

# PEOPLE AND WORK UNIT

England & Wales · Charity number 515211

## Details

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Status	Registered
Legal form	Charitable company
Company number	<a href="#">01809654</a>
Registered	1984-06-13
Register	<a href="#">View on the Charity Commission register</a>

## Contact

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Address	Community Room @Loudoun Plas Iona Butetown Cardiff CF10 5HW
Phone	02920488536
Email	<a href="mailto:admin@peopleandwork.org.uk">admin@peopleandwork.org.uk</a>
Website	<a href="http://www.peopleandwork.org.uk">www.peopleandwork.org.uk</a>

## Activities

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**Objects:** A) TO ADVANCE EDUCATION BY CARRYING OUT AND/OR ASSISTING IN CARRYING OUT RESEARCH AND STUDY INTO SOCIAL AND ECONOMIC PROBLEMS, FOR THE BENEFIT OF THE GENERAL PUBLIC B) TO PROMOTE EDUCATION IN ALL MATTERS RELATED TO COMMUNITY ORGANISATIONS.

**Activities:** The charity's objects are the advancement of education by carrying out and/or assisting in carrying out research, action and study associated with social and economic disadvantage and to promote education in all matters related to community organisations. The Unit undertakes action research programmes in partnership with community groups focusing on supporting people to gain qualifications.

## Classification

- **How:** Provides Human Resources, Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** Education/training, The Prevention Or Relief Of Poverty, Economic/community Development/employment
- **Who:** Children/young People, Other Charities Or Voluntary Bodies, The General Public/mankind

## Geography

- **Area of benefit:** GENERAL, BUT WITH PARTICULAR REFERENCE TO THE PEOPLE GWENT (NOW MONMOUTHSHIRE, TORFAEN, NEWPORT, BLAENAU GWENT AND PARTS OF CAERPHILLY)
- Throughout Wales

## Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£457,048	£513,551	-	-
2023-12-31	£570,524	£435,630	£312,060	13
2022-12-31	£575,663	£557,845	£179,054	12
2021-12-31	£539,401	£522,815	£164,821	11
2020-12-31	£442,413	£412,999	-	-

## Trustees

Name	Role	Appointed
Claire Betty Vallance		2023-10-04
Claudine Nicola Anderson		2026-06-03
David Rees		2021-02-01
Gerard McHugh		2018-01-08
Jan Louise Huyton		2015-10-05
PHILIP GLYN WATKINS		
Susan Caroline Davies		2025-09-01
Susan Mary Walker		2026-06-03
Tracey Sandra Stanley		2026-06-03

**PEOPLE AND WORK UNIT**

England & Wales - Charity number 515211

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# Accounts

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Charity registration number 515211

Company registration number 01809654 (England and Wales)

**PEOPLE AND WORK UNIT**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2024**

# PEOPLE AND WORK UNIT

## LEGAL AND ADMINISTRATIVE INFORMATION

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**Trustees** Dr C Sophocleous  
P G Watkins  
G J McHugh  
J L Huyton  
D J Rees  
C B Vallance

**Secretary** S Lloyd-Jones

**Charity number** 515211

**Company number** 01809654

**Registered office** Unit 1 @Loudon  
Plas Iona  
Bute Town  
Cardiff  
CF10 5HW

**Independent examiner** Dorrell Oliver Ltd  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

**Bankers** HSBC Bank plc  
1 Bridge Street  
Newport  
South Wales  
NP20 6UT

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# PEOPLE AND WORK UNIT

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# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) FOR THE YEAR ENDED 31 DECEMBER 2024

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The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019).

### **Objectives and activities**

The charity's objects are the advancement of education by carrying out and/or assisting in carrying out research and study into social and economic problems for the benefit of the general public; additionally, to promote education in all matters related to community organisations.

People and Work seeks to make a difference through two core functions:

- to promote the value of education and learning (for all age groups) as a tool for tackling inequalities and promoting employment, through a programme of community-based action research projects; and
- to undertake commissioned research and evaluation work for the public and third sectors in Wales addressing inequalities in areas such as education (formal and informal), health and employment.

People and Work's self-generated action research work is funded through charitable trusts and funds. Earned income comes from commissioned research and evaluation work done for the public and voluntary sectors. Any surplus earned through the research and evaluation contracts goes into action research work that aims to build understanding of effective ways to tackle the causes and effects of poverty, especially in relation to education, health and employment outcomes.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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### Achievements and performance

*Significant activities and achievements against objectives*

#### **Cenedlaeth Rhondda Generation**

People and Work have continued to support a group of Rhondda residents as they develop a new charity, called Generation Rhondda, focused on developing wellbeing cross the Rhondda Valleys. Over the last year we have employed the five core leaders and five local trainees to build the work. In 2024 they registered as a non-profit limited company and began the process of registering as a charity. They took on their first employees and currently have four staff. The plan is for the group to be fully independent of People and Work by the Autumn of 2025.

Their approach focuses on working with people in Rhondda to develop all aspects of wellbeing – health and fitness, learning, employment and digital inclusion. Over the last year the group have moved towards working with whole families and, increasingly, running activities in the evening and weekends to open access up to people who cannot get involved during the working day.

They have continued to focus on how they work with other organisations locally and have developed close working links with 29 local groups and organisations. After consideration they have decided against trying to secure a core venue as by taking their activities to partner venues they are supporting the viability of others and ensuring that there is local access. They travel to communities rather than asking community members to travel to them.

They have secured funding from the Rank Foundation and a National Lottery Community Fund grant and are working to secure further funding.

The key programmes currently being run are:

#### **Employment support**

The employment support project has continued to help people access employment through job searches and developing their CVs. The drop-in support sessions have been developed to target specific groups including college students and parents.

Working closely with the Rhondda Digidol programme, people have been supported to access online services and opportunities.

Tom Jenkins, who leads the employment support work, identified a need to support young people still at school to raise their understanding of employment opportunities and what they could do to access better work before they leave school. In the last year Tom has run two pilot programmes called STRIVE in schools with young people, inviting local employers and entrepreneurs along to talk to them. The evaluation showed positive responses from pupils and teachers - *"STRIVE has helped me with what I think I will need the most support with after school by making me realise that there are more ways to become successful in life"*(young person involved in the pilot). In 2025 the plan is to work with two more comprehensive schools in Rhondda.

#### **Reading Rhondda Darllen**

Reading Rhondda has continued to run family reading sessions in schools, pre-school and youthwork settings working with an average of 90-100 children and their families on a weekly basis. Over the year the project worked with twelve schools, including a special needs school, and continued to support three other schools. Schools are encouraged to take over the running of the sessions when they can with parents volunteering to organise activities and read the books. With funding from the Shared Prosperity Fund a support worker was employed who could deliver the work through the medium of Welsh, which has allowed the project to work with families in two Welsh medium schools in Rhondda and also run bi-lingual pre-school and community sessions. This was especially valued where parents and carers do not themselves speak Welsh as it supported them to see how they could still help with their child's education.

*"Introducing Welsh into the sessions has been a brilliant welcome for families who don't speak Welsh or little ones who will be attending Welsh settings. Picking up a new word or phrase in the settings helps along with the help of the books that we can take home. Claire has been welcoming in every session and my daughter always loves going and singing her Welsh songs along with all the actions."*

*(Parent who attends the pre-school sessions)*

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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Books are given away at family sessions and many families bring them back to swap them. In addition, an old phone box has been stocked with books and the community encouraged to use it and, with a grant from Interlink, 10 little library boxes are being made with the idea that these will be filled with the free reading material and that communities will be able to take and give to the box on a more regular basis, thus reaching a wider audience than those who are able to attend the sessions. The project has linked with Men's Shed Cymru who have so far kindly made two of the little library boxes and are working on the remaining 7 with one having been made by a grandparent at one of the schools.

The project linked with Treorchy Comprehensive School art department where the students are working with the families at the primary schools to create a design unique to their school and draw and paint the boxes. This will also help the 6<sup>th</sup> form students gain their Welsh Bacalaureate for which community hours are needed.

In 2024 Natasha Owen, project leader, developed the approach further, while still keeping a focus on reading, looking at ways to involve families in wider activities. Cooking sessions were set up in partnership with Pentre Comrades Club and families make meals together, reading the recipes and trying new ingredients. Working with Welcome to Our Woods outdoor sessions have been developed for families with under five year olds. A grant from the National Lottery Community Fund enabled People and Work to employ Carmen Todd-Jones to focus on wider aspects of family involvement and promoting outdoor activities. Working with PIAS Lles these have led to a series of Wild Play days. These sessions are usually at the weekend and involve reading a book and exploring nature.

#### **Rhondda Digidol**

Rhondda Digidol is a project based in the Rhondda that has been developed to help tackle issues around digital inclusion. A key factor to the Rhondda Digidol work is working alongside individuals and groups to support them to make the best use of current digital opportunities for friendship, shopping, work, health, education, and communication. The project aids in helping to tackle digital inclusion through the provision of devices, data, and the necessary knowledge to use them effectively.

With funding from Link the project were able to take on two staff members for a year to run events, one-to-one sessions and workshops to support 179 people in Rhondda to access digital technology.

In total, the Rhondda Digidol project has supported 1977 individuals over its three years of funding from the Moondance Foundation. Of these 306 were supported with bespoke one-to-one support and this group is very evenly balanced across age groups. The needs of people for digital inclusion vary but the evaluation of showed that dealing with key activities like booking a doctor's appointment, accessing a bank account or booking tickets was the most common, closely followed by employability, which encompasses digital skills as well as job search and applications .

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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### Outcome met per Rhondda Digidol participant

	2022-23	2023-24	2024-25	Total
Key activities of life	N/A	55	53	108
Learning/ Education	27	8	5	40
Social Connection	10	15	5	30
Employability	28	49	27	104
Advice	7	3	1	11
Other	2	4	8	14

Access to digital technology has also been helped through donating or loaning devices. Through membership of the Good Things Foundation, Rhondda Digidol has been able to give away 172 data pre-loaded sim cards to local people struggling to afford to access the internet. The project also takes in and re-purposes digital devices and has provided 52 notebooks and laptops to local people:

*The borrowed tablet has changed my situation a lot. I no longer have to walk one and a half hours to attend the library to job search every day. (Rhondda Digidol participant)*

Rhondda Digidol will continue to offer digital support to individuals and community organisations and clubs including gaming and coding groups.

### Fit and Well

With funding from the Global Charities Make Some Noise programme and the Shared Prosperity Fund, and working alongside PIAS Lles (see below) which is funded by the National Lottery Community Fund, Fit and Well delivery has worked with schools, community sports clubs, youth services and partners to provide Rhondda people with the opportunity to benefit from the social and health benefits of physical activity. It has also, this year, supported two local people to develop their skills and set up their own fitness enterprises – Active Education CIC and Curl Fitness.

School sessions have included working with a special needs school and primary and secondary schools across Rhondda. Summer programmes have brought the whole Generation Rhondda team together to offer sessions around sports, gaming and crafts.

Walking rugby and football sessions are weekly and tournaments have been arranged for both sports. There are walking groups and a running group that meet weekly. On average the activities involve over 90 people each month.

### PIAS

Established nearly seven years ago, PIAS (Play it Again Sport) takes in donated sports clothing, shoes and equipment and either gives it away or sells it very cheaply to broaden access to physical and wellbeing activities. Any surpluses generated are used to fund activities in Rhondda. In the last year 2200 items have been donated to PIAS and 1500 items have been either given or sold at low cost. Donations from the Cardiff half marathon and from donation bins across Rhondda Cynon Taf have been added to with a new donation bin at Swansea University Sports Village.

'Pop-up' shops have been identified as a good way to generate sales, linking in to activities that partners are planning and using a 'pay as you feel' model. PIAS works with Money Manage Wales to donate any items given which are not sportswear, but which can still be used, to them – filling their need and repurposing excess stock.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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Currently PIAS is being managed by the PIAS Lles leader, Natasha Burnell, and in 2025 the plan is to transfer the initiative to the new Generation Rhondda charity.

### **PIAS Lles**

PIAS Lles is the evolution of the work that PIAS promoted and is funded by the National Lottery Community Fund from February 2023-February 2028. The main targets of this project are:

- Sustainability hubs – support local groups/organisations to promote an awareness of climate change and what people can do to make a difference (support community led activity)
- 50,000 tonnes of sports kit diverted from landfill
- 500 people involved in community wellness (sport, physical movement and well-being)
- 30 local leaders trained and delivering local activities
- 6 monthly local newsletter/reviews – provide a progress report
- Environmental work to support community activity in environment-led and engaging groups and support them in the work they do, and to become self-sufficient (support with bank accounts/getting constituted etc).

Key highlights for this year are:

- engagement with adults has increased by over 100 people
- engagement with children has increased by 200
- the reach to children in schools has increased by over 1000
- Launch of Zero @ The Shack May 2024
- Launch of Siop Y Llyn February 2024
- Festival of Wellbeing in January 2025
- Over £300,000 has been raised with other local organisations to develop their health and wellbeing and environmental provision.

This year PIAS Lles has supported the development of sustainability hubs developed by Pentre Comrades Club (Zero@the Shack) and Cambrian Village Trust (Siop y Llyn).

In January, to coincide with people making their New Year Resolutions, a Wellbeing Festival was run in Rhondda. The idea behind this was three-fold:

1. Promote local businesses and organisations – support them during a typically 'quiet' month by giving them guaranteed business, and the opportunity to reach new groups who might not know about them, or typically engage with them.
2. Support the health and well-being of local people during a notoriously challenging month for people, financially and mentally.
3. Create a large impact event to promote PIAS and increase reach and engagement for all parties involved.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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Over 150 people participated in the Festival in activities including:

- Life drawing
- Pottery
- Canoeing
- Contrast Therapy (sauna & ice baths)
- Meditation
- Mountain Biking
- Money Management
- Yoga

PIAS Lles has worked with the Generation Rhondda project to run some joint activities including outdoor activities with families. It has also run cost of living/sustainability workshops in partnership with Swansea University and Pentre Comrades Club.

### **Evaluation and Research**

People and Work seeks to work with the public and voluntary sectors to provide evaluation and research that can help to improve lives. We focus on qualitative work that meets with the charity's overall objectives and are committed to work that enables clients to develop their work to support people as effectively as possible.

During the last year we have worked on a range of important areas including:

- The evaluation of the Invest Local programme run by Building Communities Trust - <https://www.bct.wales/evaluation?locale=en>
- An evaluation of the Autism Code of Practice - <https://www.gov.wales/evaluation-code-practice-delivery-autism-services>
- A formative evaluability assessment and evaluation of the Young Person's Guarantee for the Welsh Government.
- Meddwl Ymlaen – a five year programme to develop improved support for mental health with young people in Gwynedd and Ynys Môn run by Barnardos
- TAPI – a programme run by GISDA in Gwynedd to support young people
- Dementia support - a coherent approach across five voluntary sector organisations to support people with dementia and their carers led by Age Cymru West Glamorgan;
- Hawlio Heddwch. An evaluation of a programme to celebrate the centenary of a Welsh women's peace petition for Academi Heddwch Cymru.
- Support for North Wales CAMHS to evaluate their School's In-Reach work.

### **Financial review**

The results for People and Work are as shown in the Statement of Financial Activities. The trustees have reviewed the charity's need for reserves in line with guidance issued by the Charity Commission.

#### *Reserves policy*

A policy has been established whereby the unrestricted funds not committed or invested in tangible fixed assets (free reserves) should be between two and three months unrestricted expenditure. At this level, the trustees feel they would be able to continue the current activities of the charity in the event of a significant delay in funding. The policy is reviewed annually against current commitments.

#### *Major risks*

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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### **Structure, governance and management**

The Charity is a company limited by guarantee and does not have any share capital.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Dr C Sophocleous

P G Watkins

G J McHugh

G D Lewis

(Resigned 21 February 2024)

J L Huyton

D J Rees

C B Vallance

R J Thurston

(Appointed 7 October 2024 and resigned 20 December 2024)

### *Recruitment and appointment of trustees*

Unless otherwise determined by a General Meeting, the numbers of the members of the Governing Body shall not be fewer than six or more than thirty. The Governing Body shall from time to time appoint a member of the Governing Body, either to fill a casual vacancy or by way of addition to the Governing Body, provided that the prescribed maximum is not thereby exceeded. Any member so appointed shall retain their office until the next Annual General Meeting, but he or she shall then be eligible for re-election. None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

### *Organisational structure*

Dr Duncan Holtom heads up the research team working with Rhodri Bowen, senior researcher, and Emma Preece.

James Hall retired in 2024

James Watts-Rees leads the Fit and Well school and sports work and leads on the development of Generation Rhondda.

Tomas Jenkins leads the employment programme for Generation Rhondda.

Ethan Jones leads the Rhondda Digidol programme for Generation Rhondda

Natasha Burnell leads on the PIAS and PIAS Lles work.

Natasha Owens leads Reading Rhondda for Generation Rhondda.

Sarah Lloyd-Jones is the director and Company Secretary

Ann Churcher is the administrator.

### *Relationship with related parties*

There are no related parties.

The Trustees' report was approved by the Board of Trustees.

G J McHugh

**Trustee**

7 July 2025

# PEOPLE AND WORK UNIT

## INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE AND WORK UNIT

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I report on the financial statements of the Charity for the year ended 31 December 2024, which are set out on pages 9 to 19.

### **Respective responsibilities of Trustees and examiner**

The Charity's Trustees, who are also the directors of People and Work Unit for the purposes of company law, are responsible for the preparation of the accounts. The 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. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination being a qualified member of the Institute of Chartered Accountants in England and Wales.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission 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 financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, and seeking explanations from you as 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

### **Independent examiner's statement**

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
  - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
  - (ii) to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

P E Lea FCA  
Dorrell Oliver Ltd

Chartered Accountant  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

Dated: 7 July 2025

# PEOPLE AND WORK UNIT

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

**FOR THE YEAR ENDED 31 DECEMBER 2024**

		Unrestricted funds 2024 £	Restricted funds 2024 £	Total 2024 £	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £
	Notes						
<b>Income and endowments from:</b>							
Donations and legacies	3	-	277,830	277,830	-	295,184	295,184
Charitable activities	4	166,708	-	166,708	266,043	-	266,043
Investments	5	7,924	-	7,924	6,054	-	6,054
Other income		-	4,586	4,586	-	3,243	3,243
<b>Total income</b>		<u>174,632</u>	<u>282,416</u>	<u>457,048</u>	<u>272,097</u>	<u>298,427</u>	<u>570,524</u>
<b>Expenditure on:</b>							
Charitable activities	6	204,168	309,383	513,551	212,812	222,818	435,630
<b>Total expenditure</b>		<u>204,168</u>	<u>309,383</u>	<u>513,551</u>	<u>212,812</u>	<u>222,818</u>	<u>435,630</u>
Net gains/(losses) on investments	12	74	-	74	(1,888)	-	(1,888)
<b>Net income/(expenditure) and movement in funds</b>		<u>(29,462)</u>	<u>(26,967)</u>	<u>(56,429)</u>	<u>57,397</u>	<u>75,609</u>	<u>133,006</u>
<b>Reconciliation of funds:</b>							
Fund balances at 1 January 2024		200,760	111,300	312,060	143,363	35,691	179,054
<b>Fund balances at 31 December 2024</b>		<u>171,298</u>	<u>84,333</u>	<u>255,631</u>	<u>200,760</u>	<u>111,300</u>	<u>312,060</u>

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

# PEOPLE AND WORK UNIT

## BALANCE SHEET

AS AT 31 DECEMBER 2024

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		2024		2023	
	Notes	£	£	£	£
<b>Fixed assets</b>					
Investments	14		19,369		17,435
<b>Current assets</b>					
Debtors	15	43,429		28,845	
Cash at bank and in hand		205,305		278,014	
		<u>248,734</u>		<u>306,859</u>	
<b>Creditors: amounts falling due within one year</b>	16	<u>(12,472)</u>		<u>(12,234)</u>	
<b>Net current assets</b>			<u>236,262</u>		<u>294,625</u>
<b>Total assets less current liabilities</b>			<u>255,631</u>		<u>312,060</u>
<b>The funds of the Charity</b>					
Restricted income funds	18		84,333		111,300
Unrestricted funds	19		171,298		200,760
			<u>255,631</u>		<u>312,060</u>

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2024.

The Trustees' acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing accounts which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 7 July 2025

G J McHugh  
Trustee

Company registration number 01809654 (England and Wales)

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2024

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### 1 Accounting policies

#### Charity information

People and Work Unit is a private company limited by guarantee incorporated in England and Wales. The registered office is Unit 1 @Loudon, Plas Iona, Bute Town, Cardiff, CF10 5HW.

#### 1.1 Accounting convention

The financial statements have been prepared in accordance with the Charity's [governing document], the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the Charities SORP "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019). The Charity is a Public Benefit Entity as defined by FRS 102.

The Charity has taken advantage of the provisions in the SORP for charities not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of the Charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors or grantors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

#### 1.4 Incoming resources

Income is recognised when the Charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

#### 1.5 Resources expended

Direct charitable expenditure includes all expenditure directly related to the objects of the charity.

Costs have been apportioned as a percentage of project costs in line with the grant conditions. Salaries have been apportioned on a time basis.

#### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Plant and equipment	25% Straight line
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# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2024

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#### 1 Accounting policies

(Continued)

##### 1.7 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

##### 1.8 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less.

##### 1.9 Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the Charity's balance sheet when the Charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors are recognised at transaction price. Financial liabilities classified as payable within one year are not amortised.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

##### 1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

##### 1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

### 2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

### 3 Grant income

	2024	2023
	£	£
Grants receivable	277,830	295,184
	<u>277,830</u>	<u>295,184</u>
<b>Grants receivable for core activities</b>		
The Rank Foundation	26,580	27,058
Interlink	2,000	-
Pen y Cymoedd	58,306	50,968
Shared Prosper Fund	39,861	57,950
Global Charities	31,277	36,150
Spectrum	500	-
National Lottery Community Fund	78,299	57,021
Moondance Foundation	35,000	35,000
Waterloo Foundation	6,007	5,098
Other	-	25,939
	<u>277,830</u>	<u>295,184</u>

### 4 Charitable activities

	2024	2023
	£	£
Research income	166,708	266,043
	<u>166,708</u>	<u>266,043</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

### 5 Income from investments

	Unrestricted funds 2024 £	Unrestricted funds 2023 £
Interest receivable	7,924	6,054

### 6 Expenditure on charitable activities

	Funded Action Research 2024 £	Research and Evaluation 2024 £	Total 2024 £	Funded Action Research 2023 £	Research and Evaluation 2023 £	Total 2023 £
<b>Direct costs</b>						
Staff costs	263,640	154,438	418,078	194,834	152,859	347,693
Research	-	16,105	16,105	-	30,431	30,431
Project costs	27,798	-	27,798	7,836	-	7,836
Activity and training	-	2,183	2,183	1,639	1,616	3,255
Printing, stationery and advertising	1,066	1,040	2,106	892	415	1,307
Telephone	1,183	916	2,099	876	852	1,728
IT	3,816	3,729	7,545	2,744	3,796	6,540
Sundries	126	597	723	86	374	460
Insurance	1,055	1,426	2,481	1,582	1,156	2,738
Rent	4,500	4,186	8,686	4,500	2,693	7,193
Travel expenses	6,116	1,675	7,791	4,906	1,327	6,233
Interpreters and translators	-	4,293	4,293	-	6,145	6,145
Equipment	83	194	277	2,923	1,468	4,391
Books and subs	-	4,223	4,223	-	1,836	1,836
Administration	-	5,914	5,914	-	5,274	5,274
	<u>309,383</u>	<u>200,919</u>	<u>510,302</u>	<u>222,818</u>	<u>210,242</u>	<u>433,060</u>
<b>Share of support and governance costs (see note 8)</b>						
Support	-	816	816	-	157	157
Governance	-	2,433	2,433	-	2,413	2,413
	<u>309,383</u>	<u>204,168</u>	<u>513,551</u>	<u>222,818</u>	<u>212,812</u>	<u>435,630</u>
<b>Analysis by fund</b>						
Unrestricted funds	-	204,168	204,168	-	212,812	212,812
Restricted funds	309,383	-	309,383	222,818	-	222,818
	<u>309,383</u>	<u>204,168</u>	<u>513,551</u>	<u>222,818</u>	<u>212,812</u>	<u>435,630</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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### 7 Description of charitable activities

#### Funded Action Research

Funded Action Research - Supporting people in education and skills programmes.

#### Research and Evaluation

Commissioned Research and Evaluation - Evaluating and researching as commissioned.

### 8 Support costs allocated to activities

	<b>2024</b>	<b>2023</b>
	£	£
Governance costs	816 2,433	157 2,413
	<u>3,249</u>	<u>2,570</u>
<b>Analysed between:</b>		
Research and Evaluation	<u>3,249</u>	<u>2,570</u>

### 9 Net movement in funds

	<b>2024</b>	<b>2023</b>
	£	£
The net movement in funds is stated after charging/(crediting):		
Fees payable for the independent examination of the charity's financial statements	2,433	2,413
	<u>2,433</u>	<u>2,413</u>

### 10 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

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### 11 Employees

#### Number of employees

The average monthly number of employees during the year was:

	<b>2024</b>	<b>2023</b>
	<b>Number</b>	<b>Number</b>
Project	11	7
Research	4	4
	<u>15</u>	<u>11</u>

#### Employment costs

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Wages and salaries	349,465	293,933
Social security costs	28,679	24,417
Other pension costs	39,934	29,343
	<u>418,078</u>	<u>347,693</u>

There were no employees whose annual remuneration was £60,000 or more.

### 12 Net gains/(losses) on investments

	<b>Unrestricted</b>	<b>Unrestricted</b>
	<b>funds</b>	<b>funds</b>
	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Revaluation of investments	74	(1,888)
	<u>74</u>	<u>(1,888)</u>

### 13 Taxation

The charity is exempt from taxation on its activities because all its income is applied for charitable purposes.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

### 14 Fixed asset investments

	<b>Listed investments £</b>
<b>Cost or valuation</b>	
At 1 January 2024 & 31 December 2024	17,435
<b>Carrying amount</b>	
At 31 December 2024	17,435
At 31 December 2023	17,435

### 15 Debtors

	<b>2024 £</b>	<b>2023 £</b>
<b>Amounts falling due within one year:</b>		
Trade debtors	43,429	28,845

### 16 Creditors: amounts falling due within one year

	<b>2024 £</b>	<b>2023 £</b>
Accruals and deferred income	12,472	12,234

### 17 Retirement benefit schemes

	<b>2024 £</b>	<b>2023 £</b>
<b>Defined contribution schemes</b>		
Charge to profit or loss in respect of defined contribution schemes	39,934	29,343

The Charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the Charity in an independently administered fund.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

### 18 Restricted funds

The restricted funds of the charity comprise the unexpended balances of donations and grants held on trust subject to specific conditions by donors as to how they may be used.

	Movement in funds			Movement in funds			
	Balance at 1 January 2023	Incoming resources	Resources expended	Balance at 1 January 2024	Incoming resources	Resources expended	Balance at 31 December 2024
	£	£	£	£	£	£	£
Project funds	35,691	298,427	(222,818)	111,300	282,416	(309,383)	84,333

### 19 Unrestricted funds

The unrestricted funds of the charity comprise the unexpended balances of donations and grants which are not subject to specific conditions by donors and grantors as to how they may be used. These include designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes.

	At 1 January 2024	Incoming resources	Resources expended	Gains and losses	At 31 December 2024
	£	£	£	£	£
General funds	200,760	174,632	(204,168)	74	171,298
<b>Previous year:</b>	<b>At 1 January 2023</b>	<b>Incoming resources</b>	<b>Resources expended</b>	<b>Gains and losses</b>	<b>At 31 December 2023</b>
	£	£	£	£	£
General funds	143,363	272,097	(212,812)	(1,888)	200,760

### 20 Analysis of net assets between funds

	Unrestricted funds 2024	Restricted funds 2024	Total 2024
	£	£	£
<b>At 31 December 2024:</b>			
Investments	19,369	-	19,369
Current assets/(liabilities)	151,929	84,333	236,262
	171,298	84,333	255,631

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2024

### 20 Analysis of net assets between funds

(Continued)

	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £
<b>At 31 December 2023:</b>			
Investments	17,435	-	17,435
Current assets/(liabilities)	183,325	111,300	294,625
	<u>200,760</u>	<u>111,300</u>	<u>312,060</u>

### 21 Remuneration of key management personnel

The remuneration of key management personnel was as follows:

	2024 £	2023 £
Aggregate remuneration	<u>24,064</u>	<u>22,761</u>

**PEOPLE AND WORK UNIT**

England & Wales - Charity number 515211

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# Accounts

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Charity registration number 511211

Company registration number 01809654 (England and Wales)

**PEOPLE AND WORK UNIT**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2023**

# PEOPLE AND WORK UNIT

## LEGAL AND ADMINISTRATIVE INFORMATION

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<b>Trustees</b>	Dr C Sophocleous P G Watkins G J McHugh G D Lewis J L Huyton D J Rees C B Vallance	(Appointed 5 October 2023)
<b>Secretary</b>	S Lloyd-Jones	
<b>Charity number</b>	511211	
<b>Company number</b>	01809654	
<b>Registered office</b>	Unit 1 @Loudon Plas Iona Bute Town Cardiff CF10 5HW	
<b>Independent examiner</b>	Dorrell Oliver Ltd Linden House Monk Street Abergavenny Monmouthshire NP7 5NF	
<b>Bankers</b>	HSBC Bank plc 1 Bridge Street Newport South Wales NP20 6UT	

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# PEOPLE AND WORK UNIT

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# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT)

*FOR THE YEAR ENDED 31 DECEMBER 2023*

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### Chair's Report

I am writing this in May 2024. The last 12 months have seen People and Work continue to work for the people of Rhondda and with organisations across Wales. We are taking forward the lessons learned from The Llechi Glo a Chefn project, along with the partners. There has also been some important evaluation work done including the ongoing evaluation of the Invest local programme and research into the support needs of disadvantaged young people.

Staff have adjusted to a hybrid work model, between home working and being office based and we have again focused on keeping overhead costs as low as possible. The economic situation is still uncertain. This will impact particularly on the people of Rhondda and on the rest of Wales.

People and Work recognises that employment is the key focus to improve people's life chances. Education, training and support for people to get into the labour market and secure jobs are the key ingredients of our work.

This last year has seen the development of the Rhondda team to the point where they will become fully independent in 2025, launching a new Rhondda owned and led charity designed and implemented by young Rhondda people. Support has been given to the development of the new organisation and will continue, as long as it is requested.

Because of this major development, People and Work will be looking at its future strategy in 2024. The options include focussing on another area of Wales; or focussing on a broader advocacy role. 2024 sees our 40th anniversary as a charity and a lot has been learned in the past 40 years about what works and what doesn't, and what is needed for the future of community development. A big focus going forward will be how we share this experience.

Financially, People and Work has had a good year in both accessing funding and earned income, which has enabled the development of a number of posts, some of which are time limited, enabling young people to gain work experience, including those working in their own community. It is difficult to predict success in obtaining research contracts, though our reputation is good and we have a great team. It remains to be seen how the funding landscape might change.

People and Work also needs to work on its advocacy and information sharing role, in developing relationships with, and persuading other organisations of, what is needed and what works, given its long experience.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019).

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

**FOR THE YEAR ENDED 31 DECEMBER 2023**

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### **Objectives and activities**

The charity's objects are the advancement of education by carrying out and/or assisting in carrying out research and study into social and economic problems for the benefit of the general public; additionally, to promote education in all matters related to community organisations.

People and Work seeks to make a difference through two core functions:

- to promote the value of education and learning (for all age groups) as a tool for tackling inequalities and promoting employment, through a programme of community-based action research projects; and
- to undertake commissioned research and evaluation work for the public and third sectors in Wales addressing inequalities in areas such as education (formal and informal), health and employment.
- People and Work's self-generated action research work is funded through charitable trusts and funds. Earned income comes from commissioned research and evaluation work done for the public and voluntary sectors. Any surplus earned through the research and evaluation contracts goes into action research work that aims to build understanding of effective ways to tackle the causes and effects of poverty, especially in relation to education, health and employment outcomes.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2023

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### **Achievements and performance** **Cenhedlaeth Rhondda Generation**

A core groups of five local residents who have worked for People and Work over a few years have decided to develop their own Rhondda based charity. Their work focuses on working with people in Rhondda to develop all aspects of wellbeing – health, learning, employment and digital inclusion. The plan is to gradually move on from People and Work and already 'shadow' systems have been set up with the group administrator collecting monthly expenses and starting to keep parallel financial records.

As current People and Work project funding comes to an end (mostly by March 2025 although some will go to end of May 2025) the aim is to replace it with funding for the new charity.

The key programmes currently being run are:

#### **Green Light – employment support**

Green Light is funded to work in the Upper Rhondda Valleys by Pen y Cymoedd Community Fund and the team generate its own income to cover additional work in the lower part of the valleys. In 2023, Green Light engaged with over 350 individuals. This support ranges from CV building, job searching, interview preparation, accessing skills and training courses and helping in removing other barriers to employment. Green Light provides employment support to unemployed and employed people. The Green Light project has no criteria for people to engage with the programme and will work with anyone that requires employment support.

During 2023 support from The Rank Foundation enabled Green Light to enrol and fund people onto various courses. These courses include: first aid, food hygiene, sports coaching, and CSCS cards/training. The project worked with a Rhondda based course provider who are very keen on collaborating with charities. They have offered courses at discounted prices and have been very flexible and understanding with those Green Light work with. Additionally, they have offered free resits to those Green Light participants who fail.

Green Light has also been central in creating connections and liaising with local MPs. In November Green Light was approached by a local MP to help with employment support for the international student population in the Rhondda. Green Light had already been working with international students through the Food Banks, and the local MP reached out in hopes that Green Light could aid in CV building, Job searching, and funding courses for the students. Between September and December 2023 Green Light helped 31 international students facing complex issues with employment support. Green Light has continued to liaise with local MPs and aids to feedback community issues regarding employment.

Participants are referred to Green Light through a variety of ways. Most have come through referral through the Job Centre or employment events. Others have been referred to by word of mouth or from external/ partner organisations or social media, and four individuals have been referred to us by local MPs.

#### **Reading Rhondda Darllen**

The Reading Rhondda project was born out of research done by a community member working for People and Work post pandemic. After speaking with family and community members in Rhondda and looking at national statistics she noted the decline in reading and literacy skills in primary aged children. The Reading Rhondda project is funded by Pen y Cymoedd Community Fund and the Waterloo Foundation. aims to bridge this gap by holding sessions with parents/caregivers and children with the emphasis on encouraging reading and literacy at home, as well as providing reading materials for the children involved to access on a regular basis.

The sessions at the schools are focused weekly on a particular book and involve family craft activities linked to the story. Sessions are run in schools and in the community and work with pre-school up to year 6.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2023

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By the end of 2023 Reading Rhondda had an average of 44 families attending sessions every week and was working within 9 primary schools, 2 pre-schools and 2 community settings. In the summer funding was secured from the Shared Prosperity Fund to enable the project to add Welsh medium sessions. This has enabled the project to develop in two Welsh medium schools, particularly valuable as many of the parents/caregivers do not speak Welsh themselves so building their confidence in supporting their child's reading is important. Bi-lingual pre-school sessions are also being run. One parent whose child will attend a Welsh medium school said:

*"Introducing Welsh into the sessions has been a brilliant welcome for families who speak Welsh or little ones who will be attending Welsh settings. Picking up a new word or phrase helps along with the help of the books that we can take home. Claire has been welcoming in every session and my daughter always loves going and singing her Welsh songs along with all the actions". -Reading Rhondda parent.*

The sessions are also valued by the parents/caregivers as valuable time to spend with their child:

*"Me and my son love when Reading Rhondda come to the school. It has made me and my son bond by having time to spend together, it has helped me with my confidence with parenting my son and meeting others. [my child] loves the ladies who run the sessions and on the days they are there he can't wait to go to school when the rest of the time it has been a struggle". - Reading Rhondda parent*

#### **Rhondda Digidol.**

Rhondda Digidol is a project based in the Rhondda that has been developed to help tackle issues around digital inclusion. A key factor to the Rhondda Digidol work is working alongside individuals and groups to support them to make the best use of current digital opportunities for friendship, shopping, work, health, education, and communication. The project aids in helping to tackle digital inclusion through the provision of devices, data, and the necessary knowledge to use them effectively. It has five key objectives:

- Promote digital inclusion in Rhondda;
- Tackle digital exclusion through the provision of devices;
- Reduce data poverty in Rhondda;
- Offer digital support, training and coding opportunities to people in Rhondda; and
- Reduce digital device waste through donations.

In 2023 Link approached Rhondda Digidol about piloting some work to promote digital inclusion, particularly amongst adults and older people. In November two new staff joined Rhondda Digidol funded by Link, and broadened the focus to include working in libraries, care homes and running regular digital events.

One to one support with digital technology was given in the last year to 132 people, of whom 55 were supported with key activities such as banking, doctors appointments and contacting friends; 49 were supported with employability; 15 were supported to make social contacts and others were helped with adult education and children's schoolwork.

In addition to the one to one work that project delivers coding club sessions and has worked with schools to develop a six week coding course. Clubs are run in schools, community venues and libraries. Regular computer gaming clubs are also run offering young people a safe place to come. In partnership with the local authority youth team coding and gaming clubs run in school holidays have worked with 330 young people in the past year.

The project provided 52 people with no access to the internet with sim cards this year. The cards come from the Good Things Foundation and come pre-loaded with data. The project has also encouraged other organisations in Rhondda to access these free sim cards and there are now five places where people can get them, a year ago Rhondda Digidol was the only source. The project has also provided five laptops and 14 tablets to community member this year and recycled surplus equipment from Rhondda Housing Association and local schools.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2023

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#### PIAS Lles

PIAS Lles is the evolution of Play It Again Sport, a People and Work social enterprise run since 2018, and has been funded by the National Lottery from February 2023-February 2028. The main targets of this project are:

- Sustainability hubs – support local groups/organisations to implement 3 over the next five years, to promote an awareness of climate change and what people can do to make a difference (support community led activity)
- 50,000 tonnes of sports kit diverted from landfill
- 500 people involved in community wellness (sport, physical movement and well-being)
- 30 local leaders trained and delivering local activities
- 6 monthly local newsletter/reviews – provide a progress report
- Environmental work to support community activity in environment-led and engaging groups and support them in the work they do, and to become self-sufficient (support with bank accounts/getting constituted etc).

The key theme of PIAS Lles is to encourage community activism to tackle climate change, support the health and well-being in Rhondda communities through the provision of the equipment needed and also providing the activities, and then supporting volunteers in order for these groups to be self-sufficient.

In its first year the programme has supported the development of three sustainability hubs: Y Siop Fach Sero in Ferndale; Siop y Llyn in Clydach Vale; and Pentre Comrades Club. In addition, the programme has worked with Grow Rhondda in Blaenrhondda to develop Y Potyn Bach, a café hoping to develop a stronger focus on sustainability.

#### Fit and Well – PIAS delivery.

The core provision includes weekly sessions:

- Monday running group (beginners/experienced runners, Clydach Vale Athletics Track)
- Tuesday walking group (hyper-local, always in Ynyshir/Porth, no more than 4 miles)
- Wednesday walking group (locations change weekly, distance varies from 3 -6 miles)
- Happy Feet monthly Saturday walking group (locations change, minimum of 8 miles)
- Walking Rugby weekly
- Various ad-hoc activities (YEPS sports sessions, PT sessions etc)

These activities consistently engage with over 90 people monthly.

PIAS Lles has been exploring new developments, including running a community survey in June 2023 to see what activities people wanted to be able to access. In the summer, Shared Prosperity Funding provided for two part-time assistants to help with delivery, one focusing on work with young people and schools, and on walking football and rugby with adults, and one on walking and fitness training. In addition, a trainee with funding from the Rank Foundation has strengthened the team's capacity.

New activities which have been launched include:

- Strength & Balance class (Fridays at Pentre Comrades Club)
- Strength & Balance class (Mondays at Arts Factory)
- Arts session (Tuesdays at St Peter's Church)
- Wednesday walking group (hyper-local, always from Pentre, no more than 3 miles)
- Personal Training Gym Support (Thursdays at Ystrad gym)
- Youth Club gum sessions with YEPS (Mondays in Ynyshir)

This has been an initial trial to see how lower-level physical and well-being activities are received, and so far (they only launched mid-January), the response has been positive, there have been over 60 people engaged with through these additional activities.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

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The project works with schools throughout Rhondda, working with around 210 children and young people a week. One of the SPF funded workers is developing a Community Interest Company in Rhondda to provide sports activities. People and Work have been able to support him to become qualified through the FAW and as a cricket coach and help him create the sports business called Next Level. Next level has been set up to help young people in Rhondda who are unable to play football for a club due to waiting lists, confidence or having difficulties being in groups. Already 30+ have enrolled and the team collaborated with Ton Pentre AFC to create a junior football section from aged 5-11. People and Work will continue to support individuals training to provide access to sports and fitness and help them obtain DBS check.

### Celebrating 40 years

People and Work was launched as an independent charity on April 17th 1984 and this year we are celebrating 40 years in 2024. We are working with partners to develop a series of short papers that capture aspects of what we have learned over these 40 years and we will be sharing these with the wider Welsh voluntary sector and policy makers as the year progresses.

### Talwrn

Talwrn is a partnership of voluntary sector leaders in Wales convened by People and Work. It is an informal group and has continued to provide a valued space for people to talk about their work, its challenges and strengths.

### Evaluation and Research

People and Work earns income from providing evaluation and research support to the public and voluntary sectors in Wales. We focus on qualitative work that meets with the charity's overall objectives and are committed to work that enables clients to develop their work to support people as effectively as possible.

The research and evaluation work has continued to develop and during 2023 and we worked on some key policy areas for the Welsh Government, including:

Rapid Evidence Review: Supporting 'inactive' NEET young people to overcome intersectional barriers to accessing and sustaining their work goals - <https://www.gov.wales/rapid-evidence-review-supporting-young-people-who-are-not-employment-education-or-training>

The evaluation of the Invest Local programme run by Building Communities Trust - <https://www.bct.wales/evaluation?locale=en>

The evaluation of Communities for Work + with Old Bell3 - <https://www.gov.wales/evaluation-communities-work-and-communities-work-plus-stage-1-process-evaluation-and-theory-change>

An evaluation of the Autism Code of Practice - <https://www.gov.wales/evaluation-code-practice-delivery-autism-services>

A formative evaluability assessment of the Young Person's Guarantee.

In addition, in the last year People and Work has provided evaluation support to:

- Age Cymru West Glamorgan who are leading on developing a coherent approach across five voluntary sector organisations to support people with dementia and their carers;
- Barnado's in Gwynedd and Ynys Môn with a five year programme to develop improved support for mental health with young people;
- GISDA in Gwynedd to develop support for young people;
- North Wales CAMHS who are developing their In-Reach to Schools programme

### Financial review

The results for People and Work are as shown in the Statement of Financial Activities. The trustees have reviewed the charity's need for reserves in line with guidance issued by the Charity Commission.

### Reserves policy

A policy has been established whereby the unrestricted funds not committed or invested in tangible fixed assets (free reserves) should be between two and three months unrestricted expenditure. At this level, the trustees feel they would be able to continue the current activities of the charity in the event of a significant delay in funding. The policy is reviewed annually against current commitments.

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## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2023

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#### *Major risks*

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

#### **Structure, governance and management**

The Charity is a company limited by guarantee and does not have any share capital.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Dr C Sophocleous

P G Watkins

G B Davies

(Resigned 6 June 2023)

G J McHugh

G D Lewis

J L Huyton

D J Rees

C B Vallance

(Appointed 5 October 2023)

#### *Recruitment and appointment of trustees*

Unless otherwise determined by a General Meeting, the numbers of the members of the Governing Body shall not be fewer than six or more than thirty. The Governing Body shall from time to time appoint a member of the Governing Body, either to fill a casual vacancy or by way of addition to the Governing Body, provided that the prescribed maximum is not thereby exceeded. Any member so appointed shall retain their office until the next Annual General Meeting, but he or she shall then be eligible for re-election. None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

#### *Organisational structure*

Dr Duncan Holtom heads up the research team working with Rhodri Bowen, senior researcher, and Emma Preece. James Hall is operations manager looking after IT systems, office bases and equipment. He also heads up partnership work.

James Watts-Rees leads the Fit and Well school and sports work and manages Gavin Jenkins and Raylee Caviell; manages Tomas Jenkins and the development of Cenhedlaeth Rhondda Generation.

Tomas Jenkins leads the Green Light programme.

Ethan Jones manages Rhondda Digidol and manages Heather Hansen and Scott Jones

Natasha Burnell leads on social enterprise and environmental sustainability and manages Luca Evans.

Natasha Owens leads Reading Rhondda and manages Claire Davies.

Sarah Lloyd-Jones is the director and works with our Trustees

Ann Churcher is the administrator.

#### *Relationship with related parties*

There are no related parties.

The Trustees' report was approved by the Board of Trustees.

G J McHugh  
Trustee

13 May 2024

# PEOPLE AND WORK UNIT

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF PEOPLE AND WORK UNIT

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I report on the financial statements of the Charity for the year ended 31 December 2023, which are set out on pages 9 to 19.

#### **Respective responsibilities of Trustees and examiner**

The Charity's Trustees, who are also the directors of People and Work Unit for the purposes of company law, are responsible for the preparation of the accounts. The 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. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination being a qualified member of the Institute of Chartered Accountants in England and Wales.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission 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 financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, and seeking explanations from you as 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

#### **Independent examiner's statement**

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
  - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
  - (ii) to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

P E Lea FCA  
Dorrell Oliver Ltd

Chartered Accountant  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

Dated: 13 May 2024

# PEOPLE AND WORK UNIT

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 DECEMBER 2023

		Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds 2022 £	Restricted funds 2022 £	Total 2022 £
	Notes						
<b>Income and endowments from:</b>							
Donations and legacies	3	-	295,184	295,184	-	359,495	359,495
Charitable activities	4	266,043	-	266,043	193,229	-	193,229
Investments	5	6,054	-	6,054	2,082	-	2,082
Other income		-	3,243	3,243	-	20,857	20,857
<b>Total income</b>		<u>272,097</u>	<u>298,427</u>	<u>570,524</u>	<u>195,311</u>	<u>380,352</u>	<u>575,663</u>
<b>Expenditure on:</b>							
Charitable activities	6	212,812	222,818	435,630	154,069	403,776	557,845
<b>Total expenditure</b>		<u>212,812</u>	<u>222,818</u>	<u>435,630</u>	<u>154,069</u>	<u>403,776</u>	<u>557,845</u>
Net gains/(losses) on investments	12	(1,888)	-	(1,888)	(3,585)	-	(3,585)
<b>Net income and movement in funds</b>		<u>57,397</u>	<u>75,609</u>	<u>133,006</u>	<u>37,657</u>	<u>(23,424)</u>	<u>14,233</u>
<b>Reconciliation of funds:</b>							
Fund balances at 1 January 2023		<u>143,363</u>	<u>35,691</u>	<u>179,054</u>	<u>105,706</u>	<u>59,115</u>	<u>164,821</u>
<b>Fund balances at 31 December 2023</b>		<u>200,760</u>	<u>111,300</u>	<u>312,060</u>	<u>143,363</u>	<u>35,691</u>	<u>179,054</u>

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

# PEOPLE AND WORK UNIT

## BALANCE SHEET

AS AT 31 DECEMBER 2023

	Notes	2023		2022	
		£	£	£	£
<b>Fixed assets</b>					
Investments	14		17,435		19,684
<b>Current assets</b>					
Debtors	15	28,845		30,347	
Cash at bank and in hand		278,014		160,826	
		<u>306,859</u>		<u>191,173</u>	
<b>Creditors: amounts falling due within one year</b>	16	<u>(12,234)</u>		<u>(31,803)</u>	
<b>Net current assets</b>			294,625		159,370
<b>Total assets less current liabilities</b>			<u>312,060</u>		<u>179,054</u>
<b>Net assets excluding pension liability</b>			312,060		179,054
			<u><u>          </u></u>		<u><u>          </u></u>
<b>The funds of the Charity</b>					
Restricted income funds	18	111,300		35,691	
Unrestricted funds		200,760		143,363	
		<u>312,060</u>		<u>179,054</u>	
		<u><u>          </u></u>		<u><u>          </u></u>	

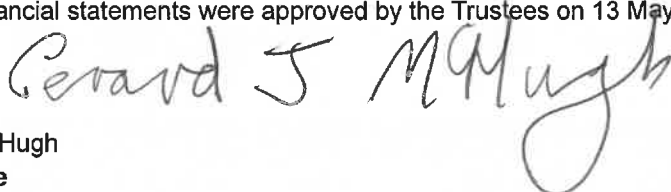
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2023.

The Trustees' acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing accounts which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 13 May 2024

X  X

G J McHugh  
Trustee

Company registration number 01809654 (England and Wales)

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS

### FOR THE YEAR ENDED 31 DECEMBER 2023

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#### 1 Accounting policies

##### Charity information

People and Work Unit is a private company limited by guarantee incorporated in England and Wales. The registered office is Unit 1 @Loudon, Plas Iona, Bute Town, Cardiff, CF10 5HW.

#### 1.1 Accounting convention

The financial statements have been prepared in accordance with the Charity's [governing document], the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the Charities SORP "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019). The Charity is a Public Benefit Entity as defined by FRS 102.

The Charity has taken advantage of the provisions in the SORP for charities not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of the Charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors or grantors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

#### 1.4 Incoming resources

Income is recognised when the Charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

#### 1.5 Resources expended

Direct charitable expenditure includes all expenditure directly related to the objects of the charity.

Costs have been apportioned as a percentage of project costs in line with the grant conditions. Salaries have been apportioned on a time basis.

#### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Plant and equipment	25% Straight line
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# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

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### 1 Accounting policies

(Continued)

#### 1.7 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

#### 1.8 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less.

#### 1.9 Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the Charity's balance sheet when the Charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors are recognised at transaction price. Financial liabilities classified as payable within one year are not amortised.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

#### 1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

#### 1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2023

#### 2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

#### 3 Grant income

	2023	2022
	£	£
Grants receivable	295,184	359,495
<b>Grants receivable for core activities</b>		
The Rank Foundation	27,058	51,465
WCVA Third Sector Resilience Grant Fund	-	40,000
National Lottery Community Fund - Supporting Great Ideas	-	153,027
Pen y Cymoedd	50,968	22,754
Link Scheme Ltd	57,950	-
Global Charities	36,150	-
WCVA DWP Kickstart programme	-	24,697
National Lottery Community Fund - People and Places	57,021	17,052
Moondance Foundation	35,000	35,000
Waterloo Foundation	5,098	15,000
Rhondda Cynon Taff	25,939	-
Other	-	500
	<u>295,184</u>	<u>359,495</u>

#### 4 Charitable activities

	2023	2022
	£	£
Research income	266,043	193,229

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

### 5 Income from investments

	Unrestricted funds 2023 £	Unrestricted funds 2022 £
Interest receivable	6,054	2,082

### 6 Expenditure on charitable activities

	Funded Action Research 2023 £	Research and Evaluation 2023 £	Total 2023 £	Funded Action Research 2022 £	Research and Evaluation 2022 £	Total 2022 £
<b>Direct costs</b>						
Staff costs	194,834	152,859	347,693	238,000	116,847	354,847
Research	-	30,431	30,431	-	8,453	8,453
Project costs	7,836	-	7,836	141,464	-	141,464
Activity and training	1,639	1,616	3,255	95	707	802
Printing, stationery and advertising	892	415	1,307	935	785	1,720
Phone	876	852	1,728	1,284	391	1,675
IT	2,744	3,796	6,540	4,694	3,245	7,939
Sundries	86	374	460	56	683	739
Insurance	1,582	1,156	2,738	1,451	1,284	2,735
Rent	4,500	2,693	7,193	5,875	3,217	9,092
Travel expenses	4,906	1,327	6,233	6,503	550	7,053
Interpreters and translators	-	6,145	6,145	433	6,185	6,618
Equipment	2,923	1,468	4,391	2,986	410	3,396
Books and subs	-	1,836	1,836	-	1,406	1,406
Administration	-	5,274	5,274	-	5,393	5,393
	<u>222,818</u>	<u>210,242</u>	<u>433,060</u>	<u>403,776</u>	<u>149,556</u>	<u>553,332</u>
<b>Share of support and governance costs (see note 8)</b>						
Support	-	157	157	-	2,000	2,000
Governance	-	2,413	2,413	-	2,513	2,513
	<u>222,818</u>	<u>212,812</u>	<u>435,630</u>	<u>403,776</u>	<u>154,069</u>	<u>557,845</u>
<b>Analysis by fund</b>						
Unrestricted funds	-	212,812	212,812	-	154,069	154,069
Restricted funds	222,818	-	222,818	403,776	-	403,776
	<u>222,818</u>	<u>212,812</u>	<u>435,630</u>	<u>403,776</u>	<u>154,069</u>	<u>557,845</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2023

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### 7 Description of charitable activities

#### Funded Action Research

Funded Action Research - Supporting people in education and skills programmes.

#### Research and Evaluation

Commissioned Research and Evaluation - Evaluating and researching as commissioned.

### 8 Support costs allocated to activities

	2023 £	2022 £
Governance costs	157 2,413	2,000 2,513
	<u>2,570</u>	<u>4,513</u>
<b>Analysed between:</b>		
Research and Evaluation	2,570	4,513
	<u>2,570</u>	<u>4,513</u>

### 9 Net movement in funds

	2023 £	2022 £
The net movement in funds is stated after charging/(crediting):		
Fees payable for the independent examination of the charity's financial statements	2,413	2,513
	<u>2,413</u>	<u>2,513</u>

### 10 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2023

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#### 11 Employees

##### Number of employees

The average monthly number of employees during the year was:

	2023 Number	2022 Number
Project	7	8
Research	4	4
	<u>11</u>	<u>12</u>

##### Employment costs

	2023 £	2022 £
Wages and salaries	293,933	291,014
Social security costs	24,417	25,125
Other pension costs	29,343	38,709
	<u>347,693</u>	<u>354,848</u>

There were no employees whose annual remuneration was £60,000 or more.

#### 12 Net gains/(losses) on investments

	Unrestricted funds 2023 £	Unrestricted funds 2022 £
Revaluation of investments	<u>(1,888)</u>	<u>(3,585)</u>

#### 13 Taxation

The charity is exempt from taxation on its activities because all its income is applied for charitable purposes.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2023

### 14 Fixed asset investments

	Listed investments £
<b>Cost or valuation</b>	
At 1 January 2023	19,684
Valuation changes	(2,249)
At 31 December 2023	<u>17,435</u>
<b>Carrying amount</b>	
At 31 December 2023	<u>17,435</u>
At 31 December 2022	<u>19,684</u>

### 15 Debtors

	2023 £	2022 £
<b>Amounts falling due within one year:</b>		
Trade debtors	28,845	30,347
	<u>28,845</u>	<u>30,347</u>

### 16 Creditors: amounts falling due within one year

	2023 £	2022 £
Accruals and deferred income	12,234	31,803
	<u>12,234</u>	<u>31,803</u>

### 17 Retirement benefit schemes

	2023 £	2022 £
<b>Defined contribution schemes</b>		
Charge to profit or loss in respect of defined contribution schemes	29,343	38,709
	<u>29,343</u>	<u>38,709</u>

The Charity operates a defined contribution pension scheme for all qualifying employees. The assets of the scheme are held separately from those of the Charity in an independently administered fund.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2023

#### 18 Restricted funds

The restricted funds of the charity comprise the unexpended balances of donations and grants held on trust subject to specific conditions by donors as to how they may be used.

	Balance at 1 January 2022	Movement in funds		Balance at 1 January 2023	Movement in funds		Balance at 31 December 2023
		Incoming resources	Resources expended		Incoming resources	Resources expended	
	£	£	£	£	£	£	£
Project funds	59,115	380,352	(403,776)	35,691	298,427	(222,818)	111,300

#### 19 Unrestricted funds

The unrestricted funds of the charity comprise the unexpended balances of donations and grants which are not subject to specific conditions by donors and grantors as to how they may be used. These include designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes.

	At 1 January 2023	Incoming resources	Resources expended	Gains and losses	At 31 December 2023
	£	£	£	£	£
General funds	143,363	272,097	(212,812)	(1,888)	200,760
<b>Previous year:</b>	<b>At 1 January 2022</b>	<b>Incoming resources</b>	<b>Resources expended</b>	<b>Gains and losses</b>	<b>At 31 December 2022</b>
	£	£	£	£	£
General funds	105,706	195,311	(154,069)	(3,585)	143,363

#### 20 Analysis of net assets between funds

	Unrestricted funds 2023	Restricted funds 2023	Total 2023
	£	£	£
<b>At 31 December 2023:</b>			
Investments	17,435	-	17,435
Current assets/(liabilities)	183,325	111,300	294,625
	200,760	111,300	312,060

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

### 20 Analysis of net assets between funds

(Continued)

	Unrestricted funds 2022 £	Restricted funds 2022 £	Total 2022 £
<b>At 31 December 2022:</b>			
Investments	19,684	-	19,684
Current assets/(liabilities)	123,679	35,691	159,370
	<u>143,363</u>	<u>35,691</u>	<u>179,054</u>

### 21 Remuneration of key management personnel

The remuneration of key management personnel was as follows:

	2023 £	2022 £
Aggregate remuneration	<u>22,761</u>	<u>44,256</u>

**PEOPLE AND WORK UNIT**

England & Wales - Charity number 515211

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# Accounts

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Charity registration number 511211

Company registration number 01809654 (England and Wales)

**PEOPLE AND WORK UNIT**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

# PEOPLE AND WORK UNIT

## LEGAL AND ADMINISTRATIVE INFORMATION

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**Trustees** Dr C Sophocleous  
P G Watkins  
G B Davies  
J L Huyton  
G J McHugh  
G D Lewis  
D J Rees

**Secretary** S Lloyd-Jones

**Charity number** 511211

**Company number** 01809654

**Registered office** Unit 1 @Loudon  
Plas Iona  
Bute Town  
Cardiff  
CF10 5HW

**Independent examiner** Dorrell Oliver Ltd  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

**Bankers** HSBC Bank plc  
1 Bridge Street  
Newport  
South Wales  
NP20 6UT

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# PEOPLE AND WORK UNIT

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# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT )

**FOR THE YEAR ENDED 31 DECEMBER 2022**

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### Chair's Report

I am writing this in May 2023. The last 12 months have seen People and Work get back to relative normality, working for the people of The Rhondda and with organisations across Wales. The Llechi Glo a Chefn project, which stretched through Wales and covered 9 projects, has been successfully completed. Taking forward lessons learned will form part of the future workload.

Where appropriate staff have embraced a hybrid work model, between home working and being office based, but this is less feasible for community work and we have occupied a new office in Pentre, Rhondda in addition to our base in Cardiff.

The economic situation is still uncertain, particularly in relation to food, clothing and energy inflation. This will impact particularly on the people of Rhondda where food and heating take up a higher proportion of household budgets. It must be recognised that there will be a fallout in terms of business failures, unemployment and, particularly, in available employment opportunities, especially for young people.

People and Work recognises that employment is the key focus to improve people's life chances. Education, training and support for people to get into the labour market and secure jobs are the key ingredients of our work. This last year has seen the development of projects designed and implemented by Rhondda people and this will constitute a key component of our future way of working. Cenhedlaeth Rhondda is the current name of the anchor organisation which will be the key organisation delivering projects. It will be a long term project requiring extensive planning and support but funding is in place to enable this.

Financially, People and Work has had a good year in accessing funding which has enabled the development of a number of posts, admittedly all temporary, but enabling young people to gain work experience working in the community. It is difficult to predict success in obtaining research contracts though our reputation is good and we have a great team. It remains to be seen how the funding landscape might change.

People and Work also needs to work on its lobbying role, in developing relationships with, and persuading other organisations of, what is needed and what works, given its long experience.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

### Objectives and activities

The charity's objects are the advancement of education by carrying out and/or assisting in carrying out research and study into social and economic problems for the benefit of the general public; additionally, to promote education in all matters related to community organisations.

People and Work seeks to make a difference through two core functions:

- to promote the value of education and learning (for all age groups) as a tool for tackling inequalities and promoting employment, through a programme of community-based action research projects; and
- to undertake commissioned research and evaluation work for the public and third sectors in Wales addressing inequalities in areas such as education (formal and informal), health and employment.

People and Work's self-generated action research work is funded through charitable trusts and funds. Earned income comes from commissioned research and evaluation work done for the public and voluntary sectors. Any surplus earned through the research and evaluation contracts goes into action research work that aims to build understanding of effective ways to tackle the causes and effects of poverty, specially in relation to education, health and employment outcomes.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

### FOR THE YEAR ENDED 31 DECEMBER 2022

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#### **Achievements and performance**

In 2022 Wales was starting its recovery from the COVID-19 pandemic. People and Work were very lucky to secure recovery support via the WCVA from the Third Sector Resilience Fund Phase 3 which supported core costs relating to our project work. We have been able to continue our focus on investing in local people to enable them to devise and deliver work in their own communities, especially in Rhondda through support from the Rank Foundation, the Kickstart programme and funding from the Pen y Cymoedd Wind Farm Community Fund. During 2022 we were able to take on nine trainees from Rhondda to work with our local core team of five and expanded the employment, health and fitness and sustainability focuses to include working with families to support their children's reading.

2022 also saw the completion of the Llechi, Glo a Chefn Gwlad programme where People and Work coordinated a partnership of nine Welsh organisations – three from the former slate quarries of Gwynedd; three from the agricultural heartlands of Wales; and three from the former coalfields. This work has explored how local communities can be both core to and promote very local economies and the value of investing in local people as community leaders. Twenty-seven community members in the nine areas of the partnership have had a high quality employment experience over 12 months with training and support.

#### ***Cenhedlaeth Rhondda***

Ideas have firmed up during 2022 for the development of an independent 'anchor' organisations for Rhondda that would take over the programmes being run by People and Work and provide support to other groups and organisations in the two Rhondda Valleys by offering support to raise funding, help with structures and organisation and collaboration to build capacity. The local team in Rhondda visited partners in North Wales in the summer of 2022 and came back inspired with many ideas of how they could support their community.

The idea is to develop and set up the new anchor organisation by May 2025 and, in the meantime, to work with people locally to build involvement and ownership.

The key programmes currently being run are:

**Green Light** employment support. This programme has worked with nearly 200 people in the last year to help them to access work or better work. Some of them are referred by local Job Centres or Communities for Work and some refer themselves or are found through other programmes. The programme works alongside people to help them look for work, apply, gain skills and qualifications and improve their prospects. In 2022 this work was part-funded by Pen y Cymoedd Wind Farm Community Fund.

**Rhondda Digidol.** This programme focuses on digital inclusion working across all generations to build confidence and skills in using devices and getting online. The programme runs coding clubs, supports gaming groups, provides free sim cards with pre-loaded data, lends devices including new or reconditioned laptops and tablets, helps community groups develop an online presence including building a website, offers online workshops that take people through how to safely use devices and gives one to one tuition to people new to going online. In 2022 the programme worked with over 500 people in Rhondda. This work is funded by the Moondance Foundation.

**Reading Rhondda.** This programme grew from a concern that children had fallen behind in reading as a result of the pandemic. The programme works from the basis that the majority of learning happens in the home and so it supports parents, grandparents and other caregivers to help their children's reading. The programme works with schools, youthclubs, mother and baby groups and other community initiatives to run reading and craft sessions and works with around 80 families every week. Volunteers are encouraged to get involved from parents reading the stories to volunteers helping to organise sessions.

**PIAS social enterprise.** The social enterprise re-sells donated sports clothing and equipment and has struggled to make a comeback after sales were hit by the pandemic. PIAS had to leave Too Good to Waste – a social enterprise that was hosting its sales-point – because turnover was so low and during 2022 it launched its online sales facility. This has been slow to take off but new outlets have been found including a High Street shopfront owned by RHA Wales in Treorchy and, in early 2023 Y Siop Fach Sero was opened by a community group supported by the PIAS manager in Ferndale. This zero waste shop is a sustainability hub for the Rhondda Fach, one of three to be developed by **PIAS Lles** – a development that has come out of PIAS which was launched in early 2023 and is funded by the National Lottery Community Fund.

**Fit and Well** – PIAS delivery. A wide range of community activities are run weekly including walking and running groups, walking football and rugby, team game activities for children and young people and environmental programmes. Over 150 people each week are involved with activities run by the team.

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2022

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#### Working with the Welsh Voluntary Sector

##### *Llechi, Glo a Chefn Gwlad*

People and Work has continued to coordinate an all Wales project, Llechi, Glo a Chefn Gwlad, involving a partnership nine organisations - Cwmni Bro Ffestiniog, Partneriaeth Ogwen and Siop Griffiths from the slate valleys of North Wales; Tir Coed, Tir Dewi and Credu who work with woodland and land management, farmers and carers respectively; and Ynysybwl Regeneration Partnership, DOVE and People and Work's Rhondda project in the former South Wales coalfield. The partnership is focused on the role of community in supporting and growing the foundational economy and each partner is funded to employ a leader from their community for a year to help them develop community involvement, repeated over three years. Whilst each partner is different the group have valued commonalities and the effectiveness of the network in promoting shared learning and support has been significant. In 2022 the group were able to meet face to face twice with a visit to the North Wales partners and one to Credu Carers in Welshpool and to Tir Coed in Aberystwyth.

The final report is available on the Talwrn website [Slate, Coal and Countryside - Talwrn](#) and a film made by the evaluators Y Canolfan Cynllunio Iaith is available on You-Tube <https://youtu.be/KiGUhyLICyA>.

##### *Talwrn*

Talwrn is a partnership of voluntary sector leaders in Wales convened by People and Work. It is an informal group and during 2022 decided to continue to meet online (before the pandemic meetings were always face to face) with one face to face meeting a year. The meetings provide an opportunity for sharing learning and ideas, peer support and challenge and collaborative working. The members include people who work across Wales as well as those working at a county or regional level and other at a single community level and this mix, combined with the fact that the type of work done varies widely, offers members some valuable insights.

#### Evaluation and Research

People and Work earns income from providing evaluation and research support to the public and voluntary sectors in Wales. We focus on qualitative work that meets with the charity's overall objectives and are committed to work that enables clients to develop their work to support people as effectively as possible.

The research and evaluation work has continued to develop and during 2022 we worked on some key policy areas for the Welsh Government, including a [Review of the Demand, Capacity and Design of Neurodevelopmental services](#), evaluation of the PACE and Communities For Work programmes, and continued a 10 year evaluation of the Invest Local programme for the Building Communities Trust [An Evaluation of Invest Local](#). People and Work provided evaluation support in 2022 to locally led employment support programmes including the Journey to Work and Skills at Work programmes led by Newport County Council; the Expanding Môn's Horizons programme led by Môn CF; and the Sgiliau programme in Blaenau Gwent. People and Work's support for third sector work includes, in 2022, providing evaluation support to Age Cymru Powys and Care and Repair Powys for the Mamwlad project, working with older farmers; evaluation of support for older people coming out of hospital for Age Cymru West Glamorgan and research for GISDA in North Wales, a homelessness and training charity.

#### Financial review

The results for People and Work are as shown in the Statement of Financial Activities. The trustees have reviewed the charity's need for reserves in line with guidance issued by the Charity Commission. A policy has been established whereby the unrestricted funds not committed or invested in tangible fixed assets (free reserves) should be between two and three months unrestricted expenditure. At this level, the trustees feel they would be able to continue the current activities of the charity in the event of a significant delay in funding. The policy is reviewed annually against current commitments

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2022

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#### Structure, governance and management

The Charity is a company limited by guarantee and does not have any share capital.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Dr C Sophocleous

P G Watkins

G B Davies

J L Huyton

G J McHugh

G D Lewis

M McKibben

D J Rees

(Resigned 1 August 2022)

Unless otherwise determined by a General Meeting, the numbers of the members of the Governing Body shall not be fewer than six or more than thirty. The Governing Body shall from time to time appoint a member of the Governing Body, either to fill a casual vacancy or by way of addition to the Governing Body, provided that the prescribed maximum is not thereby exceeded. Any member so appointed shall retain their office until the next Annual General Meeting, but he or she shall then be eligible for re-election. None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Dr Duncan Holtom heads up the research team working with Rhodri Bowen, senior researcher, and Emma Preece.

James Hall is operations manager looking after IT systems, office bases and equipment. He also heads up partnership work.

James Watts-Rees manages the Green Light programme with Tomas Jenkins.  
Ethan Jones manages Rhondda Digidol

Natasha Burnell leads on social enterprise and environmental sustainability and manages Natasha Owens and Reading Rhondda.

Sarah Lloyd-Jones is the director and works with our Trustees  
Ann Churcher is the administrator.

There are no related parties.

**PEOPLE AND WORK UNIT**

**TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))  
FOR THE YEAR ENDED 31 DECEMBER 2022**

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The Trustees' report was approved by the Board of Trustees.



**G J McHugh**  
Trustee  
Dated: 17 May 2023

# PEOPLE AND WORK UNIT

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF PEOPLE AND WORK UNIT

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I report on the financial statements of the Charity for the year ended 31 December 2022, which are set out on pages 7 to 16.

#### **Respective responsibilities of Trustees and examiner**

The Charity's Trustees, who are also the directors of People and Work Unit for the purposes of company law, are responsible for the preparation of the accounts. The 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. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination being a qualified member of the Institute of Chartered Accountants in England and Wales.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission 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 financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, and seeking explanations from you as 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

#### **Independent examiner's statement**

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
  - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
  - (ii) to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

P E Lea FCA  
Dorrell Oliver Ltd

Chartered Accountant  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

Dated: 17 May 2023

## PEOPLE AND WORK UNIT

### STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 DECEMBER 2022

	Notes	Unrestricted funds 2022 £	Restricted funds 2022 £	Total 2022 £	Unrestricted funds 2021 £	Restricted funds 2021 £	Total 2021 £
<b>Income and endowments from:</b>							
Donations and legacies	3	-	359,495	359,495	-	303,935	303,935
Charitable activities	4	193,229	-	193,229	217,944	-	217,944
Investments	5	2,082	-	2,082	3,292	-	3,292
Other income		-	20,857	20,857	-	14,230	14,230
<b>Total income</b>		<b>195,311</b>	<b>380,352</b>	<b>575,663</b>	<b>221,236</b>	<b>318,165</b>	<b>539,401</b>
<b>Expenditure on:</b>							
Charitable activities	6	154,069	403,776	557,845	193,267	329,548	522,815
Net gains/(losses) on investments	11	(3,585)	-	(3,585)	(592)	-	(592)
<b>Net movement in funds</b>		<b>37,657</b>	<b>(23,424)</b>	<b>14,233</b>	<b>27,377</b>	<b>(11,383)</b>	<b>15,994</b>
Fund balances at 1 January 2022		105,706	59,115	164,821	78,329	70,498	148,827
<b>Fund balances at 31 December 2022</b>		<b>143,363</b>	<b>35,691</b>	<b>179,054</b>	<b>105,706</b>	<b>59,115</b>	<b>164,821</b>

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# PEOPLE AND WORK UNIT

## BALANCE SHEET

AS AT 31 DECEMBER 2022

	Notes	2022 £	£	2021 £	£
<b>Fixed assets</b>					
Investments	13		19,684		23,269
<b>Current assets</b>					
Debtors	14	30,347		21,723	
Cash at bank and in hand		160,826		144,340	
		<u>191,173</u>		<u>166,063</u>	
<b>Creditors: amounts falling due within one year</b>	15	<u>(31,803)</u>		<u>(24,511)</u>	
Net current assets			<u>159,370</u>		<u>141,552</u>
<b>Total assets less current liabilities</b>			<u>179,054</u>		<u>164,821</u>
<b>Income funds</b>					
Restricted funds	16		35,691		59,115
Unrestricted funds			143,363		105,706
			<u>179,054</u>		<u>164,821</u>

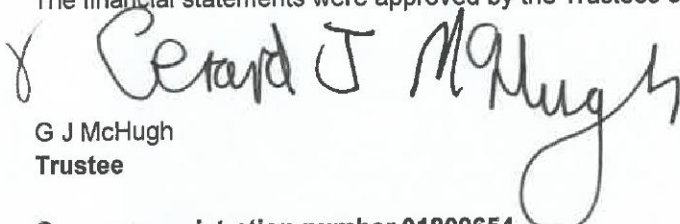
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2022.

The Trustees' acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing accounts which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 17 May 2023

  
G J McHugh  
Trustee

Company registration number 01809654

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS

**FOR THE YEAR ENDED 31 DECEMBER 2022**

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### 1 Accounting policies

#### Charity information

People and Work Unit is a private company limited by guarantee incorporated in England and Wales. The registered office is Unit 1 @Loudon, Plas Iona, Bute Town, Cardiff, CF10 5HW.

#### 1.1 Accounting convention

The financial statements have been prepared in accordance with the Charity's [governing document], the Companies Act 2006, FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the Charities SORP "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (effective 1 January 2019). The Charity is a Public Benefit Entity as defined by FRS 102.

The Charity has taken advantage of the provisions in the SORP for charities not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of the Charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

#### 1.4 Incoming resources

Income is recognised when the Charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

#### 1.5 Resources expended

Direct charitable expenditure includes all expenditure directly related to the objects of the charity.

Costs have been apportioned as a percentage of project costs in line with the grant conditions. Salaries have been apportioned on a time basis.

#### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Plant and equipment	25% Straight line
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# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2022

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### 1 Accounting policies

(Continued)

#### 1.7 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

#### 1.8 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less.

#### 1.9 Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the Charity's balance sheet when the Charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors are recognised at transaction price. Financial liabilities classified as payable within one year are not amortised.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

#### 1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

#### 1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2022

#### 2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

#### 3 Grant income

	2022	2021
	£	£
Grants receivable	359,495	303,935
<b>Grants receivable for core activities</b>		
The Rank Foundation	51,465	59,450
WCVA Third Sector Resilience Grant Fund	40,000	-
National Lottery Community Fund - Supporting Great Ideas	153,027	149,632
Pen y Cymoedd	22,754	-
Postcode Community	-	10,500
National Lottery Community Fund - sustainability	-	2,600
WCVA DWP Kickstart programme	24,697	17,361
National Lottery Community Fund - People and Places	17,052	33,532
Moondance Foundation	35,000	28,500
Waterloo Foundation	15,000	-
Other	500	2,360
	<u>359,495</u>	<u>303,935</u>

#### 4 Charitable activities

	2022	2021
	£	£
Research income	<u>193,229</u>	<u>217,944</u>

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2022

#### 5 Investments

	Unrestricted funds	Unrestricted funds
	2022	2021
	£	£
Interest receivable	2,082	3,292

#### 6 Charitable activities

	Funded Action Research 2022 £	Research and Evaluation 2022 £	Total 2022 £	Funded Action Research 2021 £	Research and Evaluation 2021 £	Total 2021 £
Staff costs	238,000	116,847	354,847	179,858	121,735	301,593
Research	-	8,453	8,453	-	25,459	25,459
Project costs	141,464	-	141,464	131,488	-	131,488
Activity and training	95	707	802	1,000	322	1,322
Printing, stationery and advertising	935	785	1,720	262	1,841	2,103
Phone	1,284	391	1,675	1,244	1,283	2,527
IT	4,694	3,245	7,939	4,156	10,056	14,212
Sundries	56	683	739	16	309	325
Insurance	1,451	1,284	2,735	2,043	1,855	3,898
Rent	5,875	3,217	9,092	5,375	7,317	12,692
Travel expenses	6,503	550	7,053	2,742	113	2,855
Interpreters and translators	433	6,185	6,618	-	8,063	8,063
Equipment	2,986	410	3,396	1,214	4,378	5,592
Books and subs	-	1,406	1,406	150	2,118	2,268
Administration	-	5,393	5,393	-	4,969	4,969
	<u>403,776</u>	<u>149,556</u>	<u>553,332</u>	<u>329,548</u>	<u>189,818</u>	<u>519,366</u>
Share of support costs (see note 8)	-	2,000	2,000	-	1,036	1,036
Share of governance costs (see note 8)	-	2,513	2,513	-	2,413	2,413
	<u>403,776</u>	<u>154,069</u>	<u>557,845</u>	<u>329,548</u>	<u>193,267</u>	<u>522,815</u>
<b>Analysis by fund</b>						
Unrestricted funds	-	154,069	154,069	-	193,267	193,267
Restricted funds	403,776	-	403,776	329,548	-	329,548
	<u>403,776</u>	<u>154,069</u>	<u>557,845</u>	<u>329,548</u>	<u>193,267</u>	<u>522,815</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

#### 7 Description of charitable activities

##### Funded Action Research

Funded Action Research - Supporting people in education and skills programmes.

##### Research and Evaluation

Commissioned Research and Evaluation - Evaluating and researching as commissioned.

#### 8 Support costs

	Support costs	Governance costs	2022	Support costs	Governance costs	2021
	£	£	£	£	£	£
Bank Charges	2,000	-	2,000	1,036	-	1,036
Accountancy	-	2,513	2,513	-	2,413	2,413
	<u>2,000</u>	<u>2,513</u>	<u>4,513</u>	<u>1,036</u>	<u>2,413</u>	<u>3,449</u>
Analysed between Charitable activities	<u>2,000</u>	<u>2,513</u>	<u>4,513</u>	<u>1,036</u>	<u>2,413</u>	<u>3,449</u>

#### 9 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2022

#### 10 Employees

##### Number of employees

The average monthly number of employees during the year was:

	2022 Number	2021 Number
Project	8	7
Research	4	4
	<u>12</u>	<u>11</u>

##### Employment costs

	2022 £	2021 £
Wages and salaries	291,014	256,554
Social security costs	25,125	16,124
Other pension costs	38,709	28,915
	<u>354,848</u>	<u>301,593</u>

There were no employees whose annual remuneration was £60,000 or more.

#### 11 Net gains/(losses) on investments

	Unrestricted funds	Unrestricted funds
	2022 £	2021 £
Revaluation of investments	<u>(3,585)</u>	<u>(592)</u>

#### 12 Taxation

The charity is exempt from tax on income and gains falling within section 505 of the Taxes Act 1988 or section 252 of the Taxation of Chargeable Gains Act 1992 to the extent that these are applied to its charitable objects.

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2022

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#### 13 Fixed asset investments

	Listed investments £
<b>Cost or valuation</b>	
At 1 January 2022	23,269
Valuation changes	(3,585)
At 31 December 2022	<u>19,684</u>
<b>Carrying amount</b>	
At 31 December 2022	<u>19,684</u>
At 31 December 2021	<u>23,269</u>

#### 14 Debtors

	2022 £	2021 £
<b>Amounts falling due within one year:</b>		
Trade debtors	30,347	21,723
	<u>30,347</u>	<u>21,723</u>

#### 15 Creditors: amounts falling due within one year

	2022 £	2021 £
Accruals and deferred income	31,803	24,511
	<u>31,803</u>	<u>24,511</u>

**PEOPLE AND WORK UNIT**

England & Wales - Charity number 515211

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# Accounts

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Charity registration number 511211

Company registration number 01809654 (England and Wales)

**PEOPLE AND WORK UNIT**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2021**  
**PAGES FOR FILING WITH REGISTRAR**

# PEOPLE AND WORK UNIT

## LEGAL AND ADMINISTRATIVE INFORMATION

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<b>Trustees</b>	Dr C Sophocleous P G Watkins G B Davies J L Huyton G J McHugh G D Lewis M McKibben D J Rees	(Appointed 1 February 2021) (Appointed 1 March 2021) (Appointed 1 February 2021)
<b>Secretary</b>	S Lloyd-Jones	
<b>Charity number</b>	511211	
<b>Company number</b>	01809654	
<b>Registered office</b>	Unit 1 @Loudon Plas Iona Bute Town Cardiff CF10 5HW	
<b>Independent examiner</b>	Dorrell Oliver Ltd Linden House Monk Street Abergavenny Monmouthshire NP7 5NF	
<b>Bankers</b>	HSBC Bank plc 1 Bridge Street Newport South Wales NP20 6UT	

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# PEOPLE AND WORK UNIT

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# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT )

**FOR THE YEAR ENDED 31 DECEMBER 2021**

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### Chair's Report

I am writing this in May 2022. The last 12 months have been unprecedented, tragic for some. Throughout this period People and Work has continued to work for the people of The Rhondda and across Wales, though face to face contact has been limited, with certain projects affected more. Staff have embraced the working from home model, though we are moving towards a hybrid work model to enable staff to fully operate and develop. We are now in a far better place in terms of the vaccine and covid infection rates and it is hoped that this improvement will continue.

The economic situation is uncertain, but particularly troubling, with the prospect of 10% inflation, rocketing fuel bills and low growth in the economy. This will impact particularly on the people of The Rhondda where food and heating take up a higher proportion of household budgets. It must be recognised that there will be a fallout in terms of business failures, unemployment and particularly in available employment opportunities, especially for young people.

People and Work recognises that employment is the key focus to improve people's life chances. Education, training and support for people to get into the labour market and secure jobs are the key ingredients of our work. This last year has seen the development of projects designed by and implemented by Rhondda people and this will constitute a key component of our future way of working.

Financially, People and Work is in a satisfactory position at this point, with enough funding sources and research contracts secured for the short term. It remains to be seen how the funding landscape might change. People and Work also needs to work on its lobbying role, in developing relationships with, and persuading other organisations of, what is needed and what works, given its long experience.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

### Objectives and activities

The charity's objects are the advancement of education by carrying out and/or assisting in carrying out research and study into social and economic problems for the benefit of the general public; additionally, to promote education in all matters related to community organisations.

People and Work seeks to make a difference through two core functions:

- to promote the value of education and learning (for all age groups) as a tool for tackling inequalities and promoting employment, through a programme of community-based action research projects; and
- to undertake commissioned research and evaluation work for the public and third sectors in Wales addressing inequalities in areas such as education (formal and informal), health and employment.

People and Work's self-generated action research work is funded through charitable trusts and funds. Earned income comes from commissioned research and evaluation work done for the public and voluntary sectors. Any surplus earned through the research and evaluation contracts goes into action research work that aims to build understanding of effective ways to tackle the causes and effects of poverty, especially in relation to education, health and employment outcomes.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

**FOR THE YEAR ENDED 31 DECEMBER 2021**

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### **Achievements and performance**

Much of the work done in 2021 was, again, shaped by the restrictions necessary to control the COVID-19 pandemic. The restrictions have forced new ways of working and created new needs and People and Work has continued to adapt to do the best that it could to work effectively.

### ***Cenhedlaeth Rhondda***

People and Work have spent 2021 working with people in the Rhondda Valleys to develop a new way of working that focuses on identifying and supporting leadership in the community and helping community leaders to work with the people around them. The work uses a concept of 'alongsidedness' to provide people from the community with training, good networks and support so that they can work within their community to develop its strengths and overcome barriers to thriving. People and Work's role is to support these leaders to build their skills and knowledge so that they can be effective in their community.

Throughout 2021 we focused on building leadership capacity through traineeships, work placements and pilot programmes, in preparation for developing a new five year programme. People and Work created traineeships for six community leaders in 2021, three of these supported by the Rank Foundation. These were young people whose entry into the labour market has been delayed or restricted by the pandemic, and were either unemployed or significantly under-employed. Five were given trainee opportunities, two for a year and three through the Kickstart programme's six month placements and the sixth completed his traineeship and was kept on to deliver the project he had developed. All these young people were from Rhondda and have brought their experiences and thinking into developing the new programme, called Cenhedlaeth Rhondda. This is a programme for building on the strengths of Rhondda and is focused on employment and skills, education and learning, health and wellbeing and protecting the environment.

Throughout 2021 the whole Rhondda team has worked very hard to compensate for the restrictions in face to face work, developing digital solutions to social isolation and offering opportunities for outdoor team and group activities like Walking Rugby, walking and running groups and 'Healthy Hillside' outdoor work.

The PIAS social enterprise, which re-sells donated sports clothing and equipment, was badly hit by the pandemic as it lost both its sales outlets and its collection points, and its income from sales dropped from over £11,500 in 2019 the less than £2000 in 2021. The manager, Natasha Burnell, was able to secure some funding from the Postcode Lottery which ensured that the provision of fitness and wellbeing activities could continue despite the loss of income. PIAS works with over 100 people a week from adult walking groups to after school fitness activities and runs group activities in school holidays. In addition, PIAS has already diverted over 12,000 units from landfill, has an electric vehicle available to transport people to activities, paid for the installation of a charging point in a leisure centre carpark in Rhondda and is now collaborating with a newly established CiC, Y Siop Fach Sero, which is opening a zero waste shop in Ferndale, with PIAS as a tenant. Natasha has also worked with partners on starting a Benthg Library of Things in Rhondda, where people can borrow tools and equipment, and a Repair Café.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

### FOR THE YEAR ENDED 31 DECEMBER 2021

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The Rhondda Web programme focusing on digital inclusion has developed its coding clubs across Rhondda and is also tackling digital exclusion. People and Work is now one of three centres in the UK Network of Online Centres developed by the Good Things Foundation. This means we are part of the National Data-bank which has supplied free data cards to help tackle data poverty. Taking its model from PIAS, the PIAT (Play it Again Tech) project aims to help people who have no access to IT equipment by refurbishing and loaning or giving out donated IT equipment, an approach tested by a pilot which is being developed in 2022. Between 2020 and 2021 the digital inclusion project worked with over 500 people including 20 groups in 15 locations in Rhondda. In early 2022 funding for a further 3 years was secured from the Moondance Foundation for Rhondda Digidol, and a year from the Rank Foundation for the equipment refurbishment work.

The Green Light project developed during the pandemic to help people who had lost their jobs, or saw no way out of unemployment or poor work. It provides very personal employment support through helping people think through their options, prepare a CV, learn about applying online, access qualifications and see what local jobs are available. In the last year the project team (James Watts-Rees, Tomas Jenkins and RAP trainee Michael Goodwin) have worked with over 100 people, and 70 of those intensively. Funding from Confused.Com provided a budget for support activities and enabled People and Work to retain Tomas when his traineeship (supported by the Rank Foundation) ended. Most of those supported found employment and others were supported to gain new qualifications.

#### **Working with the Welsh Voluntary Sector**

##### ***Llechi, Glo a Chefn Gwlad***

People and Work has continued to coordinate an all Wales project, Llechi, Glo a Chefn Gwlad, involving a partnership nine organisations - Cwmni Bro Ffestiniog, Partneriaeth Ogwen and Siop Griffiths from the slate valleys of North Wales; Tir Coed, Tir Dewi and Credu who work with woodland and land management, farmers and carers respectively; and Ynysybwll Regeneration Partnership, DOVE and People and Work's Rhondda project in the former South Wales coalfield. The partnership is focused on the role of community in supporting and growing the foundational economy and each partner is funded to employ a leader from their community for a year to help them develop community involvement, repeated over three years. Whilst each partner is different the group have valued commonalities and the effectiveness of the network in promoting shared learning and support has been significant. In 2021 the group were able to meet face to face for the first time (the project started at the beginning of 2020) and a visit to the South Wales partners was a very positive experience for the whole group. The community leaders worked with over 1000 people in 2021.

##### ***Talwrn***

Talwrn is a partnership of voluntary sector leaders in Wales convened by People and Work. It is an informal group and during 2021 four online meetings were run with an average attendance of eight. The meetings provide an opportunity for sharing learning and ideas, peer support and challenge and collaborative working. The members include people who work across Wales as well as those working at a county or regional level and other at a single community level and this mix, combined with the fact that the type of work done varies widely, offers members some valuable insights.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2021

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### Evaluation and Research

People and Work earns income from providing evaluation and research support to the public and voluntary sectors in Wales. We focus on qualitative work that meets with the charity's overall objectives and are committed to work that enables clients to develop their work to support people as effectively as possible.

#### ***Evaluation and research for the Voluntary Sector in Wales***

We continue to provide evaluation support to the Invest Local programme run by Building Communities Trust (BCT). Starting in 2017 we are working over 10 years with BCT to support the 13 communities in the programme to capture the learning from the support and investment (£1million per community) that they are accessing. We have been looking at the impact of the pandemic on the communities over 2021.

We published a report of some joint research commissioned by the Llechi, Glo a Chefn Gwlad project and Building Communities Trust on the role that community initiatives played in tackling the impact of the first lockdown of the pandemic

[A Community response to covid-19 \(squarespace.com\)](https://www.squarespace.com).

We are also providing evaluation support to Care and Repair Powys and Age Cymru Powys for their Mamwlad project, that targets support at farming families in Powys.

We provided evaluation support to Age Cymru West Glamorgan for a project around home help for older people and evaluations or research for Interlink (the association of voluntary organisations in Rhondda Cynon Taf); the CGL ACE programme that focuses on supporting people from minority ethnic communities into work; and Spectacle Theatre in Rhondda.

People and Work did research for Adult Learning Wales on the people who undertake adult learning and its impact on them and at the end of 2021 People and Work was commissioned by AVOW (Association of Voluntary Organisations Wrexham) to research community based food initiatives in Wrexham, looking at how things were changing at the end of the pandemic and plans for the future.

#### ***Working with the Public Sector in Wales***

In 2021 People and Work continued evaluations of three ESF funded programmes run by Welsh local authorities to support people in, or into, work:

- In Ynys Môn the Expanding Môn's Horizon's programme targets people who are in low skilled or insecure work to build on their skills and find better work;
- Skills @Work is an anti-poverty programme working in Cardiff, Newport and Monmouthshire with people who are in employment but have low skills;
- The Journey2Work programme works to develop the employability of people who are economically inactive and/or long term unemployed in Newport, Cardiff and Monmouthshire.

We have also undertaken a review of Neurodevelopmental services in Wales for the Welsh Government and continued to work with Old Bell3 on the evaluation of the Welsh Government's PaCE programme that supports parents to access employment where childcare is an issue. At the end of the year, we started working, again with Old Bell3, on an evaluation of the Communities for Work and Communities for Work Plus programmes for the Welsh Government.

### Financial review

The results for People and Work are as shown in the Statement of Financial Activities.

The trustees have reviewed the charity's need for reserves in line with guidance issued by the Charity Commission. A policy has been established whereby the unrestricted funds not committed or invested in tangible fixed assets (free reserves) should be between two and three months unrestricted expenditure. At this level, the trustees feel they would be able to continue the current activities of the charity in the event of a significant delay in funding. The policy is reviewed annually against current commitments

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

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# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

FOR THE YEAR ENDED 31 DECEMBER 2021

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### **Future proofing our systems**

The charity has worked to bring down its overhead costs as much as possible this year. The research team have, mostly, continued to work from home and the expectation is that they will only meet up in the office once or twice a week in future. We have, consequently, moved our main office into a much smaller room in the same building in Butetown, considerably reducing rent costs. We have dispensed with fixed landline and broadband costs by moving our phone to an online system and using a monthly paid broadband dongle.

### **Next steps**

We have a team of 8 young leaders in Rhondda who have worked with People and Work to develop the Cenhedlaeth Rhondda approach. This is a planned programme of work in Rhondda over the next five years focused on employment and skills; health and wellbeing; and protecting the environment. The plan is to develop work on each of these themes but also to link them to provide an holistic approach so that work on developing digital skills is linked to looking at employment opportunities; help for families to support their children's reading is linked to getting fit and setting up adult reading groups; and social enterprise support is linked to saving the planet.

Going into 2022, funding had been secured for Rhondda Digidol to support digital inclusion and IT skills development over the next three years; a one year pilot Reading Rhondda programme to work with families on literacy and oracy; and a one year pilot PIAT programme to refurbish IT equipment for people who are digitally isolated. A funding strategy has been developed to secure funding to move the PIAS model into one that focuses on environmental issues and supporting social enterprise and to enable Green Light to develop and to build a preventative programme focusing on raising awareness of the labour market amongst children and young people in schools in Rhondda.

### **Structure, governance and management**

The Charity is a company limited by guarantee and does not have any share capital.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Dr C Sophocleous

P G Watkins

G B Davies

J L Huyton

G J McHugh

G D Lewis

(Appointed 1 February 2021)

M McKibben

(Appointed 1 March 2021)

D J Rees

(Appointed 1 February 2021)

Unless otherwise determined by a General Meeting, the numbers of the members of the Governing Body shall not be fewer than six or more than thirty. The Governing Body shall from time to time appoint a member of the Governing Body, either to fill a casual vacancy or by way of addition to the Governing Body, provided that the prescribed maximum is not thereby exceeded. Any member so appointed shall retain their office until the next Annual General Meeting, but he or she shall then be eligible for re-election. None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Dr Duncan Holtom heads up the research team working with Rhodri Bowen, senior researcher, and Heather Pells.

James Hall is operations manager looking after IT systems, office bases and equipment. He also heads up partnership work, and manages the PIAT and Rhondda Digidol programmes and the community development lead, James Watts-Rees. James Watts-Rees manages the Green Light programme with Tomas Jenkins. Natasha Burnell leads on social enterprise and environmental sustainability.

Sarah Lloyd-Jones is the director and works with our Trustees

Ann Churcher is the administrator.

## **PEOPLE AND WORK UNIT**

### **TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2021**

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There are no related parties.

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2021

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The Trustees' report was approved by the Board of Trustees.



**G J McHugh**

Trustee

Dated: 5 July 2022

# PEOPLE AND WORK UNIT

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF PEOPLE AND WORK UNIT

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I report on the financial statements of the Charity for the year ended 31 December 2021, which are set out on pages 9 to 19.

#### **Respective responsibilities of Trustees and examiner**

The Charity's Trustees, who are also the directors of People and Work Unit for the purposes of company law, are responsible for the preparation of the accounts. The 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. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination being a qualified member of the Institute of Chartered Accountants in England and Wales.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission 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 financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, and seeking explanations from you as 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

#### **Independent examiner's statement**

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
  - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
  - (ii) to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities; have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

P E Lea FCA  
Dorrell Oliver Ltd

Chartered Accountant  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

Dated: 5 July 2022

# PEOPLE AND WORK UNIT

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 DECEMBER 2021

		Unrestricted funds 2021 £	Restricted funds 2021 £	Total Unrestricted funds 2021 £	Restricted funds 2020 £	Total 2020 £
	Notes					
<b><u>Income and endowments from:</u></b>						
Donations and legacies	3	-	303,935	303,935	-	287,990
Charitable activities	4	217,944	-	217,944	139,504	139,504
Investments	5	3,292	-	3,292	4,026	4,026
Other income		-	14,230	14,230	-	10,893
<b>Total income</b>		<u>221,236</u>	<u>318,165</u>	<u>539,401</u>	<u>143,530</u>	<u>442,413</u>
<b><u>Expenditure on:</u></b>						
Charitable activities	6	193,267	329,548	522,815	160,867	412,999
Net gains/(losses) on investments	11	(592)	-	(592)	897	897
<b>Net movement in funds</b>		<u>27,377</u>	<u>(11,383)</u>	<u>15,994</u>	<u>(16,440)</u>	<u>30,311</u>
Fund balances at 1 January 2021		<u>78,329</u>	<u>70,498</u>	<u>148,827</u>	<u>94,769</u>	<u>118,516</u>
<b>Fund balances at 31 December 2021</b>		<u><u>105,706</u></u>	<u><u>59,115</u></u>	<u><u>164,821</u></u>	<u><u>78,329</u></u>	<u><u>148,827</u></u>

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# PEOPLE AND WORK UNIT

## BALANCE SHEET

AS AT 31 DECEMBER 2021

	Notes	2021		2020	
		£	£	£	£
<b>Fixed assets</b>					
Investments	12		23,269		21,612
<b>Current assets</b>					
Debtors	13	21,723		33,172	
Cash at bank and in hand		144,340		103,423	
		<u>166,063</u>		<u>136,595</u>	
<b>Creditors: amounts falling due within one year</b>	14	<u>(24,511)</u>		<u>(9,380)</u>	
Net current assets			141,552		127,215
<b>Total assets less current liabilities</b>			<u>164,821</u>		<u>148,827</u>
<b>Income funds</b>					
Restricted funds	15		59,115		70,498
Unrestricted funds			105,706		78,329
			<u>164,821</u>		<u>148,827</u>

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2021.

The Trustees' acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing accounts which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared and delivered in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 5 July 2022



G J McHugh  
Trustee

Company registration number 01809654

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021

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### 1 Accounting policies

#### Charity information

People and Work Unit is a private company limited by guarantee incorporated in England and Wales. The registered office is Unit 1 @Loudon, Plas Iona, Bute Town, Cardiff, CF10 5HW.

#### 1.1 Accounting convention

The accounts have been prepared in accordance with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The Charity is a Public Benefit Entity as defined by FRS 102.

The Charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The accounts are prepared in sterling, which is the functional currency of the Charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

#### 1.4 Incoming resources

Income is recognised when the Charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

#### 1.5 Resources expended

Direct charitable expenditure includes all expenditure directly related to the objects of the charity.

Costs have been apportioned as a percentage of project costs in line with the grant conditions. Salaries have been apportioned on a time basis.

#### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Computers	33.3% Straight line
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# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

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### 1 Accounting policies (Continued)

#### 1.7 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

#### 1.8 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less.

#### 1.9 Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the Charity's balance sheet when the Charity becomes party to the contractual provisions of the instrument.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are measured at transaction price. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors are recognised at transaction price. Financial liabilities classified as payable within one year are not amortised.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

#### 1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

#### 1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

### 2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

### 3 Grant income

	2021	2020
	£	£
Grants receivable	303,935	287,990
	<u>303,935</u>	<u>287,990</u>
<b>Grants receivable for core activities</b>		
The Rank Foundation	59,450	57,900
Children in Need	-	5,000
NLCF Great Ideas	149,632	-
Pen y Cymoedd	-	5,454
Postcode Community	10,500	-
National Lottery	2,600	199,437
WCVA	17,361	-
NLCF People and Places	33,532	-
Moondance Foundation	28,500	-
Confused. com	-	14,745
Other	2,360	5,454
	<u>303,935</u>	<u>287,990</u>

### 4 Charitable activities

	2021	2020
	£	£
Research income	217,944	139,504
	<u>217,944</u>	<u>139,504</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2021

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### 5 Investments

	<b>Unrestricted funds</b>	Unrestricted funds
	<b>2021</b>	2020
	<b>£</b>	£
Interest receivable	3,292	4,026
	<u>          </u>	<u>          </u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

### 6 Charitable activities

	Funded Action Research 2021 £	Research and Evaluation 2021 £	Total 2021 £	Funded Action Research 2020 £	Research and Evaluation 2020 £	Total 2020 £
Staff costs	179,858	121,735	301,593	131,799	106,649	238,448
Depreciation and impairment	-	-	-	1,186	-	1,186
Research	-	25,459	25,459	1,329	11,307	12,636
Project costs	131,488	-	131,488	91,278	-	91,278
Activity and training	1,000	322	1,322	317	-	317
Printing, stationery and advertising	262	1,841	2,103	335	-	335
Phone	1,244	1,283	2,527	1,361	2,370	3,731
IT	4,156	10,056	14,212	5,169	622	5,791
Sundries	16	309	325	10,162	5,670	15,832
Insurance	2,043	1,855	3,898	1,543	1,581	3,124
Rent	5,375	7,317	12,692	4,906	8,440	13,346
Travel expenses	2,742	113	2,855	1,502	3,640	5,142
Interpreters and translators	-	8,063	8,063	1,245	1,633	2,878
Equipment	1,214	4,378	5,592	-	4,823	4,823
Books and subs	150	2,118	2,268	-	6,532	6,532
Administration	-	4,969	4,969	-	-	-
	<u>329,548</u>	<u>189,818</u>	<u>519,366</u>	<u>252,132</u>	<u>153,267</u>	<u>405,399</u>
Share of support costs (see note 8)	-	1,036	1,036	-	3,987	3,987
Share of governance costs (see note 8)	-	2,413	2,413	-	3,613	3,613
	<u>329,548</u>	<u>193,267</u>	<u>522,815</u>	<u>252,132</u>	<u>160,867</u>	<u>412,999</u>
<b>Analysis by fund</b>						
Unrestricted funds	-	193,267	193,267	-	160,867	160,867
Restricted funds	329,548	-	329,548	252,132	-	252,132
	<u>329,548</u>	<u>193,267</u>	<u>522,815</u>	<u>252,132</u>	<u>160,867</u>	<u>412,999</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2021

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### 7 Description of charitable activities

#### Funded Action Research

Funded Action Research - Supporting people in education and skills programmes.

#### Research and Evaluation

Commissioned Research and Evaluation - Evaluating and researching as commissioned.

### 8 Support costs

	<b>Support costs</b>	<b>Governance costs</b>	<b>2021</b>	Support costs	Governance costs	2020
	£	£	£	£	£	£
Bank Charges	1,036	-	1,036	3,987	-	3,987
Accountancy	-	2,413	2,413	-	3,613	3,613
	<u>1,036</u>	<u>2,413</u>	<u>3,449</u>	<u>3,987</u>	<u>3,613</u>	<u>7,600</u>
Analysed between Charitable activities	<u>1,036</u>	<u>2,413</u>	<u>3,449</u>	<u>3,987</u>	<u>3,613</u>	<u>7,600</u>

### 9 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2021

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### 10 Employees

#### Number of employees

The average monthly number of employees during the year was:

	<b>2021</b>	<b>2020</b>
	<b>Number</b>	<b>Number</b>
Project	7	4
Research	4	4
	<u>11</u>	<u>8</u>

#### Employment costs

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Wages and salaries	256,554	200,781
Social security costs	16,124	13,466
Other pension costs	28,915	24,201
	<u>301,593</u>	<u>238,448</u>

There were no employees whose annual remuneration was £60,000 or more.

### 11 Net gains/(losses) on investments

	<b>Unrestricted</b>	<b>Unrestricted</b>
	<b>funds</b>	<b>funds</b>
	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Revaluation of investments	(592)	897
	<u>(592)</u>	<u>897</u>

### 12 Fixed asset investments

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2021

<b>12</b>	<b>Fixed asset investments</b>	<b>(Continued)</b>
		<b>Listed investments</b>
		<b>£</b>
	<b>Cost or valuation</b>	
	At 1 January 2021	21,612
		1,657
	At 31 December 2021	<u>23,269</u>
	<b>Carrying amount</b>	
	At 31 December 2021	<u>23,269</u>
	At 31 December 2020	<u><u>21,612</u></u>
<b>13</b>	<b>Debtors</b>	
		<b>2021</b>
		<b>2020</b>
	<b>Amounts falling due within one year:</b>	<b>£</b>
		<b>£</b>
	Trade debtors	21,723
		<u>33,172</u>
<b>14</b>	<b>Creditors: amounts falling due within one year</b>	
		<b>2021</b>
		<b>2020</b>
		<b>£</b>
		<b>£</b>
	Accruals and deferred income	24,511
		<u>9,380</u>
<b>15</b>	<b>Restricted funds</b>	

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	<b>Movement in funds</b>				<b>Movement in funds</b>			
	Balance at 1 January 2020	Incoming resources	Resources expended	Balance at 1 January 2021	Incoming resources	Resources expended	Balance at 31 December 2021	
	£	£	£	£	£	£	£	
Project funds	23,747	298,883	(252,132)	70,498	318,165	(329,548)	59,115	
	<u>23,747</u>	<u>298,883</u>	<u>(252,132)</u>	<u>70,498</u>	<u>318,165</u>	<u>(329,548)</u>	<u>59,115</u>	

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2021

#### 16 Analysis of net assets between funds

	Unrestricted 2021 £	Restricted 2021 £	Total 2021 £	Unrestricted 2020 £	Restricted 2020 £	Total 2020 £
Fund balances at 31 December 2021 are represented by:						
Investments	23,269	-	23,269	21,612	-	21,612
Current assets/ (liabilities)	38,898	102,654	141,552	56,717	70,498	127,215
	<u>62,167</u>	<u>102,654</u>	<u>164,821</u>	<u>78,329</u>	<u>70,498</u>	<u>148,827</u>

#### 17 Remuneration of key management personnel

The remuneration of key management personnel is as follows.

	2021 £	2020 £
Aggregate compensation	<u>39,570</u>	<u>35,177</u>

**PEOPLE AND WORK UNIT**

England & Wales - Charity number 515211

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# Accounts

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# Annual Report 2021

## People and Work annual report 2021

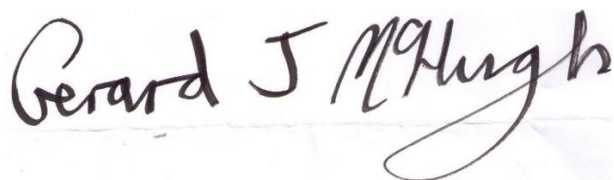
### Foreword

I am writing this in May 2021. The last 12 months have been unprecedented, tragic for some. Throughout this period People and Work has continued to work for the people of The Rhondda and across Wales, though face to face contact has been restricted for long periods, with certain projects particularly affected. Some projects have been able to pivot to help in the Covid situation. Staff have embraced the working from home model, though it is recognised that a hybrid work model is needed for staff to fully operate and develop, going forward. We are now in a far better place in terms of the vaccine and covid infection rates and it is hoped that this improvement will continue.

The economic situation is uncertain, but it must be recognised that there will be a fall out in terms of business failures, unemployment and particularly in available employment opportunities, especially for young people.

Unemployment in The Rhondda has doubled in a year. People and Work recognises that employment is the key focus to improve people's life chances. Education, training and support for people to get into the labour market and secure jobs are the key ingredients of our work.

Financially, People and Work is in a good position at this point, with enough funding sources and research contracts secured. It remains to be seen how the funding landscape might change. People and Work also needs to work on its lobbying role, in developing relationships with, and persuading other organisations of, what is needed and what works, given its long experience.



Gerard McHugh  
Chair, Board of Trustees

## Introduction

People and Work seeks to make a difference through two core functions:

- to promote the value of education and learning (for all age groups) as a tool for tackling inequalities and promoting employment, through a programme of community-based action research projects and social enterprise; and
- to undertake commissioned research and evaluation work for the public and third sectors in Wales addressing inequalities in areas such as education (formal and informal), health and employment.

People and Work's self-generated action research and social enterprise work is funded through charitable trusts and funds. Earned income comes from commissioned research and evaluation work done for the public and voluntary sectors. Any surplus earned through the research and evaluation contracts goes into action research work that aims to build understanding of effective ways to tackle the causes and effects of poverty, especially in relation to education, health and employment outcomes.

- Dr Duncan Holtom heads up the research team working with Rhodri Bowen, senior researcher, and Heather Pells.
- James Hall heads up our project and partnership work working with James Watts-Rees, Tomas Jenkins, Rhian Edwards and Ethan Jones.
- Natasha Burnell leads on social enterprise and environmental sustainability.
- Ann Churcher manages our administration.
- Sarah Lloyd-Jones is the director and works with our Trustees – Ged McHugh (Chairperson), Jan Huyton (Vice-Chairperson), Phil Watkins

(Treasurer), Gareth Lewis, Christala Sophocleous, David Rees, Mary-Ann McKibben and Gordon Davies.

When we wrote our last annual report it was hard to imagine that the COVID-19 lockdowns would continue for another year but, like most charities, we have adapted to the restrictions over the last year and focused on what we could do, rather than what we could not.

We have all become used to working with Zoom and Teams and the whole team has been working from home for most of the last year. We are now making cautious steps towards opening up, planning new work with the community, meetings with partners and opening the Rhondda office. Our survival as a full team through this period has been greatly helped by the support of the Rank Foundation, which acted swiftly to support the sector, and we are very grateful to them. We are also grateful to the flexibility of the National Lottery Community Fund, that allowed us and our partners in the Llechi, Glo a Chefn Gwlad network to reshape our work to meet the restrictions imposed by lockdowns and the new community needs that emerged.

Our work in the last year has focused on employment and community economic development, with a focus on sustainable development; mental health and well-being; supporting the voluntary and community sector in Wales, especially around evaluation; and digital exclusion. Inevitably these themes overlap and much of the work has been able to touch on all of the themes. The thread of 'learning' and developing the skills needed for communities and individuals to thrive has been woven through all the work and as we look forward to the next five years we are building on what we are learning.

## Employment and Community Economic Development

In the last year we have started evaluations of three ESF funded programmes to support people in, or into, work:

- In Ynys Môn the Expanding Môn's Horizon's programme targets people who are in low skilled or insecure work to build on their skills and find better work;
- Skills @Work is an anti-poverty programme working in Cardiff, Newport and Monmouthshire with people who are in employment but have low skills;
- The Journey2Work programme works to develop the employability of people who are economically inactive and/or long term unemployed in Newport, Cardiff and Monmouthshire.

We have built on the research we did in 2019 on the [employment and skill support needs of refugees and asylum seekers in Wales](#) when we were commissioned by the Welsh Government to understand the local/regional labour market skill gaps and opportunities for refugees to increase their employment prospects within Wales. The report is available on the Welsh Government website: <https://gov.wales/restart-refugee-integration-employer-engagement-opportunities>

In late 2020 we launched our own project to support people whose employment had been affected by the pandemic. The Green Light programme is supporting people in Rhondda who have 'fallen through the gaps' of employment support provision. There are no eligibility criteria and the project works with people in employment or not working. It has the flexibility to respond to individual needs and in the first six months has supported 35 people with needs as wide as gaining a CSCS card to be able to work on building sites, supporting someone who had held the same job for twenty years only to be made redundant during the first lockdown to write a CV and develop a job search strategy, and helping

people tackle diverse barriers that get in the way of finding employment, such as accommodation, inability to go online and lack of confidence. One young person had been on an engineering apprenticeship until she was laid off during the first lockdown. Green Light helped her to find temporary work and kept supporting her until she found a new engineering apprenticeship. The project is delivered mainly by Tomas Jenkins, who has a trainee placement with People and Work funded by the Rank Foundation. Tomas is pursuing a qualification in counselling alongside his work. It is also secured a grant from Confused.com to fund support for the participants.

## Sustainable community economic development

People and Work have employed three young community leaders from Rhondda over the last year, two of whom have been funded by the Rank Foundation's Time to Shine programme, as part of the Llechi, Glo a Chefn Gwlad project. This project brings together nine partners from across Wales that each focus on community economic development and the foundational economy, whether it be place-based work to build enterprise and skills, supporting small local businesses and social enterprise, and/or tackling poverty and the exclusion experienced by carers. People and Work facilitate this project as well as our Rhondda work, being one of the partners, and throughout the last year we have met weekly, sharing experience and knowledge. Partners have responded to the pandemic by providing emergency and sustained community support, helping local businesses to survive and tackling the crisis facing young people's employment in various ways, including three partners taking on Kickstart funded trainees in the Spring of 2021. People and Work is offering three Kickstart traineeships in Rhondda based on our work with digital inclusion, sport and fitness, and retail.

We have continued to focus on skills development, particularly on coding skills and developing coding clubs for children and young people. During the lockdowns Ethan Jones developed an online platform via YouTube, to provide skills training in coding.

[https://www.youtube.com/channel/UC8\\_1xSsVRH4CJ9ndun8Cw7Q/featured](https://www.youtube.com/channel/UC8_1xSsVRH4CJ9ndun8Cw7Q/featured)

## Rhondda Web

Our research with Building Communities Trust (BCT) and the Llechi, Glo a Chefn Gwlad partnership on how Welsh communities responded to the first lockdown <sup>1</sup>started to illustrate the impact of digital exclusion for people who were isolated at home, children who needed to access schoolwork online and people looking for jobs. This led to the development of the Rhondda Web project to develop people’s access to the skills, equipment and data they need to function online. We were successful in securing funding from the Moondance Foundation to enable Ethan to stay with People and Work after completing his Time to Shine leadership placement and, with additional funding from the Rank Foundation to buy equipment, he is now delivering Rhondda web, providing people with access to digital equipment and data and training on how to use them.



## PIAS

The PIAS (Play it Again Sport) social enterprise aims to promote opportunities for people in Rhondda to become physically active by selling affordable sports kit and using the income generated to fund activities. PIAS has struggled this year both with sourcing donated sports clothing and kit (the main source was via collection bins in leisure centres and during the last year such centres have been closed or, when open, did not allow the bins) and with selling (the main outlet, Too Good to Waste in Ynyshir, was closed for much of the year). Nevertheless, the enterprise has continued to develop, focusing on its second aim of promoting sustainability and environmental changes. PIAS secured

<sup>1</sup> [A Community response to Covid-19 \(peopleandwork.org.uk\)](https://peopleandwork.org.uk)  
[Ymateb Cymunedau i Covid \(peopleandwork.org.uk\)](https://peopleandwork.org.uk)



additional funding from the climate action programme of the National Lottery Community Fund to buy an electric car and to establish a charging point in Rhondda which has been installed at . The car is being used to promote the use of electric vehicles, as well as providing transport for people to access fitness activities.

Building on this theme, PIAS is supporting a group of local people interested in setting up a zero-waste shop in Rhondda, alongside a well-being centre that creates opportunities for people to get active. The aim is for the group to become independent over the next 18 months, leading a new

Rhondda enterprise.

## Shaping a new economy for Wales

We drew upon our research and partnership work, and also interviews with key stakeholders, to develop a think piece for the WCVA exploring [the role of the voluntary sector in shaping a new economy for Wales](#), given the impact of Brexit and also the pandemic.

## Mental Health and Well-being

Well-being has long been a key area of concern for People and Work. It provides a valuable framework for thinking about people and communities holistically as it includes mental and physical health, economic and social/emotional domains. We have long been clear that targeting only one or

two of the domains is ineffectual and where possible our approach is to support all three. Poor mental and physical health, for example, form significant barriers to accessing good employment and good social and emotional support helps combat low self-confidence and the stresses of starting a new job, therefore all our project work is underpinned by an understanding of the importance of well-being.

The rising incidence of poor mental health being seen in the community during the lockdown periods has prompted project staff to undertake specialist training in supporting conversations with people who are struggling and as identified above, one has started his training to become a counsellor.

The research team has completed an evaluation of the CAMHS In-Reach to Schools pilot project for the Welsh Government. The study involved talking to schools and mental health services in three pilot areas in Wales. The reports can be accessed on the Welsh Government website: [Cymraeg](#) [English](#). The research team also completed a [Review of the evidence for all age mental health services](#) (for the Welsh Government), intended to inform the development of mental health services for young people in Wales.

## Working with the Welsh Voluntary Sector

We continue to provide evaluation support to the Invest Local programme run by BCT. Starting in 2017 we are working over 10 years with BCT to support the 13 communities in the programme to capture the learning from the support and investment (£1million per community) that they are accessing. In 2020, the focus of the evaluation shifted to explore how communities and the programmes responded to the pandemic. This led to a jointly commissioned piece of research, by the Building Communities Trust and the Llechi, Glo a Chefn Gwlad partnership, which [explored community responses to the pandemic](#), across seven Welsh counties (Bridgend, Cardiff, Gwynedd, Neath Port Talbot, Newport, Pembrokeshire and Wrexham). And work with Interlink exploring community responses in RCT.

We have also, this year, completed an evaluation of a five-partner voluntary sector project aimed at tackling isolation and loneliness amongst older people in Powys. The partners were Credu Carers, Citizens Advice Powys, Age Cymru

Powys, RVS and Accessibility Powys. Over three years they worked together to share learning and to build connections that benefit the older people they work with. Their aim was to develop a model of strengths-based, person-centred working and People and Work provided ‘critical friend’ and evaluative support alongside the project.

Other evaluation work being done within the voluntary sector include the Creating Progress project run by Spectacle Theatre in Rhondda Cynon Taf; a ‘training the trainer’ programme being run across Wales by Community Music Wales; the Mamwlad project run by Care and Repair Powys and Age Cymru Powys; and a home support programme being run by Age Cymru West Glamorgan.

People and Work facilitate the Talwrn network of voluntary sector leaders across Wales. The group have continued to meet every other month but meetings have been online. As well as sharing learning from our work, the group explores issues of relevance to the sector and is currently exploring processes around capturing the value of community work.



The Llechi, Glo a Chefn Gwlad partnership<sup>2</sup>, convened by People and Work, grew from the discussions within Talwrn. It aims to develop the capacity of the partners and also to share our learning with the wider sector in Wales. The project is also providing 27 people

with a valuable opportunity to spend a year working in their own community and build community development skills.

## Partnerships

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<sup>2</sup> [Slate, Coal and Countryside - Talwrn](#)  
[Llechi, Glo a Chefn Gwlad - Talwrn](#)

People and Work assumes partnership working in all its activities and much of this report reflects that – whether it be with research colleagues, social enterprises, local authorities or other third sector groups and networks. James Hall leads on this for the Rhondda work (through the Stronger Rhondda informal network) and also links in with some networks beyond the traditional third sector. In Rhondda James Watts-Rees, Natasha Burnell and James Hall are all on the Boards of other organisations as a way of sharing learning, resources and best practice. James Watts-Rees is on the Board of Spectacle Theatre, Natasha Burnell is on the organising committee of St. Anne’s Champions for Ynyshir (and helps organise things with others in the village) and James Hall is on the Boards of Create Your Space (Welcome to our Woods) and Cambrian Village Trust. James Hall also represents People and Work with networks convened by the Bank of England in Wales and Cardiff University Business School, and has been asked to contribute perspectives on the impacts of economic change in disadvantaged communities on a regular basis. He has also linked up one of the Business School professors and her students with Treorchy Chamber of Trade via its chairperson and there are now undergraduates and post-graduates basing some of their research into local economics on the transformation of Treorchy in recent years.

## Future proofing our systems

The COVID crisis has placed a great deal of strain on a rather old IT system, whilst also making our online connectivity more important than ever. With support from the Rank Foundation, People and Work has been able to move from an office based server to a cloud based system that is secure and more robust. James Hall (who is the IT Manager) worked with our IT support specialists (BccIT) to move all our IT infrastructure and storage to the cloud (i.e. hosted off site). As well as the benefit of having IT provision that is updated in real time rather than every five years (with the associated capital costs), migration to the cloud means that People and Work can operate in any office or home with a secure internet connection. We have also migrated our Cardiff landline to a Voice Over Internet Protocol (VOIP) line, keeping our local number and this also does not require us to be in any particular location. This opens up

a range of options for us to consider where our registered office is based in future (and this is likely to remain in Cardiff).

## Next steps

We will be continuing to focus on employment, skills, well-being and sustainable development in the coming year, with a particular focus on place-based work and community economic development. Rhian Edwards, our leader on the Llechi, Glo a Chefn Gwlad project, is spending 2021 capturing how people of the Rhondda have experienced COVID-19 and the lockdowns. She is interviewing people and sharing their stories to build a strong picture of what has happened and what needs to happen now to build a stronger community going forward.

The PIAS project will hopefully launch as an independent initiative this year, with continuing support from People and Work.

We are hoping to build on the Green Light and Rhondda Web projects to develop a stronger skills base and promote local enterprise.

We will also continue to work with partners from across Wales to build greater understanding of what works in promoting community economic regeneration.

People and Work plan to produce a series of short papers to stimulate debate about the issues that we see from our work.

LinkedIn organisation page: <https://www.linkedin.com/company/people-and-work-unit>

Twitter: @PoblGwaith

Facebook: [www.facebook.com/pawu1984](http://www.facebook.com/pawu1984)



Charity Registration No. 511211

Company Registration No. 01809654 (England and Wales)

**PEOPLE AND WORK UNIT**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2020**

# PEOPLE AND WORK UNIT

## LEGAL AND ADMINISTRATIVE INFORMATION

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<b>Trustees</b>	Dr C Sophocleous P G Watkins G B Davies J L Huyton G J McHugh G D Lewis M McKibben D J Rees	(Appointed 1 February 2021) (Appointed 1 March 2021) (Appointed 1 January 2021)
<b>Secretary</b>	S Lloyd-Jones	
<b>Charity number</b>	511211	
<b>Company number</b>	01809854	
<b>Registered office</b>	Unit 1 @Loudon Plas Iona Bute Town Cardiff CF10 5HW	
<b>Independent examiner</b>	Dorrell Oliver Ltd Linden House Monk Street Abergavenny Monmouthshire NP7 5NF	
<b>Bankers</b>	HSBC Bank plc 1 Bridge Street Newport South Wales NP20 6UT	

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# PEOPLE AND WORK UNIT

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# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT )

FOR THE YEAR ENDED 31 DECEMBER 2020

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The Trustees present their report and financial statements for the year ended 31 December 2020.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

### Chair's Report

I am writing this in May 2021. The last 12 months have been unprecedented, tragic for some. Throughout this period People and Work has continued to work for the people of The Rhondda and across Wales, though face to face contact has been restricted for long periods, with certain projects particularly affected. Some projects have been able to pivot to help in the Covid situation. Staff have embraced the working from home model, though it is recognised that a hybrid work model is needed for staff to fully operate and develop, going forward. We are now in a far better place in terms of the vaccine and covid infection rates and it is hoped that this improvement will continue.

The economic situation is uncertain, but it must be recognised that there will be a fall out in terms of business failures, unemployment and particularly in available employment opportunities, especially for young people. Unemployment in The Rhondda has doubled in a year. People and Work recognises that employment is the key focus to improve people's life chances. Education, training and support for people to get into the labour market and secure jobs are the key ingredients of our work.

Financially, People and Work is in a good position at this point, with enough funding sources and research contracts secured. It remains to be seen how the funding landscape might change. People and Work also needs to work on its lobbying role, in developing relationships with, and persuading other organisations of, what is needed and what works, given its long experience.

### Objectives and activities

The charity's objects are the advancement of education by carrying out and/or assisting in carrying out research and study into social and economic problems for the benefit of the general public; additionally, to promote education in all matters related to community organisations.

People and Work seeks to make a difference through two core functions:

- to promote the value of education and learning (for all age groups) as a tool for tackling inequalities and promoting employment, through a programme of community-based action research projects; and
- to undertake commissioned research and evaluation work for the public and third sectors in Wales addressing inequalities in areas such as education (formal and informal), health and employment.

People and Work's self-generated action research work is funded through charitable trusts and funds. Earned income comes from commissioned research and evaluation work done for the public and voluntary sectors. Any surplus earned through the research and evaluation contracts goes into action research work that aims to build understanding of effective ways to tackle the causes and effects of poverty, especially in relation to education, health and employment outcomes.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

FOR THE YEAR ENDED 31 DECEMBER 2020

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### Achievements and performance

When we wrote our last annual report it was hard to imagine that the COVID-19 lockdowns would continue for another year but, like most charities, we have adapted to the restrictions over the last year and focused on what we could do, rather than what we could not.

We have all become used to working with Zoom and Teams and the whole team has been working from home for most of the last year. We are now making cautious steps towards opening up, planning new work with the community, meetings with partners and opening the Rhondda office. Our survival as a full team through this period has been greatly helped by the support of the Rank Foundation, which acted swiftly to support the sector, and we are very grateful to them. We are also grateful to the flexibility of the National Lottery Community Fund, that allowed us and our partners in the Llechi, Gŵa a Chefn Gwlad network to reshape our work to meet the restrictions imposed by lockdowns and the new community needs that emerged.

Our work in the last year has focused on employment and community economic development, with a focus on sustainable development, mental health and well-being; supporting the voluntary and community sector in Wales, especially around evaluation and digital exclusion. Inevitably these themes overlap and much of the work has been able to touch on all of the themes. The thread of 'learning' and developing the skills needed for communities and individuals to thrive has been woven through all the work and as we look forward to the next five years we are building on what we are learning.

### Employment and Community Economic Development

In the last year we have started evaluations of three ESF funded programmes to support people in, or into, work:

- In Ynys Môn the Expanding Môn's Horizon's programme targets people who are in low skilled or insecure work to build on their skills and find better work;
- Skills @Work is an anti-poverty programme working in Cardiff, Newport and Monmouthshire with people who are in employment but have low skills;
- The Journey2Work programme works to develop the employability of people who are economically inactive and/or long term unemployed in Newport, Cardiff and Monmouthshire.

We have built on the research we did in 2019 on the employment and skill support needs of refugees and asylum seekers in Wales when we were commissioned by the Welsh Government to understand the local/regional labour market skill gaps and opportunities for refugees to increase their employment prospects within Wales. The report is available on the Welsh Government website: <https://gov.wales/restart-refugee-integration-employer-engagement-opportunities>

In late 2020 we launched our own project to support people whose employment had been affected by the pandemic. The Green Light programme is supporting people in Rhondda who have 'fallen through the gaps' of employment support provision. There are no eligibility criteria and the project works with people in employment or not working. It has the flexibility to respond to individual needs and in the first six months has supported 35 people with needs as wide as gaining a CSCS card to be able to work on building sites, supporting someone who had held the same job for twenty years only to be made redundant during the first lockdown to write a CV and develop a job search strategy, and helping people tackle diverse barriers that get in the way of finding employment, such as accommodation, inability to go online and lack of confidence. One young person had been on an engineering apprenticeship until she was laid off during the first lockdown. Green Light helped her to find temporary work and kept supporting her until she found a new engineering apprenticeship. The project is delivered mainly by Tomas Jenkins, who has a trainee placement with People and Work funded by the Rank Foundation. Tomas is pursuing a qualification in counselling alongside his work. It has also secured a grant from Confused.com to fund support for the participants.

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

FOR THE YEAR ENDED 31 DECEMBER 2020

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#### *Sustainable community economic development*

People and Work have employed three young community leaders from Rhondda over the last year, two of whom have been funded by the Rank Foundation's Time to Shine programme, as part of the Llechi, Glo a Chefn Gwlad project. This project brings together nine partners from across Wales that each focus on community economic development and the foundational economy, whether it be place-based work to build enterprise and skills, supporting small local businesses and social enterprise, and/or tackling poverty and the exclusion experienced by carers. People and Work facilitate this project as well as our Rhondda work, being one of the partners, and throughout the last year we have met weekly, sharing experience and knowledge. Partners have responded to the pandemic by providing emergency and sustained community support, helping local businesses to survive and tackling the crisis facing young people's employment in various ways, including three partners taking on Kickstart funded trainees in the Spring of 2021. People and Work is offering three Kickstart traineeships in Rhondda based on our work with digital inclusion, sport and fitness, and retail.

We have continued to focus on skills development, particularly on coding skills and developing coding clubs for children and young people. During the lockdowns Ethan Jones developed an online platform via YouTube, to provide skills training in coding.

[https://www.youtube.com/channel/UC8\\_1xSsVRH4CJ9ndun8Gw7Q/featured](https://www.youtube.com/channel/UC8_1xSsVRH4CJ9ndun8Gw7Q/featured)

#### *Rhondda Web*

Our research with Building Communities Trust (BCT) and the Llechi, Glo a Chefn Gwlad partnership on how Welsh communities responded to the first lockdown started to illustrate the impact of digital exclusion for people who were isolated at home, children who needed to access schoolwork online and people looking for jobs. This led to the development of the Rhondda Web project to develop people's access to the skills, equipment and data they need to function online. We were successful in securing funding from the Moondance Foundation to enable Ethan to stay with People and Work after completing his Time to Shine leadership placement and, with additional funding from the Rank Foundation to buy equipment, he is now delivering Rhondda web, providing people with access to digital equipment and data and training on how to use them.

#### *PIAS*

The PIAS (Play it Again Sport) social enterprise aims to promote opportunities for people in Rhondda to become physically active by selling affordable sports kit and using the income generated to fund activities. PIAS has struggled this year both with sourcing donated sports clothing and kit (the main source was via collection bins in leisure centres and during the last year such centres have been closed or, when open, did not allow the bins) and with selling (the main outlet, Too Good to Waste in Ynyshtir, was closed for much of the year). Nevertheless, the enterprise has continued to develop, focusing on its second aim of promoting sustainability and environmental changes. PIAS secured additional funding from the climate action programme of the National Lottery Community Fund to buy an electric car and to establish a charging point in Rhondda. The car is being used to promote the use of electric vehicles, as well as providing transport for people to access fitness activities.

Building on this theme, PIAS is supporting a group of local people interested in setting up a zero-waste shop in Rhondda, alongside a well-being centre that creates opportunities for people to get active. The aim is for the group to become independent over the next 18 months, leading a new Rhondda enterprise.

#### *Shaping a new economy for Wales*

We drew upon our research and partnership work, and also interviews with key stakeholders, to develop a think piece for the WCVA exploring the role of the voluntary sector in shaping a new economy for Wales, given the impact of Brexit and also the pandemic.

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2020

---

#### Mental Health and Well-being

Well-being has long been a key area of concern for People and Work. It provides a valuable framework for thinking about people and communities holistically as it includes mental and physical health, economic and social/emotional domains. We have long been clear that targeting only one or two of the domains is ineffectual and where possible our approach is to support all three. Poor mental and physical health, for example, form significant barriers to accessing good employment and good social and emotional support helps combat low self-confidence and the stresses of starting a new job, therefore all our project work is underpinned by an understanding of the importance of well-being.

The rising incidence of poor mental health being seen in the community during the lockdown periods has prompted project staff to undertake specialist training in supporting conversations with people who are struggling and as identified above, one has started his training to become a counsellor.

The research team has completed an evaluation of the CAMHS In-Reach to Schools pilot project for the Welsh Government. The study involved talking to schools and mental health services in three pilot areas in Wales. The reports can be accessed on the Welsh Government website : Cymraeg English. The research team also completed a review of the evidence for all age mental health services (for the Welsh Government), intended to inform the development of mental health services for young people in Wales.

#### Working with the Welsh Voluntary Sector

We continue to provide evaluation support to the Invest Local programme run by BCT. Starting in 2017 we are working over 10 years with BCT to support the 13 communities in the programme to capture the learning from the support and investment (£1million per community) that they are accessing. In 2020, the focus of the evaluation shifted to explore how communities and the programmes responded to the pandemic. This led to a jointly commissioned piece of research, by the Building Communities Trust and the Llechi, Gŵ a Chefn Gwlad partnership, which explored community responses to the pandemic across seven Welsh counties (Bridgend, Cardiff, Gwynedd, Neath Port Talbot, Newport, Pembrokeshire and Wrexham. And work with Interlink exploring community responses in RCT.

We have also, this year, completed an evaluation of a five-partner voluntary sector project aimed at tackling isolation and loneliness amongst older people in Powys. The partners were Credu Carers, Citizens Advice Powys, Age Cymru Powys, RVS and Accessibility Powys. Over three years they worked together to share learning and to build connections that benefit the older people they work with. Their aim was to develop a model of strengths-based, person-centred working and People and Work provided 'critical friend' and evaluative support alongside the project.

Other evaluation work being done within the voluntary sector include the Creating Progress project run by Spectacle Theatre in Rhondda Cynon Taf; a 'training the trainer' programme being run across Wales by Community Music Wales; the Mawlad project run by Care and Repair Powys and Age Cymru Powys; and a home support programme being run by Age Cymru West Glamorgan.

People and Work facilitate the Talwrn network of voluntary sector leaders across Wales. The group have continued to meet every other month but meetings have been online. As well as sharing learning from our work, the group explores issues of relevance to the sector and is currently exploring processes around capturing the value of community work.

The Llechi, Gŵ a Chefn Gwlad partnership, convened by People and Work, grew from the discussions within Talwrn. It aims to develop the capacity of the partners and also to share our learning with the wider sector in Wales. The project is also providing 27 people with a valuable opportunity to spend a year working in their own community and build community development skills.

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT(INCLUDING DIRECTORS' REPORT (CONTINUED))

#### FOR THE YEAR ENDED 31 DECEMBER 2020

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#### Financial review

The results for People and Work are as shown in the Statement of Financial Activities.

The trustees have reviewed the charity's need for reserves in line with guidance issued by the Charity Commission. A policy has been established whereby the unrestricted funds not committed or invested in tangible fixed assets (free reserves) should be between two and three months unrestricted expenditure. At this level, the trustees feel they would be able to continue the current activities of the charity in the event of a significant delay in funding.

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

#### Future proofing our systems

The COVID crisis has placed a great deal of strain on a rather old IT system, whilst also making our online connectivity more important than ever. With support from the Rank Foundation, People and Work has been able to move from an office based server to a cloud based system that is secure and more robust. James Hall (who is the IT Manager) worked with our IT support specialists (BocIT) to move all our IT infrastructure and storage to the cloud (i.e. hosted off site). As well as the benefit of having IT provision that is updated in real time rather than every five years (with the associated capital costs), migration to the cloud means that People and Work can operate in any office or home with a secure internet connection. We have also migrated our Cardiff landline to a Voice Over Internet Protocol (VOIP) line, keeping our local number and this also does not require us to be in any particular location. This opens up a range of options for us to consider where our registered office is based in future (and this is likely to remain in Cardiff).

#### Next steps

We will be continuing to focus on employment, skills, well-being and sustainable development in the coming year, with a particular focus on place-based work and community economic development. Rhian Edwards, our leader on the Llechl, Glo a Chofn Gwlad project, is spending 2021 capturing how people of the Rhondda have experienced COVID-19 and the lockdowns. She is interviewing people and sharing their stories to build a strong picture of what has happened and what needs to happen now to build a stronger community going forward.

The PIAS project will hopefully launch as an independent initiative this year, with continuing support from People and Work.

We are hoping to build on the Green Light and Rhondda Web projects to develop a stronger skills base and promote local enterprise.

We will also continue to work with partners from across Wales to build greater understanding of what works in promoting community economic regeneration.

#### Structure, governance and management

The Charity is a company limited by guarantee and does not have any share capital.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Dr C Sophocleous

A C McCaffer

(Resigned 16 August 2020)

P G Watkins

G B Davies

J L Huyton

G J McHugh

R Robinson

(Resigned 3 February 2020)

G D Lewis

(Appointed 1 February 2021)

M McKibben

(Appointed 1 March 2021)

D J Rees

(Appointed 1 January 2021)

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2020

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G J Lewis

(Resigned 7 December 2020)

Unless otherwise determined by a General Meeting, the numbers of the members of the Governing Body shall not be fewer than six or more than thirty. The Governing Body shall from time to time appoint a member of the Governing Body, either to fill a casual vacancy or by way of addition to the Governing Body, provided that the prescribed maximum is not thereby exceeded. Any member so appointed shall retain their office until the next Annual General Meeting, but he or she shall then be eligible for re-election. None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Dr Duncan Holtom heads up the research team working with Rhodri Bowen, senior researcher, and Heather Pells.

James Hall heads up our project and partnership work working with James Watts-Rees, Tomas Jenkins, Rhian Edwards and Ethan Jones.

Natasha Burnell leads on social enterprise and environmental sustainability.

Sarah Lloyd-Jones is the director and works with our Trustees – Ged McHugh (Chairperson), Jan Huyton (Vice-Chairperson), Phil Watkins (Treasurer), Gareth Lewis, Christala Sophocleous, David Rees, Mary-Ann McKibben and Gordon Davies.

Ann Churcher is the administrator.

#### Partnerships

People and Work assumes partnership working in all its activities and much of this report reflects that – whether it be with research colleagues, social enterprises, local authorities or other third sector groups and networks. James Hall leads on this for the Rhondda work (through the Stronger Rhondda informal network) and also links in with some networks beyond the traditional third sector. In Rhondda James Watts-Rees, Natasha Burnell and James Hall are all on the Boards of other organisations as a way of sharing learning, resources and best practice. James Watts-Rees is on the Board of Spectacle Theatre, Natasha Burnell is on the organising committee of St. Anne's Champions for Ynyshir (and helps organise things with others in the village) and James Hall is on the Boards of Create Your Space (Welcome to our Woods) and Cambrian Village Trust. James Hall also represents People and Work with networks convened by the Bank of England in Wales and Cardiff University Business School, and has been asked to contribute perspectives on the impacts of economic change in disadvantaged communities on a regular basis. He has also linked up one of the Business School professors and her students with Treorchy Chamber of Trade via its chairperson and there are now undergraduates and post-graduates basing some of their research into local economics on the transformation of Treorchy in recent years.

There are no related parties.

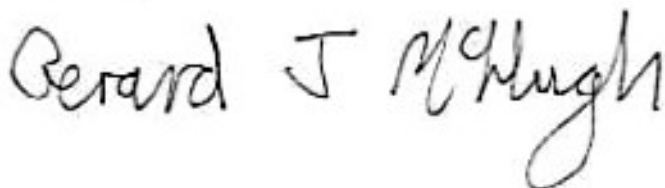
## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2020

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The Trustees' report was approved by the Board of Trustees.

G J McHugh  
Trustee  
Dated: 11 June 2021

A handwritten signature in black ink that reads "Gerard J McHugh". The signature is written in a cursive style with a large, looped 'G' and 'H'.

# PEOPLE AND WORK UNIT

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF PEOPLE AND WORK UNIT

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I report on the financial statements of the Charity for the year ended 31 December 2020, which are set out on pages 9 to 19.

#### Respective responsibilities of Trustees and examiner

The Charity's Trustees, who are also the directors of People and Work Unit for the purposes of company law, are responsible for the preparation of the accounts. The 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. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination being a qualified member of the Institute of Chartered Accountants in England and Wales.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission 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 financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, and seeking explanations from you as 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

#### Independent examiner's statement

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
  - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
  - (ii) to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities;have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

P E Lea FCA  
Dorrell Oliver Ltd

Chartered Accountant  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

Dated: 11 June 2021

## PEOPLE AND WORK UNIT

### STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 DECEMBER 2020

	Notes	Unrestricted funds 2020 £	Restricted funds 2020 £	Total 2020 £	Unrestricted funds 2019 £	Restricted funds 2019 £	Total 2019 £
<b><u>Income and endowments from:</u></b>							
Donations and legacies	3	-	287,990	287,990	-	97,406	97,406
Charitable activities	4	139,504	-	139,504	196,552	-	196,552
Investments	5	4,026	-	4,026	954	-	954
Other income		-	10,893	10,893	-	13,105	13,105
<b>Total income</b>		<b>143,530</b>	<b>298,883</b>	<b>442,413</b>	<b>197,506</b>	<b>110,511</b>	<b>308,017</b>
<b><u>Expenditure on:</u></b>							
Charitable activities	6	160,867	252,132	412,999	208,974	96,649	305,623
Net gains/(losses) on investments	11	897	-	897	1,273	-	1,273
<b>Net movement in funds</b>		<b>(16,440)</b>	<b>46,751</b>	<b>30,311</b>	<b>(10,195)</b>	<b>13,862</b>	<b>3,667</b>
Fund balances at 1 January 2020		94,769	23,747	118,516	104,964	9,885	114,849
<b>Fund balances at 31 December 2020</b>		<b>78,329</b>	<b>70,498</b>	<b>148,827</b>	<b>94,769</b>	<b>23,747</b>	<b>118,516</b>

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# PEOPLE AND WORK UNIT

## BALANCE SHEET

AS AT 31 DECEMBER 2020

	Notes	2020		2019	
		£	£	£	£
<b>Fixed assets</b>					
Tangible assets	12		-		1,186
Investments	13		21,612		20,715
			<u>21,612</u>		<u>21,901</u>
<b>Current assets</b>					
Debtors	14	33,172		59,245	
Cash at bank and in hand		103,423		47,111	
		<u>136,595</u>		<u>106,356</u>	
<b>Creditors: amounts falling due within one year</b>	15	(9,380)		(9,741)	
Net current assets			127,215		96,615
<b>Total assets less current liabilities</b>			<u>148,827</u>		<u>118,516</u>
<b>Income funds</b>					
Restricted funds	16		70,498		23,747
Unrestricted funds			78,329		94,769
			<u>148,827</u>		<u>118,516</u>

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2020.

The Trustees acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing accounts which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 11 June 2021

G J McHugh  
Trustee

Company Registration No. 01809654

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2020

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### 1 Accounting policies

#### Charity information

People and Work Unit is a private company limited by guarantee incorporated in England and Wales. The registered office is Unit 1 @Loudon, Plas Iona, Bute Town, Cardiff, CF10 5HW.

#### 1.1 Accounting convention

The accounts have been prepared in accordance with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The Charity is a Public Benefit Entity as defined by FRS 102.

The Charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The accounts are prepared in sterling, which is the functional currency of the Charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

#### 1.4 Incoming resources

Income is recognised when the Charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

#### 1.5 Resources expended

Direct charitable expenditure includes all expenditure directly related to the objects of the charity.

Costs have been apportioned as a percentage of project costs in line with the grant conditions. Salaries have been apportioned on a time basis.

#### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Computers	33.3% Straight line
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# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

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### 1 Accounting policies

(Continued)

#### 1.7 Fixed asset Investments

Fixed asset Investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

#### 1.8 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less.

#### 1.9 Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the Charity's balance sheet when the Charity becomes party to the contractual provisions of the instrument.

##### *Basic financial assets*

Basic financial assets, which include debtors and cash and bank balances, are measured at transaction price. Financial assets classified as receivable within one year are not amortised.

##### *Basic financial liabilities*

Basic financial liabilities, including creditors are recognised at transaction price. Financial liabilities classified as payable within one year are not amortised.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less.

##### *Derecognition of financial liabilities*

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

#### 1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

#### 1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

#### 1.12 Leases

Rentals payable under operating leases, including any lease incentives received, are charged as an expense on a straight line basis over the term of the relevant lease.

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

#### 2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

#### 3 Grant income

	2020	2019
	£	£
Grants receivable	<u>287,990</u>	<u>97,406</u>
<b>Grants receivable for core activities</b>		
The Rank Foundation	57,900	17,900
Children in Need	5,000	7,500
Pen y Cymoedd	5,454	10,910
National Lottery	199,437	2,500
Waterloo Foundation	-	2,000
G Weston	-	45,000
Moondance Foundation	-	3,450
Confused.com	14,744	-
Other	5,455	8,146
	<u>287,990</u>	<u>97,406</u>

#### 4 Charitable activities

	2020	2019
	£	£
Research income	<u>139,504</u>	<u>106,552</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

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### 5 Investments

	Unrestricted funds	Unrestricted funds
	2020	2019
	£	£
Interest receivable	4,026	954

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

#### 6 Charitable activities

	Funded Action Research 2020 £	Research and Evaluation 2020 £	Total 2020 £	Total 2019 £
Staff costs	131,799	106,649	238,448	190,093
Depreciation and impairment	1,186	-	1,186	3,539
Research	1,329	11,307	12,636	29,797
Project costs	91,278	-	91,278	12,613
Activity and training	317	-	317	1,554
Printing, stationery and advertising	335	-	335	-
Phone	1,361	1,221	2,582	4,548
Conference and courses	5,169	622	5,791	9,980
Sundries	10,162	5,671	15,833	5,490
Insurance	1,543	-	1,543	800
Rent	4,906	-	4,906	5,294
Travel expenses	1,502	3,640	5,142	8,191
Books and subscriptions	1,245	1,633	2,878	1,877
IT	-	4,823	4,823	4,506
Interpreters and translators	-	6,532	6,532	11,001
	<u>252,132</u>	<u>142,098</u>	<u>394,230</u>	<u>289,283</u>
Share of support costs (see note 8)	-	15,156	15,156	14,000
Share of governance costs (see note 8)	-	3,613	3,613	2,340
	<u>252,132</u>	<u>160,867</u>	<u>412,999</u>	<u>305,623</u>
<b>Analysis by fund</b>				
Unrestricted funds	-	160,867	160,867	208,974
Restricted funds	252,132	-	252,132	96,649
	<u>252,132</u>	<u>160,867</u>	<u>412,999</u>	<u>305,623</u>
<b>For the year ended 31 December 2019</b>				
Unrestricted funds	-	208,974		208,974
Restricted funds	96,649	-		96,649
	<u>96,649</u>	<u>208,974</u>		<u>305,623</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

### 7 Description of charitable activities

#### Funded Action Research

Funded Action Research - Supporting people in education and skills programmes.

#### Research and Evaluation

Commissioned Research and Evaluation - Evaluating and researching as commissioned.

### 8 Support costs

	Support costs	Governance costs	2020	2019
	£	£	£	£
Phone	1,148	-	1,148	1,773
Insurance	1,581	-	1,581	1,339
Rent	8,440	-	8,440	10,391
Bank Charges	3,987	-	3,987	497
Accountancy	-	3,613	3,613	2,340
	<u>15,156</u>	<u>3,613</u>	<u>18,769</u>	<u>16,340</u>
Analysed between Charitable activities	<u>15,156</u>	<u>3,613</u>	<u>18,769</u>	<u>16,340</u>

### 9 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

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#### 10 Employees

##### Number of employees

The average monthly number of employees during the year was:

	2020 Number	2019 Number
Project	4	3
Research	4	4
	<u>8</u>	<u>7</u>

##### Employment costs

	2020 £	2019 £
Wages and salaries	200,781	163,313
Social security costs	13,466	11,160
Other pension costs	24,201	15,620
	<u>238,448</u>	<u>190,093</u>

There were no employees whose annual remuneration was £60,000 or more.

#### 11 Net gains/(losses) on investments

	Unrestricted funds 2020 £	Unrestricted funds 2019 £
Revaluation of investments	<u>897</u>	<u>1,273</u>

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

#### 12 Tangible fixed assets

	Computers £
<b>Cost</b>	
At 1 January 2020	17,747
At 31 December 2020	<u>17,747</u>
<b>Depreciation and impairment</b>	
At 1 January 2020	16,561
Depreciation charged in the year	1,186
At 31 December 2020	<u>17,747</u>
<b>Carrying amount</b>	
At 31 December 2020	-
At 31 December 2019	<u>1,186</u>

#### 13 Fixed asset investments

	Listed investments £
<b>Cost or valuation</b>	
At 1 January 2020	20,715
	897
At 31 December 2020	<u>21,612</u>
<b>Carrying amount</b>	
At 31 December 2020	21,612
At 31 December 2019	<u>20,715</u>

#### 14 Debtors

	2020 £	2019 £
<b>Amounts falling due within one year:</b>		
Trade debtors	<u>33,172</u>	<u>59,245</u>

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

#### FOR THE YEAR ENDED 31 DECEMBER 2020

#### 15 Creditors: amounts falling due within one year

	2020 £	2019 £
Accruals and deferred income	9,380	9,741

#### 16 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds			Movement in funds			Balance at 31 December 2020 £
	Balance at 1 January 2019 £	Incoming resources £	Resources expended £	Balance at 1 January 2020 £	Incoming resources £	Resources expended £	
Project funds	9,885	110,511	(96,649)	23,747	298,883	(252,132)	70,498

#### 17 Analysis of net assets between funds

	Unrestricted 2020 £	Restricted 2020 £	Total 2020 £	Unrestricted 2019 £	Restricted 2019 £	Total 2019 £
Fund balances at 31 December 2020 are represented by:						
Tangible assets	-	-	-	883	303	1,186
Investments	21,612	-	21,612	20,716	-	20,716
Current assets/ (liabilities)	56,717	70,498	127,215	73,171	23,444	96,615
	<u>78,329</u>	<u>70,498</u>	<u>148,827</u>	<u>94,769</u>	<u>23,747</u>	<u>118,516</u>

#### 18 Remuneration of key management personnel

The remuneration of key management personnel is as follows.

	2020 £	2019 £
Aggregate compensation	35,177	28,841

Charity Registration No. 511211

Company Registration No. 01809654 (England and Wales)

**PEOPLE AND WORK UNIT**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2020**

# PEOPLE AND WORK UNIT

## LEGAL AND ADMINISTRATIVE INFORMATION

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<b>Trustees</b>	Dr C Sophocleous P G Watkins G B Davies J L Huyton G J McHugh G D Lewis M McKibben D J Rees	(Appointed 1 February 2021) (Appointed 1 March 2021) (Appointed 1 January 2021)
<b>Secretary</b>	S Lloyd-Jones	
<b>Charity number</b>	511211	
<b>Company number</b>	01809654	
<b>Registered office</b>	Unit 1 @Loudon Plas Iona Bute Town Cardiff CF10 5HW	
<b>Independent examiner</b>	Dorrell Oliver Ltd Linden House Monk Street Abergavenny Monmouthshire NP7 5NF	
<b>Bankers</b>	HSBC Bank plc 1 Bridge Street Newport South Wales NP20 6UT	

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# PEOPLE AND WORK UNIT

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# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT )

### FOR THE YEAR ENDED 31 DECEMBER 2020

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The Trustees present their report and financial statements for the year ended 31 December 2020.

The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016)

#### Chair's Report

I am writing this in May 2021. The last 12 months have been unprecedented, tragic for some. Throughout this period People and Work has continued to work for the people of The Rhondda and across Wales, though face to face contact has been restricted for long periods, with certain projects particularly affected. Some projects have been able to pivot to help in the Covid situation. Staff have embraced the working from home model, though it is recognised that a hybrid work model is needed for staff to fully operate and develop, going forward. We are now in a far better place in terms of the vaccine and covid infection rates and it is hoped that this improvement will continue.

The economic situation is uncertain, but it must be recognised that there will be a fall out in terms of business failures, unemployment and particularly in available employment opportunities, especially for young people. Unemployment in The Rhondda has doubled in a year. People and Work recognises that employment is the key focus to improve people's life chances. Education, training and support for people to get into the labour market and secure jobs are the key ingredients of our work.

Financially, People and Work is in a good position at this point, with enough funding sources and research contracts secured. It remains to be seen how the funding landscape might change. People and Work also needs to work on its lobbying role, in developing relationships with, and persuading other organisations of, what is needed and what works, given its long experience.

#### Objectives and activities

The charity's objects are the advancement of education by carrying out and/or assisting in carrying out research and study into social and economic problems for the benefit of the general public; additionally, to promote education in all matters related to community organisations.

People and Work seeks to make a difference through two core functions:

- to promote the value of education and learning (for all age groups) as a tool for tackling inequalities and promoting employment, through a programme of community-based action research projects; and
- to undertake commissioned research and evaluation work for the public and third sectors in Wales addressing inequalities in areas such as education (formal and informal), health and employment.

People and Work's self-generated action research work is funded through charitable trusts and funds. Earned income comes from commissioned research and evaluation work done for the public and voluntary sectors. Any surplus earned through the research and evaluation contracts goes into action research work that aims to build understanding of effective ways to tackle the causes and effects of poverty, especially in relation to education, health and employment outcomes.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

**FOR THE YEAR ENDED 31 DECEMBER 2020**

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### **Achievements and performance**

When we wrote our last annual report it was hard to imagine that the COVID-19 lockdowns would continue for another year but, like most charities, we have adapted to the restrictions over the last year and focused on what we could do, rather than what we could not.

We have all become used to working with Zoom and Teams and the whole team has been working from home for most of the last year. We are now making cautious steps towards opening up, planning new work with the community, meetings with partners and opening the Rhondda office. Our survival as a full team through this period has been greatly helped by the support of the Rank Foundation, which acted swiftly to support the sector, and we are very grateful to them. We are also grateful to the flexibility of the National Lottery Community Fund, that allowed us and our partners in the Llechi, Glo a Chefn Gwlad network to reshape our work to meet the restrictions imposed by lockdowns and the new community needs that emerged.

Our work in the last year has focused on employment and community economic development, with a focus on sustainable development; mental health and well-being; supporting the voluntary and community sector in Wales, especially around evaluation and digital exclusion. Inevitably these themes overlap and much of the work has been able to touch on all of the themes. The thread of 'learning' and developing the skills needed for communities and individuals to thrive has been woven through all the work and as we look forward to the next five years we are building on what we are learning.

### **Employment and Community Economic Development**

In the last year we have started evaluations of three ESF funded programmes to support people in, or into, work:

- In Ynys Môn the Expanding Môn's Horizon's programme targets people who are in low skilled or insecure work to build on their skills and find better work;
- Skills @Work is an anti-poverty programme working in Cardiff, Newport and Monmouthshire with people who are in employment but have low skills;
- The Journey2Work programme works to develop the employability of people who are economically inactive and/or long term unemployed in Newport, Cardiff and Monmouthshire.

We have built on the research we did in 2019 on the employment and skill support needs of refugees and asylum seekers in Wales when we were commissioned by the Welsh Government to understand the local/regional labour market skill gaps and opportunities for refugees to increase their employment prospects within Wales. The report is available on the Welsh Government website: <https://gov.wales/restart-refugee-integration-employer-engagement-opportunities>

In late 2020 we launched our own project to support people whose employment had been affected by the pandemic. The Green Light programme is supporting people in Rhondda who have 'fallen through the gaps' of employment support provision. There are no eligibility criteria and the project works with people in employment or not working. It has the flexibility to respond to individual needs and in the first six months has supported 35 people with needs as wide as gaining a CSCS card to be able to work on building sites, supporting someone who had held the same job for twenty years only to be made redundant during the first lockdown to write a CV and develop a job search strategy, and helping people tackle diverse barriers that get in the way of finding employment, such as accommodation, inability to go online and lack of confidence. One young person had been on an engineering apprenticeship until she was laid off during the first lockdown. Green Light helped her to find temporary work and kept supporting her until she found a new engineering apprenticeship. The project is delivered mainly by Tomas Jenkins, who has a trainee placement with People and Work funded by the Rank Foundation. Tomas is pursuing a qualification in counselling alongside his work. It has also secured a grant from Confused.com to fund support for the participants.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

### FOR THE YEAR ENDED 31 DECEMBER 2020

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#### ***Sustainable community economic development***

People and Work have employed three young community leaders from Rhondda over the last year, two of whom have been funded by the Rank Foundation's Time to Shine programme, as part of the Llechi, Glo a Chefn Gwlad project. This project brings together nine partners from across Wales that each focus on community economic development and the foundational economy, whether it be place-based work to build enterprise and skills, supporting small local businesses and social enterprise, and/or tackling poverty and the exclusion experienced by carers. People and Work facilitate this project as well as our Rhondda work, being one of the partners, and throughout the last year we have met weekly, sharing experience and knowledge. Partners have responded to the pandemic by providing emergency and sustained community support, helping local businesses to survive and tackling the crisis facing young people's employment in various ways, including three partners taking on Kickstart funded trainees in the Spring of 2021. People and Work is offering three Kickstart traineeships in Rhondda based on our work with digital inclusion, sport and fitness, and retail.

We have continued to focus on skills development, particularly on coding skills and developing coding clubs for children and young people. During the lockdowns Ethan Jones developed an online platform via YouTube, to provide skills training in coding.

[https://www.youtube.com/channel/UC8\\_1xSsVRH4CJ9ndun8Cw7Q/featured](https://www.youtube.com/channel/UC8_1xSsVRH4CJ9ndun8Cw7Q/featured)

#### ***Rhondda Web***

Our research with Building Communities Trust (BCT) and the Llechi, Glo a Chefn Gwlad partnership on how Welsh communities responded to the first lockdown started to illustrate the impact of digital exclusion for people who were isolated at home, children who needed to access schoolwork online and people looking for jobs. This led to the development of the Rhondda Web project to develop people's access to the skills, equipment and data they need to function online. We were successful in securing funding from the Moondance Foundation to enable Ethan to stay with People and Work after completing his Time to Shine leadership placement and, with additional funding from the Rank Foundation to buy equipment, he is now delivering Rhondda web, providing people with access to digital equipment and data and training on how to use them.

#### ***PIAS***

The PIAS (Play it Again Sport) social enterprise aims to promote opportunities for people in Rhondda to become physically active by selling affordable sports kit and using the income generated to fund activities. PIAS has struggled this year both with sourcing donated sports clothing and kit (the main source was via collection bins in leisure centres and during the last year such centres have been closed or, when open, did not allow the bins) and with selling (the main outlet, Too Good to Waste in Ynyshir, was closed for much of the year). Nevertheless, the enterprise has continued to develop, focusing on its second aim of promoting sustainability and environmental changes. PIAS secured additional funding from the climate action programme of the National Lottery Community Fund to buy an electric car and to establish a charging point in Rhondda. The car is being used to promote the use of electric vehicles, as well as providing transport for people to access fitness activities.

Building on this theme, PIAS is supporting a group of local people interested in setting up a zero-waste shop in Rhondda, alongside a well-being centre that creates opportunities for people to get active. The aim is for the group to become independent over the next 18 months, leading a new Rhondda enterprise.

#### ***Shaping a new economy for Wales***

We drew upon our research and partnership work, and also interviews with key stakeholders, to develop a think piece for the WCVA exploring the role of the voluntary sector in shaping a new economy for Wales, given the impact of Brexit and also the pandemic.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

**FOR THE YEAR ENDED 31 DECEMBER 2020**

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### **Mental Health and Well-being**

Well-being has long been a key area of concern for People and Work. It provides a valuable framework for thinking about people and communities holistically as it includes mental and physical health, economic and social/emotional domains. We have long been clear that targeting only one or two of the domains is ineffectual and where possible our approach is to support all three. Poor mental and physical health, for example, form significant barriers to accessing good employment and good social and emotional support helps combat low self-confidence and the stresses of starting a new job, therefore all our project work is underpinned by an understanding of the importance of well-being.

The rising incidence of poor mental health being seen in the community during the lockdown periods has prompted project staff to undertake specialist training in supporting conversations with people who are struggling and as identified above, one has started his training to become a counsellor.

The research team has completed an evaluation of the CAMHS In-Reach to Schools pilot project for the Welsh Government. The study involved talking to schools and mental health services in three pilot areas in Wales. The reports can be accessed on the Welsh Government website : Cymraeg English. The research team also completed a review of the evidence for all age mental health services (for the Welsh Government), intended to inform the development of mental health services for young people in Wales.

### **Working with the Welsh Voluntary Sector**

We continue to provide evaluation support to the Invest Local programme run by BCT. Starting in 2017 we are working over 10 years with BCT to support the 13 communities in the programme to capture the learning from the support and investment (£1million per community) that they are accessing. In 2020, the focus of the evaluation shifted to explore how communities and the programmes responded to the pandemic. This led to a jointly commissioned piece of research, by the Building Communities Trust and the Llechi, Glo a Chefn Gwlad partnership, which explored community responses to the pandemic across seven Welsh counties (Bridgend, Cardiff, Gwynedd, Neath Port Talbot, Newport, Pembrokeshire and Wrexham. And work with Interlink exploring community responses in RCT.

We have also, this year, completed an evaluation of a five-partner voluntary sector project aimed at tackling isolation and loneliness amongst older people in Powys. The partners were Credu Carers, Citizens Advice Powys, Age Cymru Powys, RVS and Accessibility Powys. Over three years they worked together to share learning and to build connections that benefit the older people they work with. Their aim was to develop a model of strengths-based, person-centred working and People and Work provided 'critical friend' and evaluative support alongside the project.

Other evaluation work being done within the voluntary sector include the Creating Progress project run by Spectacle Theatre in Rhondda Cynon Taf; a 'training the trainer' programme being run across Wales by Community Music Wales; the Mamwlad project run by Care and Repair Powys and Age Cymru Powys; and a home support programme being run by Age Cymru West Glamorgan.

People and Work facilitate the Talwrn network of voluntary sector leaders across Wales. The group have continued to meet every other month but meetings have been online. As well as sharing learning from our work, the group explores issues of relevance to the sector and is currently exploring processes around capturing the value of community work.

The Llechi, Glo a Chefn Gwlad partnership, convened by People and Work, grew from the discussions within Talwrn. It aims to develop the capacity of the partners and also to share our learning with the wider sector in Wales. The project is also providing 27 people with a valuable opportunity to spend a year working in their own community and build community development skills.

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED))

FOR THE YEAR ENDED 31 DECEMBER 2020

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### Financial review

The results for People and Work are as shown in the Statement of Financial Activities.

The trustees have reviewed the charity's need for reserves in line with guidance issued by the Charity Commission. A policy has been established whereby the unrestricted funds not committed or invested in tangible fixed assets (free reserves) should be between two and three months unrestricted expenditure. At this level, the trustees feel they would be able to continue the current activities of the charity in the event of a significant delay in funding.

The Trustees have assessed the major risks to which the Charity is exposed, and are satisfied that systems are in place to mitigate exposure to the major risks.

### Future proofing our systems

The COVID crisis has placed a great deal of strain on a rather old IT system, whilst also making our online connectivity more important than ever. With support from the Rank Foundation, People and Work has been able to move from an office based server to a cloud based system that is secure and more robust. James Hall (who is the IT Manager) worked with our IT support specialists (BcclT) to move all our IT infrastructure and storage to the cloud (i.e. hosted off site). As well as the benefit of having IT provision that is updated in real time rather than every five years (with the associated capital costs), migration to the cloud means that People and Work can operate in any office or home with a secure internet connection. We have also migrated our Cardiff landline to a Voice Over Internet Protocol (VOIP) line, keeping our local number and this also does not require us to be in any particular location. This opens up a range of options for us to consider where our registered office is based in future (and this is likely to remain in Cardiff).

### Next steps

We will be continuing to focus on employment, skills, well-being and sustainable development in the coming year, with a particular focus on place-based work and community economic development. Rhian Edwards, our leader on the Llechi, Glo a Chefn Gwlad project, is spending 2021 capturing how people of the Rhondda have experienced COVID-19 and the lockdowns. She is interviewing people and sharing their stories to build a strong picture of what has happened and what needs to happen now to build a stronger community going forward.

The PIAS project will hopefully launch as an independent initiative this year, with continuing support from People and Work.

We are hoping to build on the Green Light and Rhondda Web projects to develop a stronger skills base and promote local enterprise.

We will also continue to work with partners from across Wales to build greater understanding of what works in promoting community economic regeneration.

### Structure, governance and management

The Charity is a company limited by guarantee and does not have any share capital.

The Trustees, who are also the directors for the purpose of company law, and who served during the year and up to the date of signature of the financial statements were:

Dr C Sophocleous

A C McCaffer (Resigned 16 August 2020)

P G Watkins

G B Davies

J L Huyton

G J McHugh

R Robinson (Resigned 3 February 2020)

G D Lewis (Appointed 1 February 2021)

M McKibben (Appointed 1 March 2021)

D J Rees (Appointed 1 January 2021)

## PEOPLE AND WORK UNIT

### TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2020

---

G J Lewis

(Resigned 7 December 2020)

Unless otherwise determined by a General Meeting, the numbers of the members of the Governing Body shall not be fewer than six or more than thirty. The Governing Body shall from time to time appoint a member of the Governing Body, either to fill a casual vacancy or by way of addition to the Governing Body, provided that the prescribed maximum is not thereby exceeded. Any member so appointed shall retain their office until the next Annual General Meeting, but he or she shall then be eligible for re-election. None of the trustees has any beneficial interest in the company. All of the trustees are members of the company and guarantee to contribute £1 in the event of a winding up.

Dr Duncan Holtom heads up the research team working with Rhodri Bowen, senior researcher, and Heather Pells.

James Hall heads up our project and partnership work working with James Watts-Rees, Tomas Jenkins, Rhian Edwards and Ethan Jones.

Natasha Burnell leads on social enterprise and environmental sustainability.

Sarah Lloyd-Jones is the director and works with our Trustees – Ged McHugh (Chairperson), Jan Huyton (Vice-Chairperson), Phil Watkins (Treasurer), Gareth Lewis, Christala Sophocleous, David Rees, Mary-Ann McKibben and Gordon Davies.

Ann Churcher is the administrator.

#### Partnerships

People and Work assumes partnership working in all its activities and much of this report reflects that – whether it be with research colleagues, social enterprises, local authorities or other third sector groups and networks. James Hall leads on this for the Rhondda work (through the Stronger Rhondda informal network) and also links in with some networks beyond the traditional third sector. In Rhondda James Watts-Rees, Natasha Burnell and James Hall are all on the Boards of other organisations as a way of sharing learning, resources and best practice. James Watts-Rees is on the Board of Spectacle Theatre, Natasha Burnell is on the organising committee of St. Anne's Champions for Ynyshir (and helps organise things with others in the village) and James Hall is on the Boards of Create Your Space (Welcome to our Woods) and Cambrian Village Trust. James Hall also represents People and Work with networks convened by the Bank of England in Wales and Cardiff University Business School, and has been asked to contribute perspectives on the impacts of economic change in disadvantaged communities on a regular basis. He has also linked up one of the Business School professors and her students with Treorchy Chamber of Trade via its chairperson and there are now undergraduates and post-graduates basing some of their research into local economics on the transformation of Treorchy in recent years.

There are no related parties.

## **PEOPLE AND WORK UNIT**

### **TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT (CONTINUED)) FOR THE YEAR ENDED 31 DECEMBER 2020**

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The Trustees' report was approved by the Board of Trustees.

**G J McHugh**

Trustee

Dated: 11 June 2021

# PEOPLE AND WORK UNIT

## INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF PEOPLE AND WORK UNIT

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I report on the financial statements of the Charity for the year ended 31 December 2020, which are set out on pages 9 to 19.

### **Respective responsibilities of Trustees and examiner**

The Charity's Trustees, who are also the directors of People and Work Unit for the purposes of company law, are responsible for the preparation of the accounts. The 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. The charity's gross income exceeded £250,000 and I am qualified to undertake the examination being a qualified member of the Institute of Chartered Accountants in England and Wales.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

- (i) examine the financial statements under section 145 of the 2011 Act;
- (ii) to follow the procedures laid down in the general Directions given by the Charity Commission 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 financial statements presented with those records. It also includes consideration of any unusual items or disclosures in the financial statements, and seeking explanations from you as 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the next statement.

### **Independent examiner's statement**

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

- (a) which gives me reasonable cause to believe that in any material respect the requirements:
  - (i) to keep accounting records in accordance with section 386 of the Companies Act 2006; and
  - (ii) to prepare financial statements which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities; have not been met or
- (b) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the financial statements to be reached.

P E Lea FCA  
Dorrell Oliver Ltd

Chartered Accountant  
Linden House  
Monk Street  
Abergavenny  
Monmouthshire  
NP7 5NF

Dated: 11 June 2021

## PEOPLE AND WORK UNIT

### STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 DECEMBER 2020

		Unrestricted funds 2020 £	Restricted funds 2020 £	Total 2020 £	Unrestricted funds 2019 £	Restricted funds 2019 £	Total 2019 £
	<b>Notes</b>						
<b><u>Income and endowments from:</u></b>							
Donations and legacies	<b>3</b>	-	287,990	287,990	-	97,406	97,406
Charitable activities	<b>4</b>	139,504	-	139,504	196,552	-	196,552
Investments	<b>5</b>	4,026	-	4,026	954	-	954
Other income		-	10,893	10,893	-	13,105	13,105
<b>Total income</b>		<u>143,530</u>	<u>298,883</u>	<u>442,413</u>	<u>197,506</u>	<u>110,511</u>	<u>308,017</u>
<b><u>Expenditure on:</u></b>							
Charitable activities	<b>6</b>	<u>160,867</u>	<u>252,132</u>	<u>412,999</u>	<u>208,974</u>	<u>96,649</u>	<u>305,623</u>
Net gains/(losses) on investments	<b>11</b>	<u>897</u>	<u>-</u>	<u>897</u>	<u>1,273</u>	<u>-</u>	<u>1,273</u>
<b>Net movement in funds</b>		<u>(16,440)</u>	<u>46,751</u>	<u>30,311</u>	<u>(10,195)</u>	<u>13,862</u>	<u>3,667</u>
Fund balances at 1 January 2020		<u>94,769</u>	<u>23,747</u>	<u>118,516</u>	<u>104,964</u>	<u>9,885</u>	<u>114,849</u>
<b>Fund balances at 31 December 2020</b>		<u><u>78,329</u></u>	<u><u>70,498</u></u>	<u><u>148,827</u></u>	<u><u>94,769</u></u>	<u><u>23,747</u></u>	<u><u>118,516</u></u>

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# PEOPLE AND WORK UNIT

## BALANCE SHEET

AS AT 31 DECEMBER 2020

	Notes	2020 £	£	2019 £	£
<b>Fixed assets</b>					
Tangible assets	12		-		1,186
Investments	13		21,612		20,715
			<u>21,612</u>		<u>21,901</u>
<b>Current assets</b>					
Debtors	14	33,172		59,245	
Cash at bank and in hand		103,423		47,111	
		<u>136,595</u>		<u>106,356</u>	
<b>Creditors: amounts falling due within one year</b>	15	(9,380)		(9,741)	
Net current assets			127,215		96,615
<b>Total assets less current liabilities</b>			<u>148,827</u>		<u>118,516</u>
<b>Income funds</b>					
Restricted funds	16		70,498		23,747
Unrestricted funds			78,329		94,769
			<u>148,827</u>		<u>118,516</u>

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2020.

The Trustees acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing accounts which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to accounts, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 11 June 2021

G J McHugh  
Trustee

Company Registration No. 01809654

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2020

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### 1 Accounting policies

#### Charity information

People and Work Unit is a private company limited by guarantee incorporated in England and Wales. The registered office is Unit 1 @Loudon, Plas Iona, Bute Town, Cardiff, CF10 5HW.

#### 1.1 Accounting convention

The accounts have been prepared in accordance with the Charity's Memorandum and Articles of Association, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)" (as amended for accounting periods commencing from 1 January 2016). The Charity is a Public Benefit Entity as defined by FRS 102.

The Charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The accounts are prepared in sterling, which is the functional currency of the Charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. Thus the Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

#### 1.4 Incoming resources

Income is recognised when the Charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

#### 1.5 Resources expended

Direct charitable expenditure includes all expenditure directly related to the objects of the charity.

Costs have been apportioned as a percentage of project costs in line with the grant conditions. Salaries have been apportioned on a time basis.

#### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Computers	33.3% Straight line
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# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

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### 1 Accounting policies (Continued)

#### 1.7 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

#### 1.8 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less.

#### 1.9 Financial instruments

The Charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the Charity's balance sheet when the Charity becomes party to the contractual provisions of the instrument.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are measured at transaction price. Financial assets classified as receivable within one year are not amortised.

##### **Basic financial liabilities**

Basic financial liabilities, including creditors are recognised at transaction price. Financial liabilities classified as payable within one year are not amortised.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less.

##### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the Charity's contractual obligations expire or are discharged or cancelled.

#### 1.10 Employee benefits

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the Charity is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

#### 1.11 Retirement benefits

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

#### 1.12 Leases

Rentals payable under operating leases, including any lease incentives received, are charged as an expense on a straight line basis over the term of the relevant lease.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

### 2 Critical accounting estimates and judgements

In the application of the Charity's accounting policies, the Trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

### 3 Grant income

	2020	2019
	£	£
Grants receivable	287,990	97,406
	<u>287,990</u>	<u>97,406</u>
<b>Grants receivable for core activities</b>		
The Rank Foundation	57,900	17,900
Children in Need	5,000	7,500
Pen y Cymoedd	5,454	10,910
National Lottery	199,437	2,500
Waterloo Foundation	-	2,000
G Weston	-	45,000
Moondance Foundation	-	3,450
Confused. com	14,744	-
Other	5,456	8,146
	<u>287,990</u>	<u>97,406</u>

### 4 Charitable activities

	2020	2019
	£	£
Research income	139,504	196,552
	<u>139,504</u>	<u>196,552</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

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### 5 Investments

	<b>Unrestricted funds</b>	Unrestricted funds
	<b>2020</b>	2019
	<b>£</b>	£
Interest receivable	4,026	954
	<u>          </u>	<u>          </u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

### 6 Charitable activities

	Funded Action Research 2020 £	Research and Evaluation 2020 £	Total 2020 £	Total 2019 £
Staff costs	131,799	106,649	238,448	190,093
Depreciation and impairment	1,186	-	1,186	3,539
Research	1,329	11,307	12,636	29,797
Project costs	91,278	-	91,278	12,613
Activity and training	317	-	317	1,554
Printing, stationery and advertising	335	-	335	-
Phone	1,361	1,221	2,582	4,548
Conference and courses	5,169	622	5,791	9,980
Sundries	10,162	5,671	15,833	5,490
Insurance	1,543	-	1,543	800
Rent	4,906	-	4,906	5,294
Travel expenses	1,502	3,640	5,142	8,191
Books and subscriptions	1,245	1,633	2,878	1,877
IT	-	4,823	4,823	4,506
Interpreters and translators	-	6,532	6,532	11,001
	<u>252,132</u>	<u>142,098</u>	<u>394,230</u>	<u>289,283</u>
Share of support costs (see note 8)	-	15,156	15,156	14,000
Share of governance costs (see note 8)	-	3,613	3,613	2,340
	<u>252,132</u>	<u>160,867</u>	<u>412,999</u>	<u>305,623</u>
<b>Analysis by fund</b>				
Unrestricted funds	-	160,867	160,867	208,974
Restricted funds	252,132	-	252,132	96,649
	<u>252,132</u>	<u>160,867</u>	<u>412,999</u>	<u>305,623</u>
<b>For the year ended 31 December 2019</b>				
Unrestricted funds	-	208,974		208,974
Restricted funds	96,649	-		96,649
	<u>96,649</u>	<u>208,974</u>		<u>305,623</u>

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

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### 7 Description of charitable activities

#### Funded Action Research

Funded Action Research - Supporting people in education and skills programmes.

#### Research and Evaluation

Commissioned Research and Evaluation - Evaluating and researching as commissioned.

### 8 Support costs

	<b>Support costs</b>	<b>Governance costs</b>	<b>2020</b>	<b>2019</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Phone	1,148	-	1,148	1,773
Insurance	1,581	-	1,581	1,339
Rent	8,440	-	8,440	10,391
Bank Charges	3,987	-	3,987	497
Accountancy	-	3,613	3,613	2,340
	<u>15,156</u>	<u>3,613</u>	<u>18,769</u>	<u>16,340</u>
Analysed between				
Charitable activities	<u>15,156</u>	<u>3,613</u>	<u>18,769</u>	<u>16,340</u>

### 9 Trustees

None of the Trustees (or any persons connected with them) received any remuneration or benefits from the Charity during the year.

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

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### 10 Employees

#### Number of employees

The average monthly number of employees during the year was:

	<b>2020</b>	<b>2019</b>
	<b>Number</b>	<b>Number</b>
Project	4	3
Research	4	4
	<u>8</u>	<u>7</u>

#### Employment costs

	<b>2020</b>	<b>2019</b>
	<b>£</b>	<b>£</b>
Wages and salaries	200,781	163,313
Social security costs	13,466	11,160
Other pension costs	24,201	15,620
	<u>238,448</u>	<u>190,093</u>

There were no employees whose annual remuneration was £60,000 or more.

### 11 Net gains/(losses) on investments

	<b>Unrestricted</b>	<b>Unrestricted</b>
	<b>funds</b>	<b>funds</b>
	<b>2020</b>	<b>2019</b>
	<b>£</b>	<b>£</b>
Revaluation of investments	897	1,273
	<u>897</u>	<u>1,273</u>

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2020

#### 12 Tangible fixed assets

	<b>Computers £</b>
<b>Cost</b>	
At 1 January 2020	17,747
At 31 December 2020	<u>17,747</u>
<b>Depreciation and impairment</b>	
At 1 January 2020	16,561
Depreciation charged in the year	1,186
At 31 December 2020	<u>17,747</u>
<b>Carrying amount</b>	
At 31 December 2020	-
At 31 December 2019	<u><u>1,186</u></u>

#### 13 Fixed asset investments

	<b>Listed investments £</b>
<b>Cost or valuation</b>	
At 1 January 2020	20,715
	897
At 31 December 2020	<u>21,612</u>
<b>Carrying amount</b>	
At 31 December 2020	<u>21,612</u>
At 31 December 2019	<u><u>20,715</u></u>

#### 14 Debtors

	<b>2020 £</b>	<b>2019 £</b>
<b>Amounts falling due within one year:</b>		
Trade debtors	33,172	59,245
	<u><u>33,172</u></u>	<u><u>59,245</u></u>

## PEOPLE AND WORK UNIT

### NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

#### FOR THE YEAR ENDED 31 DECEMBER 2020

#### 15 Creditors: amounts falling due within one year

	2020 £	2019 £
Accruals and deferred income	9,380	9,741

#### 16 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds			Movement in funds			
	Balance at 1 January 2019 £	Incoming resources £	Resources expended £	Balance at 1 January 2020 £	Incoming resources £	Resources expended £	Balance at 31 December 2020 £
Project funds	9,885	110,511	(96,649)	23,747	298,883	(252,132)	70,498

#### 17 Analysis of net assets between funds

	Unrestricted 2020 £	Restricted 2020 £	Total 2020 £	Unrestricted 2019 £	Restricted 2019 £	Total 2019 £
Fund balances at 31 December 2020 are represented by:						
Tangible assets	-	-	-	883	303	1,186
Investments	21,612	-	21,612	20,715	-	20,715
Current assets/ (liabilities)	56,717	70,498	127,215	73,171	23,444	96,615
	<u>78,329</u>	<u>70,498</u>	<u>148,827</u>	<u>94,769</u>	<u>23,747</u>	<u>118,516</u>

#### 18 Remuneration of key management personnel

The remuneration of key management personnel is as follows.

	2020 £	2019 £
Aggregate compensation	35,177	28,841