



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 02/09/22 **Period start date To** 02/09/23 **Period end date**

Charity name: Wales Women's Budget Group

Charity registration number: 1199336

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>The objects of the CIO are the promotion of gender equality in Wales, for the public benefit, by:</p> <ol style="list-style-type: none">1. Advancing education and raising awareness in gender equality issues in economic and public policy;2. Supporting and disseminating research on gender equality in economic and public policy, and gender budgeting and publishing the results to the public;3. Advocating for greater equality for women and men by providing independent analysis of gender issues in fiscal policy;4. Working with women, communities, government, policy makers and the public to build understanding of the gender implications of economic policy and encouraging and supporting engagement in the budgetary processes and the use of gender budgeting tools.
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	<ul style="list-style-type: none">• WWBG provides robust independent policy analysis of Welsh and UK government spending decisions and fiscal policy, advocating for the use of gender budgeting, gender equal decision making and fairer budgetary processes.• WWBG produces high quality, independent research on the key policy areas relating to gender equality in Wales and the UK.• WWBG works to build capacity amongst policymakers, women's organisations, the wider third sector and the public by providing gender

		<p>responsive budgeting training and online resources.</p> <ul style="list-style-type: none"> • WWBG works closely with our sister organisations across the UK to advocate for gender equality and gender budgeting in the UK, producing cross-nation budget analyses and organising cross-nation assemblies and conferences. • WWBG acts as a bridge between research bodies and the women's movement in Wales to ensure that economic research in Wales provides robust evidence, making the case for changes that help women in Wales achieve their potential.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	Trustees have regard to the guidance issued by the Charity Commission on public benefit.

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	
Other		

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	<p>This year, we have raised awareness of how gender budgeting can increase equality with Welsh policymakers. We have done this through:</p> <ul style="list-style-type: none"> • Regular meetings with Welsh Treasury officials. • Membership of the Budget Improvement and Impact Advisory Group (BIIAG). • Meeting with the Minister for Social Justice and Deputy Minister for Social Services in Sept. 22 • Technical Briefing for the Senedd Finance Committee (Sept. 22) on gender budgeting ahead of draft budget scrutiny • Presentation to the Senedd Cross Party Group on Women, on gender budgeting progress in Wales. <p>We have also raised awareness of gender budgeting amongst the public and increased the capacity of the wider women's sector to engage with economic issues through:</p> <ul style="list-style-type: none"> • Development of new web-based resources on an introduction to gender budgeting. • Delivering an online training course 'An Introduction to Gender Budgeting,' (Feb. 23) • Organising a 4-Nations Assembly on Childcare with our sister organisations in Scotland, Northern Ireland and the UK in April 2022. • Organising a 4-Nations Conference on the Cost of Living Crisis in Feb 23, attended by over 200 participants including policymakers, women's organisations, civil society, academics and members of the public. <p>We have produced a number of evidence-based, gendered analysis of economic and public policy which make the case for gender equality in Wales. This includes:</p> <ul style="list-style-type: none"> • Written response to the Senedd Finance Committee pre-budget inquiry • Gender Budgeting Briefing paper provided to Members of the Senedd. • In-depth analysis paper on Benefit Conditionality, Sanctions and

		Women in Wales (August 2023).
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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	Attached
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The charity is small and has limited fixed overheads and operating expenditure for the time being this essentially amounts to one part-time salary. Our reserves policy is to hold 6-months operating costs, which currently amount to £20500.
Amount of reserves held	Para 1.22	£41337
Reasons for holding zero reserves	Para 1.22	NA
Details of fund materially in deficit	Para 1.24	NA
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	NA

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
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	Foundation model constitution
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	Charitable Incorporated Organisation (CIO)
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	Original trustees named in constitution for fixed terms. New trustees appointed for a term of 3 years by a resolution passed at a properly convened meeting of the trustees (quorum 2 or one third, whichever is greater).

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	
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	Wales Women's Budget Group (WWBG)
Other name the charity uses	NA
Registered charity number	1199336
Charity's principal address	Temple of Peace, King Edward VII Ave Cathays Park, Cardiff, CF10 3AP United Kingdom

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	Cerys Furlong	2022-2026	NA	NA
2	Dr Rachel Minto	2022-2024 2024-2026	NA	NA
3	Catherine Fookes	2022-2025	NA	NA
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		
NA		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NA		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	NA
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
NA		

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

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

NA

Other optional information

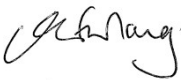
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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

CERYS FURLONG	
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Position (eg Secretary,
Chair, etc)

CHAIR	
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Date

08/10/24



CHARITY COMMISSION
FOR ENGLAND AND WALES

Receipts and payments accounts

CC16a

For the period
from

Period start date
02/09/2022

To

Period end date
01/09/2023

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 £
A1 Receipts					
Grant income		126,577		126,577	
				-	
				-	
				-	
Sub total (Gross income for AR)	-	126,577	-	126,577	-
A2 Asset and investment sales, (see table).					
		-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	-	126,577	-	126,577	-
A3 Payments					
Salaries		40,951		40,951	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
Sub total	-	40,951	-	40,951	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	-	40,951	-	40,951	-
Net of receipts/(payments)	-	85,626	-	85,626	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	-	85,626	-	85,626	-

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 £
B1 Cash funds	Bank account	-	85,626	-
				-
				-
	Total cash funds	-	85,626	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets			-	-
				-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities		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	



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				-	
				-	
				-	
Sub total (Gross income for AR)	-	126,577	-	126,577	-
A2 Asset and investment sales, (see table).					
		-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	-	126,577	-	126,577	-
A3 Payments					
Salaries		40,951		40,951	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
				-	
Sub total	-	40,951	-	40,951	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	-	40,951	-	40,951	-
Net of receipts/(payments)	-	85,626	-	85,626	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	-	85,626	-	85,626	-

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 £
B1 Cash funds	Bank account	-	85,626	-
				-
				-
	Total cash funds	-	85,626	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets			-	-
				-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities		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	