

# Annual Report 2021

## People and Work annual report 2021

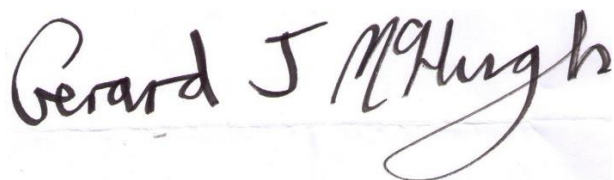
### Foreword

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

---

<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

---

<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	

---

# PEOPLE AND WORK UNIT

## CONTENTS

---

	<b>Page</b>
Trustees' report	1 - 7
Independent examiner's report	8
Statement of financial activities	9
Balance sheet	10
Notes to the financial statements	11 - 19

---

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT )

FOR THE YEAR ENDED 31 DECEMBER 2020

---

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

---

### 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

---

#### *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

---

##### 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

---

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.

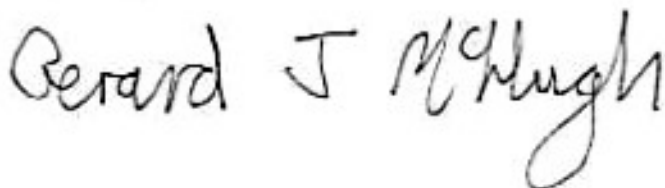
## PEOPLE AND WORK UNIT

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

---

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, looping 'G' and 'H'.

# PEOPLE AND WORK UNIT

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF PEOPLE AND WORK UNIT

---

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

---

### 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
-----------	---------------------

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

---

### 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

---

### 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

---

#### 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	Unrestricted funds
	2020 £	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

---

<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	

---

# PEOPLE AND WORK UNIT

## CONTENTS

---

	<b>Page</b>
Trustees' report	1 - 7
Independent examiner's report	8
Statement of financial activities	9
Balance sheet	10
Notes to the financial statements	11 - 19

---

# PEOPLE AND WORK UNIT

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT )

### FOR THE YEAR ENDED 31 DECEMBER 2020

---

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**

---

### **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

---

#### ***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**

---

### **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

---

### 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**

---

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

---

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

---

### 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
-----------	---------------------

# PEOPLE AND WORK UNIT

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2020

---

### 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

---

### 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

---

### 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

---

### 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
	<hr/>	<hr/>
	8	7
	<hr/> <hr/>	<hr/> <hr/>

#### 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
	<hr/>	<hr/>
	238,448	190,093
	<hr/> <hr/>	<hr/> <hr/>

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
	<hr/> <hr/>	<hr/> <hr/>

## 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