318	117	-	1,435	1,638
<b>Sub total</b>	<b>83,228</b>	<b>4,628</b>	<b>-</b>	<b>87,856</b>	<b>61,191</b>
<b>A4 Asset and investment purchases, (see table)</b>					
Equipment	102	-	-	102	
	-	-	-	-	
<b>Sub total</b>	<b>102</b>	<b>-</b>	<b>-</b>	<b>102</b>	<b>-</b>
<b>Total payments</b>	<b>83,330</b>	<b>4,628</b>	<b>-</b>	<b>87,958</b>	<b>61,191</b>
<b>Net of receipts/(payments)</b>	<b>676</b>	<b>2,559</b>	<b>-</b>	<b>3,235</b>	<b>15,344</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>30,142</b>	<b>436</b>	<b>-</b>	<b>30,578</b>	<b>15,234</b>
<b>Cash funds this year end</b>	<b>30,818</b>	<b>2,995</b>	<b>-</b>	<b>33,813</b>	<b>30,578</b>

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	At bank	30,818	2,995	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>30,818</b>	<b>2,995</b>	<b>-</b>
	(agree balances with receipts and payments account(s))			
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>	Details			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	IT		3,630	-
	Equipment		1,152	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Jo Phillips		
		Chris Law		



CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Independent examiner's report on the accounts

### Section A

### Independent Examiner's Report

#### Report to the trustees

Charity Name

SWANSEA PARENT CARER FORUM

#### On accounts for the year ended

31<sup>ST</sup> MARCH 2025

Charity no  
(if any)

1189730

#### Set out on pages

1-2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2025.

#### Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

#### Independent examiner's statement

~~[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [ ] if not applicable.~~

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below \*) which gives me cause to believe that in, any material respect:

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

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report 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:

16/10/25

Name:

DANIEL PERRIN

Relevant professional  
qualification(s) or body

FCCA (ASSOCIATION OF CHARTERED  
CERTIFIED ACCOUNTANTS)



(if any):

--

Address:

9 STANLEY PLACE
CADOXTON
NEATH SAIO SBE

**Section B**

**Disclosure**

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

NONE



CHARITY COMMISSION  
FOR ENGLAND AND WALES

SWANSEA PARENT CARER FORUM

1189730

## Receipts and payments accounts

CC16a

For the period  
from

01/04/2024

To

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		-	-	-
		-	-	-
		-	-	-
		-	-	-
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<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Jo Phillips		
		Chris Law		



CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Independent examiner's report on the accounts

### Section A

### Independent Examiner's Report

#### Report to the trustees

Charity Name

SWANSEA PARENT CARER FORUM

#### On accounts for the year ended

31<sup>ST</sup> MARCH 2025

Charity no  
(if any)

1189730

#### Set out on pages

1-2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2025.

#### Responsibilities and basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

#### Independent examiner's statement

~~[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [ ] if not applicable.~~

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below \*) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
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- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report 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:

16/10/25

Name:

DANIEL PERRIN

Relevant professional  
qualification(s) or body

FCCA (ASSOCIATION OF CHARTERED  
CERTIFIED ACCOUNTANTS)

(if any):

Address: 9 STANLEY PLACE  
CADOXTON  
NEATH SAIO SBE

Section B

Disclosure

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Give here brief details of any items that the examiner wishes to disclose.

NONE