

# EY UP!

HEALTH & HAPPINESS  
FOR YORKSHIRE FOLK

## ANNUAL REPORT AND ACCOUNTS 2020/21



Registered Charity No. 1055931

Supporting the work of



**South West  
Yorkshire Partnership**  
NHS Foundation Trust

# CONTENTS

## 1. TRUSTEE REPORT

- Introduction
- Objectives and activities
- Achievements and performance
- Financial review
- Plans for the future
- Structure, governance and management
- Reference and administrative details
- A big thank you

## 2. ACCOUNTS

- Statement of Trustee responsibilities
- Independent examiners report on the financial statements
- Financial statements



David, Dave and Rob took on the Yorkshire 3 Peaks Challenge in September 2020 and raised £250

# TRUSTEE REPORT



## INTRODUCTION

The Corporate Trustee presents the EyUp! and its linked charities annual report, together with the financial statements for the year ended 31 March 2021.

The annual report and accounts for the year ended 31 March 2021 have been prepared in accordance with the Charities Act 2011 and the Charities (Accounts & Reports) Regulations 2008.

## OBJECTIVES AND ACTIVITIES

EyUp! exists to benefit the service users of South West Yorkshire Partnership NHS Foundation Trust (the Trust) across Barnsley, Calderdale, Kirklees and Wakefield. Our funds are not used to support NHS services but to enable us to provide the extras above and beyond normal NHS funding.

These can be extras for inpatient ward areas, such as games and activities, equipment for visiting rooms, resources for sports or creative activities, trips for service users or funding for community groups.

Our objectives as set out in the Trust Deed are:



*FOR ANY CHARITABLE PURPOSE OR PURPOSES RELATING TO THE NATIONAL HEALTH SERVICE WHOLLY OR MAINLY FOR THE SERVICES PROVIDED BY SOUTH WEST YORKSHIRE PARTNERSHIP NHS FOUNDATION TRUST*



During the year the charity:

- funded £142k for 64 projects to be spent on the objectives of the charity, with designated fund holders spending an additional £11k. These projects will benefit over 8,000 staff, volunteers, and service users across the Trust
- welcomed Stephanie Hirst as an ambassador
- became a member of NHS Charities Together and was awarded £267k in grants
- continued to sell their own eco-friendly mugs and Christmas cards
- continued to promote and encourage applications for support from the charity
- used social media to promote the EyUp! brand
- supported staff and volunteer wellbeing during the COVID pandemic
- received 145 items donated from the EyUp! Amazon wishlist which were distributed to staff and service users over the first lockdown period
- held a successful charity challenge which raised £2,500 for EyUp!

# ACHIEVEMENTS AND PERFORMANCE

## GRANT EXPENDITURE

During the year, the committee approved £142k funding for 64 projects to be spent on the objectives of the charity, with designated fund managers spending an additional £11k. These projects will benefit over 8,000 staff, volunteers, and service users across the Trust. Below are examples of the projects supported:

### BARNSELEY

£300 was awarded to the **neuro rehab** and **stroke units** at Kendray hospital to purchase a variety of items, including, games, books, jigsaws and games and accessories for their Nintendo Wii.

**Children's therapy** were granted £243 to purchase demonstration dolls which are used to demonstrate correct handling techniques, how to position a child in a piece of equipment and how to carry out therapeutic activities. The team use these in therapy groups and were extremely useful for video consultations over the last 12 months.

### CALDERDALE

£461 was awarded to the **intensive home based treatment team** to provide a 'self-care package' to carers. These packages included candles, lavender bags, chocolate hearts, self-care tips, mindfulness exercises.

**EIP (early intervention in psychosis)** were awarded £481 to purchase an Xbox 1, online subscription and games to set up an online gaming group to reduce social isolation and bring human interaction to service users during lockdown.

### KIRKLEES

**Ward 18** in Dewsbury were awarded £180 to purchase a stock of clothing to provide to new admissions on the ward, some of whom arrive with few belongings or appropriate clothing to help them feel safe, improve their experience and maintain privacy and dignity.

£297 was awarded to the **older people's community mental health team** for activity items to send to service users at home. Items included seeds, compost and plant pots, colouring books and pencils, puzzle books and wool and knitting needles.



## WAKEFIELD

CAMHS REACH team (who provide urgent and home based treatment and support for young people) were awarded £1,015 to create and deliver wellbeing packs to the young people they support. These included mindfulness colouring and challenges, positive quotes and face paints, the packs were a way of keeping young people occupied, whilst letting them know the team was there for them.

The following quotes were from the young people who received the packs

“

*I DIDN'T EXPECT THIS... IT'S REALLY NICE*

”

“

*IS THAT FOR ME? OH WOW - THAT'S AMAZING!*

”

“

*WHAT HAVE I DONE TO DESERVE THIS?*

”



Horizon Centre at Fieldhead (which is a specialist short term assessment and treatment unit for people with a learning disability) were awarded £944 to purchase items for their outside area, including outdoor games and activities, seating and decorations.



## FORENSIC SERVICES

Newton Lodge were awarded £1,846 to purchase items for 7 wards within the unit. This included gardening equipment, pamper packs, outdoor and indoor games and activity sets.

Waterton Ward were awarded £310 to purchase a digital camera. This is used to teach photography, produce art and to record different snippets and memories of therapies undertaken by the service users.

## TRUSTWIDE

The perinatal mental health team helps women during and after pregnancy, this includes peer-led support sessions. The team was awarded £530 for wellness packages to give to women approaching discharge from the service. The packages included pocket sized flash cards with self-care tips, meditation and breathing exercises, colouring sheets and information on websites and alternative therapies.

*THANK YOU SO MUCH FOR THE WELLNESS PACKAGE, I CRIED WHEN I OPENED IT, I CAN'T BELIEVE YOU TOOK SO MUCH TIME TO MAKE THE BOX, ESPECIALLY FOR ME. I'VE BOUGHT MORE COLOURING AND SPECIAL CRAYONS AND I'VE FOUND IT REALLY HELPFUL WHEN I FEEL OVERWHELMED*

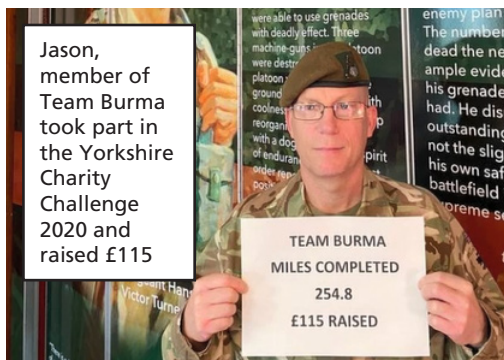


During lockdown EyUp! funded wellness packages for service users of our Perinatal Services.



£46,011 of the NHS Charities Together stage 1 grant was used to purchase water bottles and well-being packs which were distributed to **every member of staff, volunteer, and governor.**

**WELL! I RECEIVED MY WELLBEING PACK THROUGH THE POST AND WHAT CAN I SAY - IT'S FANTASTIC! THANK YOU SO VERY MUCH TO EVERYONE INVOLVED IN SELECTING, BUYING, PACKING AND DISTRIBUTING THEM. I DON'T KNOW WHO THOUGHT ABOUT WHAT SHOULD GO IN THE PACKS, BUT THEY ARE ABSOLUTELY PERFECT FOR TIRED, BUSY, HARD-PRESSED STAFF. I CAN TELL THAT EVERY SINGLE ITEM HAS BEEN CHOSEN WITH GREAT CARE AND THOUGHT**



Charlene-Sibanda, BAME workforce health and wellbeing practitioner funded by EyUp!

## FUNDRAISING

COVID-19 affected the normal fundraising activities of EyUp! as regular events such as the Christmas fairs and football tournament could not take place. We would like to thank members of staff and the public for taking part in events and fundraising for us.

- Income continues from the EyUp! lottery £33,976
- Launched a charity challenge to walk / run the perimeter of Yorkshire to raise funds for veteran service users. 36 people took part, walking 2,731 miles and raising £2,500
- A group of truck drivers organised a convoy on the M62 in July 2020 and raised £1,020
- Two members of the public completed the Lyke Wake challenge and raised £554
- A team of 3 completed the Yorkshire Three Peaks and raised £250
- Received gifts in kind from members of the public and corporate companies totalling £2,682, including Fox's Biscuits and Ravensburger
- A young member of the community made scented teacup candles and raised £129; and
- Held a raffle for a Peloton bike and subscription which was donated to EyUp! this raised £1510.

EyUp! pays for a fundraiser who coordinates the in-house events and supports individuals who want to raise funds for EyUp!. In March 2021 the Trustee approved EyUp! to become a member of the Fundraising Regulator and as such will follow the Code of Fundraising Practice. Any individual raising funds for EyUp! has an agreement to sign beforehand. No complaints were received in 2020/21 in respect of fundraising activities of EyUp!

## NHS CHARITIES TOGETHER

EyUp! became a member of NHS Charities Together in April 2020. The charity supports all NHS charities and received over £150m in public donations in response to the COVID-19 pandemic. By becoming a member EyUp! was eligible to receive grant funding from NHS Charities Together.

- Stage 1 distributions 1 and 2 funding – Monies received to deal with the immediate impact of COVID-19 - £66,500 was received. This money was used for both staff and service users impacted by the first wave and lockdown.





- Stage 1 distribution 3 funding - £50,000 was successfully bid for, £25k was to support the wellbeing at work offer for black, Asian and minority ethnic (BAME) staff and £25k to help service users in BAME communities in North Kirklees.
- Stage 2 funding – Monies have been given to an Integrated Care System (ICS) lead charity for each area. Organisations are able to apply for this. Applications have been made for funding by Creative Minds.
- Second wave urgent response funding - £50,000 was received when West Yorkshire went into Tier 2
- Donation from Starbucks through NHS Charities Together - £2,100
- Stage 3 funding - £99,000 is ringfenced for EyUp! to bid for, a successful bid of £58,267 was made to support carers and work is ongoing on a bid to apply for the remaining monies which will be expended in 2021/22 and 2022/23. The focus of this is workplace wellbeing.

Without the funding from NHS Charities Together EyUp! would not have been able to support staff, volunteers, and service users as much as they have over the last 12 months.

## *PLANS FOR THE FUTURE*



The Trustee recognises that the fundraising activities have changed over the last 12 months and is grateful for the monies from NHS Charities Together. Depending on national guidelines we hope to begin some fundraising events towards the end of 2021/22. Expenditure on small grants will continue at a higher rate in 2021/2022 as well as further expenditure of the NHS Charities Together grants. Other planned activities include:

- Attract further ambassadors for the charity
- Increase corporate fundraising
- Continue to promote EyUp! with staff and service users to generate more fundraising and wider use of funding
- Increase the public uptake of the EyUp! lottery
- Increase community fundraising
- Register with the fundraising regulator



Creative Minds®

**Launched in 2011, Creative Minds became a linked charity of EyUp! in 2016, and focusses on the use of creative approaches and activities in healthcare; increasing self-esteem, providing a sense of purpose, developing social skills, helping community integration and improving quality of life.**

Our linked charity develops community partnerships to not only co-fund but also co-deliver projects for local people and all the projects are supported on a match-funded basis. The term match-funded refers to the requirement of partners to provide funding of an equal or greater basis for each project.

Creative Minds considers bids for funds through locality collectives made up of service users/carers, Trust staff and community representatives. The collectives look for a balanced portfolio of projects across the Trust districts, taking into account the types of activity, the client group and the service that will benefit. Where projects show a weakness in any of the categories, support is given to the organisation to look for a way forward.

Creative Minds is an award-winning approach: Health Service Journal Compassionate Patient Care Award 2014, Patient Experience Network Award 2015 and Building Better Health Care Award 2016. In 2018, Creative Minds was named Disability Sports Yorkshire Organisation of the Year, which we are very proud of.

Building on the work completed with funding from Health Foundations Q Exchange funding, Creative Minds have been further developing our community reporting model for evaluating projects and understanding the needs of our community. Community reporters have been trained across the Trust geographic areas to understand the experiences of people from black, Asian and minority ethnic and other vulnerable groups in terms of the impact of COVID-19 and how creative activities might help. Funding has been received from NHS Charities Together and Association of Mental Health Providers to develop projects that will meet their needs. The learning will be shared at the virtual Microsystems Festival 2021.

In response to the ongoing situation with COVID-19, Creative Minds have worked with our partners to support project participants very differently. Partners have been keeping in contact with participants by phone in terms of support and delivered projects remotely via websites, mail outs and social media. Links to online content that offer support or engage people in creative activities online were posted online. There has been a big increase in the



Creative Minds®



numbers of people we have connected with using these methods and we will look at how this might shape future projects. Creative Minds has also been linking with the Trust's Recovery Colleges and other community organisations to share ideas and supporting each other.

Work on 'Safety nets', a young people's sport and wellbeing programme, is continuing to grow and develop across Yorkshire. In response to COVID-19 an online version of the programme "Home goals" has been developed and is being supported by CAMHS teams across the Trust. Creative Minds have also started to develop a 'buddy scheme' in Barnsley with funding from public health. Our approach is looking at developing a much broader accredited scheme that will involve local clubs and groups to host our volunteer buddies. The singing project funded by Children in Need has been adapted to be delivered virtually, and a film to encourage participants to attend was developed.

<https://www.youtube.be/vIM53ZhOeYw>

**CREATIVE MINDS SUPPORTED 33 PROJECTS IN 2020/21 WITH 94 PARTNERS, DELIVERING OVER 12,000 CONTACTS WITH SERVICE USERS, BELOW ARE SOME EXAMPLES.**

## **BARNSELY**

**Barnsley libraries** were awarded £1,500 to produce online videos which were shared on social media platforms, including story and rhyme videos to be shared with families at home during lockdown, online stories in a variety of formats including song and rhyme, spoken word, Makaton and British Sign Language and special guest videos.

**Creative Recovery** were awarded £3,000, to hold weekly online sessions, including artmaking, poetry, meditation and short films. The money was also used to produce an online portal of content and to send out UPLIFT packs for service users who are not online.



Creative Minds®

## CALDERDALE

**Verd de Gris** were awarded £1,600 for “Behind The Mask”, a series of weekly multi-platform online sessions for women experiencing anxiety and stress through isolation.

**Handmade Parade** were awarded £3,000 for the “Release” project, which represents the freedom of birds, whether it is escaping the confines of lockdown, own minds or mental health struggles, physical environment, home circumstance or being detained under the Mental Health Act. Participants, including inpatient units across Calderdale, created birds which were photographed and uploaded to an online gallery.



## KIRKLEES

**TSL** were awarded £1,000 for “Words in Mind”, a project to create an anthology to document how COVID-19 has influenced the lives of people in Kirklees and to record it as a work of social history for the future. The project enabled the participants to focus on the positives in their lives and reflect on good experiences to help channel feelings and emotions in a positive way.

**Huddersfield Mission** were awarded £1,000 for their “Moodwriting” project which sent a mail out to 500 people containing a range of creative ideas and information. The mailing highlighted the need to look after our wellbeing, encouraged creative writing and highlighted support services available.



## WAKEFIELD

**Dream Time Creative** were awarded £2,700 for “Doorstep Creations” to produce packs with contents and instructions to make different creative items, including rag rugs. The project aimed to deliver creativity to homes to allow participants respite through creativity.



If you feel that the Creative Minds approach could help you to find a creative passion that would improve your health and wellbeing, get in touch at [creativeminds@swyt.nhs.uk](mailto:creativeminds@swyt.nhs.uk) and find more information at [www.creativemindsuk.com](http://www.creativemindsuk.com)

## PLANS FOR THE FUTURE



Creative Minds is 10 years old this year. To mark this milestone, a series of events and activities will be held throughout the year, depending on COVID-19 restrictions. This will include:

- A magazine evaluation issue with a focus on research and development
- Creative Minds live event to showcase projects and partners in each of our localities
- A ‘10 years of Creative Minds’ article to follow up on our academic journal entry in 2015
- Exploring the development of Creative Minds Radio on a digital platform for live streaming and podcasts
- Good Mood football league and learning disability fun days with Euro 21 and Olympic themes
- A range of merchandise to mark the 10 year anniversary including t-shirts pens, mugs etc.



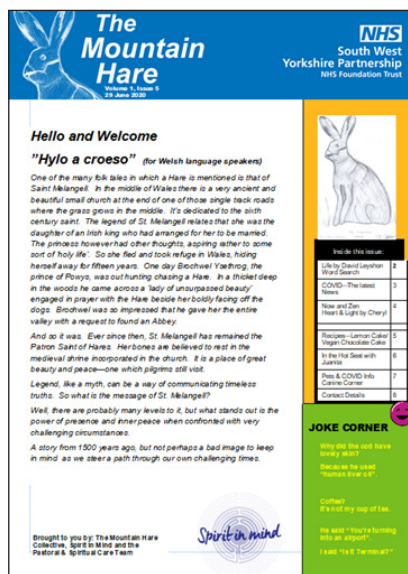
**Spirit in Mind ("SIM") links faith-based organisations with SWYPFT. Working with faith leaders, community workers and SWYPFT staff SIM promotes a deeper awareness in the wider community of mental health priorities and encourages local responses to supporting people with mental health needs. SIM was awarded charity status in May 2017.**

SIM's activity over the past twelve months has largely taken place online. This has involved the transfer of the training events and professional development and networking programme outlined in the 2020/21 annual report onto digital platforms.

SIM's three charitable objects have been achieved by innovative patterns of co-working between SIM associates and pastoral care staff and volunteers.

This has included a regular mental health and wellbeing publication detailing sources of Covid support and advice, developed to maintain contact with people at risk of social isolation, particularly mental health service users. Published on a three-weekly basis 'The Mountain Hare' includes humour and practical health related advice together with contributions from service users in both print and digital form. Discussions with stakeholders are currently underway regarding the continuation of the publication post-Covid in a format which provides opportunity for greater in-depth reporting of developments in holistic approaches to mental health care and recovery.

Successful funding applications to two canine charities have allowed the further roll out of the canine befriending service available on Trust wards, in care homes and other residential facilities. Four canine befrienders have been recruited, trained and registered through the scheme and as well as befriending duties they will also be taking on a SIM promotional role at public and other events.



The online programme of SIM events over the past twelve months has included:

- Interfaith workshops on Christian and Muslim understandings of mental health
- 'Shining light on death' – interfaith explorations of bereavement and loss
- Islamic awareness training for NHS staff
- Virtual retreat days for healthcare staff and community leaders
- Compassion hub meetings
- 'Overcoming anxiety' workshops
- Beginners and improvers courses in mindfulness.

In addition, over the past twelve months SIM has given online presentations of the charity's work to several national and regional organisations:

- London Boroughs for Faith Based Social Action Network
- Calderdale Interfaith AGM
- Brahma Kumaris Spiritual University
- Al Balagh Islamic Academy
- Bahai Interfaith Network



## ***PLANS FOR THE FUTURE***



Over the next 12 months SIM plans to build on existing close working relationships with local faith-based organisations to develop community-based responses to Covid-related mental health concerns.

As well as continuing to provide a programme of training and community building events, SIM is also actively seeking additional funding to provide appropriate training and supervision for faith-based organisations to develop support initiatives around social isolation and bereavement and loss.

If circumstances allow, the well-established conference programme will continue with further large-scale events bringing together a wide cross-section of faith leaders, community activities and NHS professionals around topics of shared mental health concern.

**The Mental Health Museum (MHM) has been a linked charity since 2014 and is located in the heart of Fieldhead Hospital, Wakefield. The museum's extraordinary collection aims to support the empowerment of people; joining people together to combat mental health stigma, prejudice and promote mental wellbeing. The museum works with its communities to co-create a mindful, knowledgeable and active society.**

Due to the current situation with COVID-19 the Museum is closed to the public. The MHM is exploring how the museum might be accessed virtually and how it can offer activities and contact delivered remotely via websites, mail outs and social media.

During 2020/21 the museum:

- Worked with Art Café members to collect stories of everyday life during the pandemic and associated lockdowns. These were turned into 'The Virus Times' newsletters as part of the 'Empowering Heritage Project' and can be found on the Arts Café's website: [www.artscafeevents.org](http://www.artscafeevents.org)
- Compiled a survey on visitor services at the Museum. This was made available to Trust staff online and the responses have been collated
- Met remotely with the psychology team at The Bretton Centre to discuss future work and the formation of a service user group to look at the Museum's collection, potentially with an aim of co-curating an exhibition
- Worked on listing and repackaging the collections and organising a refurbishment of stores to help us achieve accredited status
- Developed resources and activity packs to distribute to food banks/charities in the area who serve vulnerable children
- Undertaken the necessary risk assessments and implemented the recommendations to make the Museum Covid safe to reopen once government guidance permits
- Investigated collections software programmes to be able to put our collections catalogue on our website. A software package would also help us organise the collection for accreditation
- Built content to enhance our social media presence and set up an Instagram account
- Worked with second and third-year students at Huddersfield University providing teaching around our collection and facilitating the co-production of new interpretation for the museum



- Worked to develop our partnership with the library services, including exploring options for developing our book loan service
- Devised an exhibition strategy including a temporary exhibitions programme to include new displays from Hands on History (Huddersfield University) and Outside In, following the launch of new artwork display by Pauline Quininn
- Supported two applications to the Arts and Humanities Research Board. These explore the changing language relating to mental health (with Cambridge University) and the experience of refugees in the mental health system following World War 1 (with Huddersfield University).



The Empowering Heritage Project took place at the MHM between May 2019 – Dec 2020, funded by the National Lottery Heritage Fund. The ambitious project set out to develop and share more widely the collections of the Mental Health Museum in Wakefield and deliver community engagement activity that made a measurable difference to the lives of some of the most vulnerable and marginalised people in the area.

In the timeframe of the project, we have faced unprecedented challenges nationally due to the pandemic, which has placed even greater pressures on individuals. Despite this, the project has delivered substantially against its original objectives, as well as addressing these new demands, offering a crucial lifeline to those who needed it.



The connection to the collection and history has given the project greater weight and validation. There is a great deal more that can be done to continue to engage service users and the public in this evolving conversation and the MHM is well-placed to lead this with the right level of capacity and resources. The project has shown the potential to work in partnership with other museums to help them to explore the history of mental health.

Covid certainly challenged the project, but it also highlighted the value of an agile small resource in adapting to circumstances. Extending the project timescale has also showed the benefits of a longer-term approach. The MHM is now in a better position to understand its future and potential.







## *PLANS FOR THE FUTURE*



- Continuing the process of achieving accreditation and preparing our submission in collaboration with Museum Development Yorkshire by working on documentation, including drafting the Forward Plan 2021-2026;
- Future exhibitions include the launch of new artwork display by local artist Pauline Quinnin, Hands on History by Huddersfield University students and new artworks generated through the Outside In Patient Artwork programme
- Launching our online museum offer to ensure our collection is more accessible to people who cannot visit in person
- Launching a new display case and interpretation of the Mary Frances Heaton samplers to build on the national and international interest
- Involvement in the showcasing of Mary Frances Heaton's story in the form of an opera
- Developing a wellbeing offer that supports recovery
- Continuing to audit, repackage and relocate our collection
- Continuing to develop our partnerships across the Trust.

# FINANCIAL REVIEW

## HOW WE FUNDED OUR WORK, ACHIEVEMENTS AND PERFORMANCE

In 2020/21, the charities received income of £872k and spent £565k. At the end of the year the charities had a balance of £866k.

### **EyUp!**

EyUp! received income of £339k from donations, fundraising, sale of goods, lottery, grants, and interest. This includes:

Donations and trading activities (which include the EyUp! lottery and fundraising events) have decreased from £77k (2019/20) to £67k (2020/21). This reduction was due to COVID-19 as we have been unable to hold our regular fundraising events. These donations are mainly from staff, service users, carers, relatives, and friends. An additional restricted donation of £45k was received in respect of NHS Wakefield CCG.

£227k was received in the form of grants from NHS Charities Together.

Expenditure of £195k was spent on grant making, staff costs, administration fee, and prizes and admin costs relating to the lottery. A wide variety of purchases were funded, ranging in value, and as exemplified in the aforementioned projects.

At 31 March 2021 EyUp! had funds carried forward of £344k.

### **CREATIVE MINDS**

Creative Minds received income of £460k, of which £281k was received from the Trust. Other income was from grants (including £25k from Barnsley Council, £97k from Calderdale CCG and £40k from the Association of Mental Health Providers), interest and a few small donations.

During the year expenditure of £296k was spent, £76k was on small grants, £217k on staff costs (including staff time on grant projects) and £3k on administrative costs.

At 31 March 2021 Creative Minds had funds carried forward of £487k.



## ***MENTAL HEALTH MUSEUM***

Mental Health Museum received income of £61k, of which £60k was received from the Trust, and the remaining income was from donations.

Expenditure of £64k was spent in year, this was on staffing (this includes staff time on the Heritage Lottery Fund project) and minimal expenditure in other areas.

At 31 March 2021 Mental Health Museum had funds carried forward of £32k.

## ***SPIRIT IN MIND***

Spirit in Mind received income of £12k, of which £9k was received from the Trust and £3k in grants.

Expenditure of £10k was spent in year. The majority (£9k) relates to staff costs, £1k relates to the activities of Spirit in Mind including the canine befriending project and training, and minimal expenditure on administration.

At 31 March 2021 Spirit in Minds had funds carried forward of £3k.

**A wide variety of purchases were funded, ranging in value and as exemplified in the aforementioned projects.**



# HOW WE MANAGE THE MONEY

## OUR GRANT MAKING POLICY

### EyUp!

EyUp! makes grants from its unrestricted funds, both general and designated funds. Any applications requesting grants over £5000 are referred to the Charitable Funds Committee for a final decision.

- **General funds** – these funds are received with no particular preference expressed by donors. The income generated by the lottery is also received into general funds. On a quarterly basis, bids are invited from all services and wards across the Trust. These are then assessed by a sub-committee of Trustwide clinical and non-clinical staff who award funding based on the application, looking at the benefits of the proposal.
- **Designated funds** – are established for a particular ward or service. Each fund has a designated fund manager who authorises expenditure from these funds at any time. The Trust's finance department check that the expenditure is appropriate to the overall purpose of the charity.

### CREATIVE MINDS

Creative Minds develops community partnerships to co-fund and co-deliver projects for local people and all the projects are supported on a match-funded basis. The term match-funded refers to the requirement of partners to provide funding of an equal or greater basis for each project.

Creative Minds invites applications for funding for each locality they work in annually. Applications are assessed through locality collectives made up of service users, carers and Trust staff using the Young foundation community development tool. Where projects show a shortfall, the collectives try to work with the organisation to strengthen the bid. The collectives also look for a balanced portfolio of projects across the Trust districts, taking into account the types of activity, the client group and the service that will benefit.

The Mental Health Museum and Spirit in Mind do not make grants.



## **RISK ANALYSIS**

The Trustee reviews risk as part of the charity action plan at each meeting and within the business plan. The main risk facing the charities is financial sustainability.

- The EyUp! fundraiser was appointed (part-time) to mitigate this by being a dedicated resource to increase income through several different funding streams. The effectiveness of this is reviewed at each meeting and success is being achieved. A risk remains that this is just one member of staff that may leave or fall ill.
- The linked charities are revising their strategies and producing clear business plans which will be actioned and monitored to ensure they are sustainable for the future. Work has progressed in 2020/2021 and will continue in 2021/2022.
- COVID-19 remains a risk in 2021/2022. This affects fundraising activities and how we deliver some grant activity, this will be monitored closely as national rules and guidance changes.
- The impact of COVID-19 on local businesses and grant givers may see the opportunity of funds reduce.

## **OUR INVESTMENT POLICY**

The current policy (agreed in December 2019) is to invest funds in a mix of deposit accounts. The Corporate Trustee takes a prudent approach to investment and holds the funds in low risk deposit accounts across various providers.

## **OUR RESERVES POLICY**

Under the guidance of the Charities Commission booklet 'CC19, Charities Reserves' and 'Charity reserves: building resilience', the Corporate Trustee agreed the following reserves policy, which is reviewed annually.

### **EyUp! RESERVES POLICY**

Funds held by EyUp! that are unrestricted are classed as reserves under Charities SORP (FRS 102).



The charity has a general legal duty to apply charitable funds within a reasonable time of receiving them. The Corporate Trustee actively encourages fund managers to spend their funds and encourages staff to bid against the general purpose funds.

The Trustee policy is to keep funds to the minimum required to cover approved commitments in the belief that donations are made with the intention and expectation that they will be spent accordingly.

In order to avoid the risk of the charity's reserves becoming overdrawn it is considered prudent to hold a minimum 3 months' operating expenditure, plus one year's salary for the fundraiser post. This is calculated at £34k. If the balance fell to this level then the committee would revise the strategy and plan for the charity.

The reserves currently stand at £81k and are calculated as follows:

Total unrestricted funds of	£200k
Less designated funds	(£119k)
<b>Total reserves</b>	<b>£81k</b>

The Trustee reviews the balances held in designated funds, in accordance with the provisions of the NHS Acts relating to charitable funds, to determine whether these funds are likely to be committed in the near future and the extent to which there is a continuing need identified for any particular designated fund(s). The funds are reviewed on an annual basis and any inactive funds are closed and the balance transferred to general funds.

Expenditure is reviewed quarterly at the Charitable Funds Committee to ensure that the minimum level of reserves is maintained. Reserves are currently slightly higher than the minimum required, it is anticipated that these will reduce further in 2021/22 to be in line with the expected reserves.

### **CREATIVE MINDS RESERVES POLICY**

Creative Minds is funded by specific grants for projects and by general contribution by the Trust. Monies given as specific grants are classed as restricted and are excluded from the reserves policy. A minimum of one month's operating expenditure is held as reserves. A significant proportion of Creative Minds' expenditure is planned grant expenditure, so if funds are reduced to this level then plans can be revised.



## ***MENTAL HEALTH MUSEUM RESERVES POLICY***

The Mental Health Museum is primarily funded by specific grants with small donations by visitors. Monies given as specific grants are classed as restricted and are excluded from the reserves policy. The Trustee has deemed that at this point the charity does not need to hold reserves.

## ***SPIRIT IN MIND RESERVES POLICY***

Spirit in Mind is primarily funded by specific grants. Monies given as specific grants are classed as restricted and are excluded from the reserves policy. The Trustee has deemed that at this point the charity does not need to hold reserves.

## ***VOLUNTEERS***

EyUp! and its linked charities would like to thank all the volunteers who have contributed to the charities in 2020/21. This includes being part of the running of the charities and helping make grant funding decisions for Creative Minds. They have all contributed to the success and growth of the charities and the charities continue to be grateful for their help and time.

## ***AMBASSADORS***

Ambassadors do not have any formal role in the governance of the charity but assist by gaining publicity and raising our profile:

- Ashley Jackson - Painter
- Horatio Clare - Author and broadcaster
- Stephanie Hirst - Radio presenter and broadcaster



# STRUCTURE, GOVERNANCE AND MANAGEMENT

South West Yorkshire Partnership NHS Foundation Trust is the Corporate Trustee of the Charity governed by the law applicable to Trusts, principally the Trustee Act 2000 and the Charities Act 2011.

## CORPORATE TRUSTEE

The Corporate Trustee comprises the non-executive and executive directors of the Board of South West Yorkshire Partnership NHS Foundation Trust (SWYPFT) and meets quarterly. Non-executive directors are appointed by the governors of the Trust and executive directors are subject to the Trust's recruitment policies. When directors join the Corporate Trustee, they are introduced to the charity, its objectives, and Charity Commission guidance (CC3).

The members of the Corporate Trustee have read and had regard to the Charity Commission's guidance on public benefit. They give their free time freely and do not receive any pay, emoluments, or other financial benefit.

Those who served on the Corporate Trustee during the period were as follows:

Angela Monaghan	Chair
Charlotte Dyson	Deputy chair / Senior independent director
Laurence Campbell (left 31/08/20)	Non-executive director
Mike Ford (appointed 01/09/20)	Non-executive director
Chris Jones	Non-executive director
Erfana Mahmood	Non-executive director
Kate Quail	Non-executive director
Sam Young	Non-executive director
Rob Webster	Chief executive
Tim Breedon	Director of nursing and quality / Deputy chief executive
Mark Brooks	Director of finance and resources
Alan Davis	Director of human resources, organisational development and estates
Dr Subha Thiyaagesh	Medical director



## CHARITABLE FUNDS COMMITTEE

The Corporate Trustee is supported in its responsibilities and duties by the Charitable Funds Committee, which meets quarterly. Its duties include managing the Trust's charitable funds in accordance with statutory requirements; ensuring expenditure is in line with the objects of the charities; delegating responsibility for the management of designated charitable funds and the linked charities; fundraising for the charity; ratifying the annual report and accounts; and reviewing the effectiveness of the Committee.

### **The members of the Charitable Funds Committee during the period were as follows:**

Erfana Mahmood (Committee Chair)	Non-executive director
Charlotte Dyson (left 15/09/2020)	Deputy chair / Senior independent director
Mike Ford (from 24/11/2020)	Non-executive director
Angela Monaghan	Chair of the Trust
Tim Breedon	Director of nursing and quality / Deputy chief executive
Salma Yasmeen	Director of strategy (lead executive director)

All members of the Committee are required to undertake suitable training in order to discharge their duties as members of the Committee.

The Charitable Funds Committee is supported by the EyUp! Operational Management Group and the Linked Charities Group, both of which report to the Committee.

The day to day operations of the charitable funds are administered by South West Yorkshire Partnership NHS Foundation Trust.

# REFERENCE AND ADMINISTRATIVE DETAILS

**EyUp!** is registered under the single registered number 1055931.

The governing document is a deed dated 1st April 1996.

**The MHM** is a linked charity registered under number 1055931-12. Its objectives are for any charitable purposes relating to the South West Yorkshire Partnership NHS Foundation Trust or relating to the health service by advancing the education of the public on the subject of mental health.

**Creative Minds** is a linked charity registered under number 1055931-13. Its objectives are for any charitable purposes relating to the South West Yorkshire Partnership NHS Foundation Trust or relating to the health service by relieving sickness and preserving health and wellbeing and by promoting social inclusion for the public benefit by preventing people from becoming socially excluded, relieving the needs of those people who are socially excluded, and assisting them to reintegrate into society.

**Spirit in Mind** is a linked charity registered under number 1055931-14. Its objectives are for any charitable purposes relating to the South West Yorkshire Partnership NHS Foundation Trust or relating to the health service by the promotion of racial harmony for the public benefit by advancing education and raising awareness of mental health issues relating to culture and religion, and advancing racial harmony through the provision of cross-cultural activities which enhance health and wellbeing.

## HOW TO CONTACT US

### **EyUp!**

Fieldhead  
Ouchthorpe Lane  
Wakefield  
WF1 3SP

### **EXTERNAL EXAMINER:**

Deloitte LLP  
One City Square  
Leeds  
LS1 2AL

### **BANKERS:**

National Westminster Bank  
3 Ropergate  
Pontefract  
West Yorkshire  
WF8 1LH

### **INTERNAL AUDITOR:**

360 Assurance  
Riverside House  
Bridge Park Road  
Thurmaston  
Leicester  
LE4 8BL



# A BIG THANK YOU



On behalf of the staff and service users who have benefitted from improved services due to donations and legacies, the Corporate Trustee would like to thank all service users, relatives, carers, members, the general public and staff who have made charitable donations, participated in the lottery, and supported the work of the charities.



## SUPPORT THE WORK OF EyUp!



THANK YOU FOR READING ABOUT THE PROJECTS THAT THE CHARITY HAS SUPPORTED THIS YEAR, THIS CANNOT CONTINUE WITHOUT ONGOING DONATIONS.

### WHAT COULD YOUR GIFT BUY?

£1	COULD BUY	COLOURING PENS FOR AN ART SESSION
£10	COULD BUY	A DVD FOR A WARD
£20	COULD BUY	SEEDS AND PLANTS FOR A GARDENING GROUP
£30	COULD BUY	BOOKS TO START A WARD LIBRARY
£50	COULD BUY	ARTS AND CRAFTS MATERIALS
£100	COULD BUY	A WATER FEATURE FOR A SENSORY GARDEN
£150	COULD BUY	A DAY TRIP FOR SERVICE USERS
£300	COULD BUY	A PORTABLE PIANO FOR A WARD
£500	COULD BUY	START-UP COSTS FOR A NEW ACTIVITY GROUP

If you would like to make a donation:

#### Through your bank:

Pay direct to the charity donation account, 54-30-64, account code 42591511

#### By Just Giving:

Donate online at [www.justgiving.com/EyUp](http://www.justgiving.com/EyUp)

#### By Cheque:

Please make cheques payable to "EyUp!" and send to EyUp!, South West Yorkshire Partnership NHS FT, Fieldhead Hospital, Block 9, Ouchthorpe, Wakefield, WF13SP.

Signed:

A handwritten signature in black ink.

Name: Angela Monaghan

Date: 28th September 2021

## ***STATEMENT OF TRUSTEE RESPONSIBILITIES IN RESPECT OF THE TRUSTEE ANNUAL REPORT AND ACCOUNTS***

Under charity law, the Trustee are responsible for preparing the Trustee annual report and accounts for each financial year, which show a true and fair view of the state of affairs of the Charity and of the excess of expenditure over income for that period.

In preparing these financial statements, generally accepted accounting practice entails that the Trustee:

- Select suitable accounting policies and then apply them consistently
- Make judgements and estimates that are reasonable and prudent
- State whether the recommendations of the Statement of Recommended Practice have been followed, subject to any material departures disclosed and explained in the financial statements
- State whether the financial statements comply with the Trust Deed, subject to any material departures disclosed and explained in the financial statements
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue its activities

The Trustee is required to act in accordance with the Trust Deed and the rules of the Charity, within the framework of trust law. The Trustee are responsible for keeping proper accounting records, sufficient to disclose at any time, with reasonable accuracy, the financial position of the Charity at that time, and to enable the Trustee to ensure that, where any statements of accounts are prepared by the Trustee under section 132(1) of the Charities Act 2011, those statements of accounts comply with the requirements of regulations under that provision. The Trustee have general responsibility for taking such steps as are reasonably open to the trustee to safeguard the assets of the Charity and to prevent and detect fraud and other irregularities.

**Signed on behalf of the trustee:**

Signed:  \_\_\_\_\_

Name: Angela Monaghan

Date: 28th September 2021



Taylor's of Harrogate kindly donated Yorkshire Tea parcels to EyUp! to distribute to the Trust Covid Vaccination Centres to help keep staff hydrated

# ***INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEE OF EyUp!***

I report to the trustees on my examination of the accounts of EyUp! ("the Trust") for the year ended 31 March 2021 which comprise the income and expenditure account, the balance sheet and the related notes 1 to 21.

This report is made solely to the charity's trustees, as a body, in accordance with section 145 of the Charities Act 2011 and regulations made under section 154 of that Act. My work has been undertaken so that I might state to the charity's trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body, for my work, for this report, or for the opinions I have formed.

## ***RESPONSIBILITIES AND BASIS OF REPORT***

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the 2011 Act"). You are satisfied that your charity is not required by charity law to be audited and have chosen instead to have an independent examination.

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

## ***INDEPENDENT EXAMINER'S STATEMENT***

Since the charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of Institute of Chartered Accountants in England & Wales, which is one of the listed bodies.



I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the 2011 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

**Sarah Anderson FCCA**  
**for and on behalf of Deloitte LLP**  
**Leeds, United Kingdom**



# **EYUP! AND LINKED CHARITIES STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDING 31 MARCH 2021**

		2021			2020		
	Note	Unre- stricted funds	Re- stricted funds	Total Funds 2021	Unre- stricted funds	Re- stricted funds	Total Funds 2020
		£000	£000	£000	£000	£000	£000
<b>Income from:</b>							
Donations and legacies	4	27	271	298	27	383	410
Charitable activities	4	0	533	533	0	30	30
Other trading activities	5	40	0	40	50	0	50
Investments	7	0	1	1	1	1	2
<b>Total income</b>		<b>67</b>	<b>805</b>	<b>872</b>	<b>78</b>	<b>414</b>	<b>492</b>
<b>Expenditure on:</b>							
Raising funds	8	(42)	0	(42)	(46)	0	(46)
Charitable activities							
Service user education and welfare	9	(25)	(493)	(523)	(26)	(380)	(406)
<b>Total expenditure</b>		<b>(67)</b>	<b>(498)</b>	<b>(565)</b>	<b>(72)</b>	<b>(380)</b>	<b>(452)</b>
<b>Net income / (expenditure)</b>		<b>0</b>	<b>307</b>	<b>307</b>	<b>6</b>	<b>34</b>	<b>40</b>
Transfers between funds	20	0	0	0	0	0	0
<b>Net movement in funds</b>		<b>0</b>	<b>307</b>	<b>307</b>	<b>6</b>	<b>34</b>	<b>40</b>
<b>Reconciliation of funds</b>							
Total funds brought forward		200	359	559	194	325	519
<b>Total funds carried forward</b>		<b>200</b>	<b>666</b>	<b>866</b>	<b>200</b>	<b>359</b>	<b>559</b>

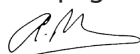
Restricted funds incorporate the linked charities and within EyUp!, the funds held from NHS Charities Together and NHS Wakefield CCG.



# **EYUP! AND LINKED CHARITIES BALANCE SHEET** **AS AT 31 MARCH 2021**

Balance sheet	Note	Unre- stricted funds	Re- stricted funds	Total Funds 2021	Unre- stricted funds	Re- stricted funds	Total Funds 2020
		£000	£000	£000	£000	£000	£000
<i>Current assets</i>							
Debtors	16	2	55	57	0	0	0
Cash and cash equivalents	17	202	639	841	203	401	604
<b>Total current assets</b>		<b>204</b>	<b>694</b>	<b>898</b>	<b>203</b>	<b>401</b>	<b>604</b>
<i>Liabilities</i>							
Creditors falling due within one year	18	(4)	(5)	(9)	(3)	(0)	(3)
Accruals	18	0	(23)	(23)	0	(42)	(42)
<b>Net current as- sets (liabilities)</b>		<b>200</b>	<b>666</b>	<b>866</b>	<b>200</b>	<b>359</b>	<b>559</b>
<b>Total net assets or liabilities</b>		<b>200</b>	<b>666</b>	<b>866</b>	<b>200</b>	<b>359</b>	<b>559</b>
<i>The funds of the charity:</i>							
Restricted in- come funds		0	666	666	0	359	359
Unrestricted income funds		200	0	200	200	0	200
<b>Total charity funds</b>		<b>200</b>	<b>666</b>	<b>866</b>	<b>200</b>	<b>359</b>	<b>559</b>

The notes at pages 34 to 55 form part of these accounts

Signed: 

Name: Angela Monaghan

Date: 28th September 2021

## EYUP! AND LINKED CHARITIES STATEMENT OF CASH FLOWS FOR THE YEAR ENDING 31 MARCH 2020

Statement of cash flows	Note	Total funds	Total funds
		2020/21	2019/20
<i>Cash flows from operating activities</i>			
Net cash provided by (used in) operating activities	19	236	54
<i>Cash flows from investing activities</i>			
Interest received	7	1	2
Net cash provided by (used in) investing activities		1	2
Change in cash and cash equivalents in the reporting period		237	56
Cash and cash equivalents at the beginning of the reporting period		604	548
Cash and cash equivalents at the end of the reporting period		<b>841</b>	<b>604</b>

## NOTES ON THE ACCOUNTS

### 1. Accounting policies

#### (a) Basis of preparation

The financial statements have been prepared under the historic cost convention, with the exception of investments which are included at fair value. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) and the Charities Act 2011.

The Trustee have a reasonable expectation that EyUp! and its linked charities have sufficient resources to continue in operational existence for the foreseeable future. For this reason they continue to adopt the going concern basis in preparing the accounts. In making this assertion the Trustee has taken several considerations into account, budgets for 2021/22 have been approved by the Trustee which demonstrate that each one has funding streams and expenditure plans in place.



## **(b) Funds structure**

Where there is a legal restriction on the purpose to which a fund may be put, the fund is classified either as:

- A restricted fund; or
- An endowment fund

Restricted funds are those where the donor had provided for the donation to be spent in furtherance of a specified charitable purpose.

Endowment funds arise when the donor has expressly provided that the gift is to be invested and only the income of the fund may be spent. EyUp! and the linked charities currently have no endowment funds.

Those funds which are neither endowment nor restricted income funds, are unrestricted income funds which are sub analysed between designated (earmarked) funds where the trustee have set aside amounts to be used for specific purposes or which reflect the non-binding wishes of donors and unrestricted funds which are at the trustee discretion, including the general funds which represent the Charities reserves. The major funds held in each of these categories are disclosed in note 21.

## **(c) Income**

All income is recognised once the charity has entitlement to the resources. It is probable (more likely than not) that the resources will be received and the monetary value of incoming resources can be measured with sufficient reliability.

When there are terms or conditions attached to income, particularly grants, these terms or conditions must be before the income is recognised as the entitlement condition will not be met until that point. Where the terms or conditions have not met or uncertainty exists as to whether they can be met then the relevant income is not recognised in the year but deferred and shown on the balance sheet as deferred income.

## **(d) Income from legacies**

Legacies are accounted for as income either upon receipt or where the receipt of the legacy is probable.

Receipt is probable when:

- Confirmation has been received from the representatives of the estate(s) that probate has been granted;
- The executors have established that there are sufficient assets in the estate to pay the legacy; and
- All conditions attached to the legacy have been fulfilled or are within the charity's control.

If there is uncertainty as to the amount of the legacy and it cannot be reliably estimated then the legacy is shown as a contingent asset until all of the conditions for income recognition are met.

### **(e) Expenditure and irrecoverable VAT**

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to each category of expense shown in the Statement of Financial Activities. Expenditure is recognised when the following criteria are met:

- There is a present legal or constructive obligation resulting from a past event;
- It is more likely than not that a transfer of benefits (usually a cash payment) will be required in settlement; and
- The amount of the obligation can be measured or estimated reliably

Irrecoverable VAT is charged against the category of resources expended for which it was incurred.

### **(f) Recognition of expenditure and associated liabilities as a result of grant**

Grants payable are payments made to third parties in the furtherance of the charitable objects of the Fund.

Grant payments are recognised as expenditure when the conditions for their payment have been met or where there is a constructive obligation to make a payment.

A constructive obligation arises when:

- We have communicated our intention to award a grant to a recipient who then has a reasonable expectation that they will receive a grant;
- We have made a public announcement about a commitment which is specific enough for the recipient to have a reasonable expectation that they will receive a grant; and
- There is an established pattern of practice which indicates to the recipient that we will honour our commitment

The trustee has control over the amount and timing of grant payments and





consequently where approval has been given by the trustee and any of the above criteria have been met then a liability is recognised. Grants are not usually awarded with conditions attached. However, when they are then those conditions have to be met before the liability is disclosed.

Where an intention has not been communicated, then no expenditure is recognised but an appropriate designation is made in the appropriate fund. If a grant has been offered but there is uncertainty as to whether it will be accepted or whether conditions will be met then no liability is recognised but a contingent liability is disclosed.

### **(g) Allocation of support costs**

Support costs are those costs which do not relate to a single activity. These include some staff costs, costs of administration, internal and external examiner costs. Support costs have been apportioned to charitable activities on an appropriate basis. The analysis of support costs and the bases of apportionment applied are shown in note 12.

### **(h) Fundraising costs**

The costs of raising funds are those costs attributable to raising income for the charity, other than those costs incurred in undertaking charitable activities or the costs incurred in undertaking trading activities in furtherance of the Charity's objects. The costs of raising funds include the prizes paid out in respect of the lottery.

### **(i) Charitable activities**

Costs of charitable activities comprise all costs incurred in the pursuit of the charitable objects of the charity. These costs, where not wholly attributable, are apportioned between the categories of charitable expenditure in addition to the direct costs. The total costs of each category of charitable expenditure include an apportionment of support costs as shown in note 12.

### **(j) Debtors**

Debtors are amounts owed to the charity. They are measured on the basis of their recoverable amount.

### **(k) Cash and cash equivalents**

Cash at bank and in hand is held to meet the day to day running costs of the charity as they fall due. Cash equivalents are short term, liquid investments.

## **(l) Creditors**

Creditors are amounts owed by the charity. They are measured at the amount that the charity expects to have to pay to settle the debt.

Amounts which are owed in more than a year are shown as long term creditors.

## **(m) Pensions**

EyUp! does not directly employ staff, staff working on the charity are directly employed by South West Yorkshire Partnership NHS FT, with the full costs recharged to EyUp! As employees of the Trust they are entitled to join the NHS Pensions Scheme.

The 2015 NHS Pension Scheme, effective 1 April 2015, is a 'Career Average Revalued Earnings' ("CARE") scheme. From the above date, annual pensions are normally based on 1/54th of a members CARE for each year of service. CARE is defined as a member's average earnings in a financial year, and is uplifted annually by a percentage determined by the Treasury. Members who are practitioners as defined by the Scheme Regulations are subject to exactly the same arrangements as all members who are directly employed by the NHS, with effect from the above date.

The 1995/1998 is a "final salary" scheme. Annual pensions are normally based on 1/80th for the 1995 section and of the best of the last 3 years pensionable pay for each year of service, and 1/60th for the 2008 section of reckonable pay per year of membership. With effect from 1 April 2008 members can choose to give up some of their annual pension for an additional tax free lump sum, up to a maximum amount permitted under HMRC rules. Annual increases are applied to pension payments at rates defined by the Pensions (Increase) Act 1971, and are based on changes in consumer prices in the twelve months ending 30 September in the previous calendar year. On death, a pension of 50% of the member's pension is normally payable to the surviving spouse.

The Scheme is subject to a full actuarial valuation every four years, and an IAS 19 accounting valuation every year. The results form the latest valuation as at 31 March 2016 set the employer contribution rate at 20.6% of pensionable pay.

The valuation of scheme liability in accordance with IAS19 is carried out annually by the Scheme Actuary. The latest assessment of the liabilities of the Scheme is contained in the Scheme Actuary report, which forms part of the annual NHS Pension Scheme (England and Wales) Resource Account, published annually. These accounts can be viewed on the NHS Pensions website.

The NHS Pension Scheme has 2 schemes, both are an unfunded, defined benefit scheme that covers NHS employers, General Practices and other bodies, allowed under the direction of the Secretary of State in England and Wales. Each scheme is not designed



to be run in a way that would enable participating bodies to identify their share of the underlying Scheme assets and liabilities. Therefore, each Scheme is accounted for as if it were a defined contribution scheme: the cost to the charity of participating in the Scheme is taken as equal to the contributions payable to the Scheme for the accounting period.

## 2. Prior year comparatives by type of fund

The primary statements provide prior year comparatives in total; this note provides prior period comparatives for the statement of financial activities and the balance sheet for each of the funds included in the notes to the accounts. (pages 31 to 32).

Betty & Sean, members of Team Generation Game took part in the EyUp! Yorkshire Charity Challenge event cycling 103km each helping to raise £506.25



**EyUp! UNRESTRICTED FUNDS - STATEMENT OF FINANCIAL  
ACTIVITY FOR THE YEAR ENDED 31 MARCH 2021**

	2021	2020
	£'000	£'000
<b>Income and endowments from:</b>		
Donations and legacies	27	27
Other trading activities	40	50
Investments	0	1
<b>Total income resources</b>	<b>67</b>	<b>78</b>
<b>Expenditure on:</b>		
Raising funds	(42)	(46)
Charitable activities	(25)	(26)
<b>Total expenditure</b>	<b>(67)</b>	<b>(72)</b>
<b>Net income / (expenditure)</b>	<b>0</b>	<b>6</b>
Transfers between funds	0	0
<b>Net movement in funds</b>	<b>0</b>	<b>6</b>
<b>Reconciliation of funds</b>		
Total funds brought forward	200	194
<b>Total funds carried forward</b>	<b>200</b>	<b>200</b>



**EyUp! UNRESTRICTED FUNDS - BALANCE SHEET AS AT 31 MARCH 2021**

	2021	2020
	£'000	£'000
<i>Current assets</i>		
Debtors	2	0
Cash and cash equivalents	202	203
<b>Total current assets</b>	<b>204</b>	<b>203</b>
<i>Liabilities</i>		
Creditors falling due within one year	(4)	(3)
<b>Net current assets (liabilities)</b>	<b>200</b>	<b>200</b>
<b>Total assets less current liabilities</b>	<b>200</b>	<b>200</b>
<b>Total net assets or liabilities for unrestricted funds</b>	<b>200</b>	<b>200</b>
<b>Total unrestricted funds</b>	<b>200</b>	<b>200</b>



**RESTRICTED FUNDS - STATEMENT OF FINANCIAL ACTIVITY FOR THE YEAR ENDED 31 MARCH 2021**

	2021 EyUp!	2021 MHM	2021 Cre- ative Minds	2021 Spirit in Mind	2021 Total	2020 MHM	2020 Cre- ative Minds	2020 Spirit in Mind	2020 Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>Income from:</b>									
Donations and legacies	45	41	176	9	271	41	329	13	383
Charitable activities	227	20	283	3	533	24	6	0	30
Investments	0	0	1	0	1	0	1	0	1
<b>Total in- come</b>	<b>272</b>	<b>61</b>	<b>460</b>	<b>12</b>	<b>805</b>	<b>65</b>	<b>336</b>	<b>13</b>	<b>414</b>
<b>Expenditure on:</b>									
Charitable activities	(128)	(64)	(296)	(10)	(498)	(64)	(301)	(15)	(380)
<b>Total ex- penditure</b>	<b>(128)</b>	<b>(64)</b>	<b>(296)</b>	<b>(10)</b>	<b>(498)</b>	<b>(64)</b>	<b>(301)</b>	<b>(15)</b>	<b>(380)</b>
<b>Net income / (expendi- ture)</b>	<b>144</b>	<b>(3)</b>	<b>164</b>	<b>2</b>	<b>307</b>	<b>1</b>	<b>35</b>	<b>(2)</b>	<b>34</b>
Transfers between funds		0	0	0	0	0	0	0	0
<b>Net move- ment in funds</b>	<b>144</b>	<b>(3)</b>	<b>164</b>	<b>2</b>	<b>307</b>	<b>1</b>	<b>35</b>	<b>(2)</b>	<b>34</b>
<b>Reconciliation of funds</b>									
Total funds brought forward	0	35	323	1	359	35	287	3	325
<b>Total funds carried forward</b>	<b>144</b>	<b>32</b>	<b>487</b>	<b>3</b>	<b>666</b>	<b>36</b>	<b>322</b>	<b>1</b>	<b>359</b>

EyUp! had no restricted funds in 2019/20.



## RESTRICTED FUNDS - BALANCE SHEET AS AT 31 MARCH 2021

	2021 EyUp!	2021 MHM	2021 Cre- ative Minds	2021 Spirit in Mind	2021 Total		2020 MHM	2020 Cre- ative Minds	2020 Spirit in Mind	2020 Total
	£'000	£'000	£'000	£'000	£'000		£'000	£'000	£'000	£'000
Current assets										
Cash and cash equivalents	149	32	510	3	694		35	365	1	401
<b>Total current assets</b>	<b>149</b>	<b>32</b>	<b>510</b>	<b>3</b>	<b>694</b>		<b>35</b>	<b>365</b>	<b>1</b>	<b>401</b>
Liabilities										
Creditors falling due within one year	(5)	0	0	0	(5)		0	(0)	0	(0)
Accruals	0	0	(23)	0	(23)		0	(42)	0	(42)
<b>Net current assets (liabilities)</b>	<b>144</b>	<b>32</b>	<b>487</b>	<b>3</b>	<b>666</b>		<b>35</b>	<b>323</b>	<b>1</b>	<b>359</b>
<b>Total assets less current liabilities</b>	<b>144</b>	<b>32</b>	<b>487</b>	<b>3</b>	<b>666</b>		<b>35</b>	<b>323</b>	<b>1</b>	<b>359</b>
<b>Total net assets or liabilities for restricted funds</b>	<b>144</b>	<b>32</b>	<b>487</b>	<b>3</b>	<b>666</b>		<b>35</b>	<b>323</b>	<b>1</b>	<b>359</b>
<b>Total restricted funds</b>	<b>144</b>	<b>32</b>	<b>487</b>	<b>3</b>	<b>666</b>		<b>35</b>	<b>323</b>	<b>1</b>	<b>359</b>

EyUp! had no restricted funds in 2019/20.

### 3. Related party transactions

EyUp! has made payments to the Trust in relation to administration costs; these are made on an arm's length basis.

	Total 2021	Total 2020
	£'000	£'000
South West Yorkshire Partnership NHS Foundation Trust	226	276
	<b>226</b>	<b>276</b>

There was £55k closing balance in debtors (£ nil 2019/20) and £8k (2k 2020/21) in creditors in respect of the Trust.

### 4. Income from donations and legacies and charitable activities

	2021			2020		
	Unrestrict- ed funds	Restricted funds	Total 2021	Unrestrict- ed funds	Restricted funds	Total 2020
	£'000	£'000	£'000	£'000	£'000	£'000
Donations from individuals	23	53	76	23	1	24
Corporate donations	4	218	222	4	382	386
Legacies	0	0	0	0	0	0
Grants	0	533	533	0	31	31
<b>Total</b>	<b>27</b>	<b>804</b>	<b>831</b>	<b>27</b>	<b>414</b>	<b>441</b>

#### Analysis of Restricted Funds

	2021	2021	2021	2021	2020	2020	2020
	EyUp!	Creative minds	MHM	Spirit in Mind	Creative minds	MHM	Spirit in Mind
	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Donations from individuals	45	4	3	1	0	1	0
Corporate donations	0	172	38	8	329	41	12
Legacies	0	0	0	0	0	0	0
Grants	227	283	20	3	25	6	0
<b>Total</b>	<b>272</b>	<b>459</b>	<b>61</b>	<b>12</b>	<b>354</b>	<b>48</b>	<b>12</b>

EyUp! had no restricted funds in 2019/20.



Donations from individuals are gifts from members of the public, relatives, carers, service users and staff.

## 5. Analysis of income from other trading activities

	Unre- stricted funds	Re- stricted funds	Total 2021	Unre- stricted funds	Re- stricted funds	Total 2020
	£'000	£'000	£'000	£'000	£'000	£'000
Lottery	34	0	34	36	0	36
Sale of goods	3	0	3	4	0	4
Fundraising events	3	0	3	10	0	10
<b>Total</b>	<b>40</b>	<b>0</b>	<b>40</b>	<b>50</b>	<b>0</b>	<b>50</b>

## 6. Role of volunteers

One volunteer is in attendance of the Charitable Funds Committee.

The Mental Health Museum has one volunteer who performs a variety of tasks within the Museum.

Creative Minds have a number of volunteers who sit on the locality collectives which make decisions on small grant funding.

In accordance with the SORP, due to the absence of any reliable measurement basis, the contribution of these volunteers is not recognised in the accounts.

## 7. Gross investment income

	Unre- stricted funds	Re- stricted funds	Total 2021	Unre- stricted funds	Re- stricted funds	Total 2020
	£'000	£'000	£'000	£'000	£'000	£'000
Short term invest- ments and deposits cash on deposit	0	1	1	1	1	2
<b>Total</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>2</b>

The income shown for restricted funds is in relation to Creative Minds.

## 8. Analysis on expenditure on raising funds

	Unre- stricted funds	Re- stricted funds	Total 2021	Unre- stricted funds	Re- stricted funds	Total 2020
	£'000	£'000	£'000	£'000	£'000	£'000
Lottery prizes	17	0	17	18	0	18
Lottery admin fee	0	0	0	0	0	0
fundraising costs	25	0	25	29	0	29
<b>Total</b>	<b>42</b>	<b>0</b>	<b>42</b>	<b>47</b>	<b>0</b>	<b>47</b>

## 9. Analysis of charitable expenditure

EyUp! did not undertake any direct charitable activities on its own account during the year. All of the charitable expenditure was in the form of grant funding.

Grants were approved in favour of the partner organisations, principally the South West Yorkshire Partnership NHS Foundation Trust to carry out activities that will benefit the service users of the NHS. EyUp! incurred expenditure with third parties in pursuance of those grants or reimbursed expenditure incurred by them.

Creative Minds expenditure was in the form of grant funding and on staff who carry out direct charitable activity, details of the significant grants are found in note 10.

Mental Health Museum and Spirit in Mind undertake direct charitable activities and do not make grants.





	Activ- ities direct	Grant funded activity	Sup- port costs	Total 2021	Activ- ities direct	Grant funded activity	Sup- port costs	Total 2020
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
EyUp! activities	0	153	0	153	0	26	0	26
Creative Minds activities	217	76	3	295	185	112	4	301
Mental Health Museum activities	64	0	0	64	64	0	0	64
Spirit in Mind activities	10	0	0	10	15	0	0	15
	291	229	3	523	264	138	4	406

## 10. Analysis of grants

The charity does not make grants to individuals. All grants are made to the Trust or other third party organisations.

Creative Minds significant grants 2020/21	£	No.
Qdos Creates	10,225	4
Creative Recovery	7,950	2
Reds in the Community	6,000	2
Butterflies Dementia Support	4,650	2
The Civic Barnsley	3,500	1
S2R (Support to Recovery)	3,000	1
Awakening Arts	3,000	1
Halifax Opportunities Trust	3,000	1
Handmade Parade	3,000	1
Globe Arts Studio	2,940	1
The Artworks	2,938	1
Incredible Edible	2,813	1
Theatre Royal Wakefield	2,750	1
Dream Time Creative	2,700	1
Luv2meetU	2,242	1

Creative Minds significant grants 2019/20	£	No.
People's Voice Media	11,000	3
Creative Recovery	9,800	1
Butterflies Dementia Support	8,800	1
Qdos Creates Ltd	8,770	4
The Artworks	6,605	2
CoActive Arts	4,920	1
The Hepworth, Wakefield	4,520	1
Globe Arts Studio	3,249	1
Barnsley Football Club	3,238	1
Growing Works	3,000	1
The Art House	3,000	1
Wakefield MDC	2,650	1
S2R (Support to Recovery)	2,500	1
Community Recovery	2,400	1
Incredible Edible	2,000	1
Holme Valley Sharing Memories	2,000	1

## 11. Movements in grant funding commitments accrued

Creative Minds	Current liabilities	Non current liabilities	Total	Current liabilities	Non current liabilities	Total
	2021	2021	2021	2020	2020	2020
	£'000	£'000	£'000	£'000	£'000	£'000
<b>Opening balance at 1 April</b>	<b>42</b>	<b>0</b>	<b>42</b>	<b>27</b>	<b>0</b>	<b>27</b>
Additional commitments made during the year	56	0	56	92	0	92
Movement from current to non-current	0	0	0	0	0	0
Amounts paid during the year	(75)	0	(75)	(77)	0	(77)
<b>Closing balance at 1 April</b>	<b>23</b>	<b>0</b>	<b>23</b>	<b>42</b>	<b>0</b>	<b>42</b>

The grants included are grants made by Creative Minds to external third parties where the award has been communicated.

As described in notes 9 and 10, the charity awarded a number of grants in the year. Many grants were awarded and paid out in the same financial year. However, some grants are multiyear grants paid over a longer period.

As the charity has control over the award and timing of grants there is little uncertainty around these payments.

## 12. Allocation of support costs and overheads

Support and overhead costs are allocated to charitable activities on a pro rata basis between funds. Support costs are the costs associated with the administration of the Charity. These amounts are paid directly to South West Yorkshire Partnership NHS Foundation Trust. Salaries and related costs include the costs of the staff working in the linked charities and are allocated to each individual restricted fund and the fundraiser who is allocated to unrestricted funds.



The basis of allocation used are as follows:

- Balance: Each month the charge is allocated on a pro-rata basis on the balance of each fund.
- Direct: The salaries are charged direct to each restricted fund that the post holder works for.

Charitable activities	Unre-stricted funds	Re-stricted funds	2021 Total	Unre-stricted funds	Re-stricted funds	2020 Total
	£'000	£'000	£'000	£'000	£'000	£'000
External examination	0	1	1	0	1	1
Financial administration	0	0	0	0	0	0
Miscellaneous	0	0	0	0	1	1
Salaries and related costs	40	290	330	23	252	275
<b>Total</b>	<b>40</b>	<b>291</b>	<b>331</b>	<b>23</b>	<b>254</b>	<b>277</b>

	2021 Total	2020 Total
	£'000	£'000
EyUp!	40	23
Creative Minds	218	187
Mental Health Museum	64	55
Spirit in Mind	9	12
	<b>331</b>	<b>277</b>

### 13. Trustee remuneration, benefits and expenses

The Corporate Trustee give their time freely and receive no remuneration or reimbursement of expenses for the work that they undertake as trustee.

### 14. Analysis of staff costs and remuneration of key management personnel

No members of staff are employed directly by the charities, employees are employed by South West Yorkshire Partnership NHS FT and their costs recharged

	2021	2020
	£'000	£'000
Salaries and wages	277	225
Social security costs	23	20
Employers' pension contribution	30	30
	330	275

	2021	2020
	£'000	£'000
EyUp!	40	23
Creative Minds	217	185
Mental Health Museum	64	55
Spirit in Mind	9	12
	330	275

The average number of full time equivalent employees during the year was 9 (2020: 8) EyUp!, 1 (2020: 1); Creative Minds 5 (2020: 5); Mental Health Museum 2 (2020: 2); Spirit in Mind 1 (2020:1))

One employee within Creative Minds had emoluments in excess of £60,000 (2020: 1)



## 15. Independent Examiner's remuneration

The independent examiners remuneration of £994 (2020 £994) related solely to the independent examination with no additional work being undertaken (2020: nil).

## 16. Analysis of current debtors

There are nil debtors in 2020/21 and in 2019/20.

## 17. Analysis of cash and cash equivalents

	2021	2020
	£'000	£'000
Cash in hand	78	11
Notice deposits (less than 3 months)	763	592
<b>Total cash and cash equivalents</b>	<b>841</b>	<b>604</b>

No cash or cash equivalents or current asset investments were held in non-cash investments or outside of the UK.

All of the amounts held on interest bearing deposit are available to spend on charitable activities.

## 18. Analysis of liabilities

	2021	2020
	£'000	£'000
<b>Creditors under 1 year</b>		
Trade creditors	(9)	(3)
Accruals for grants	(23)	(42)
<b>Total</b>	<b>(32)</b>	<b>(45)</b>

There are no liabilities greater than one year in 2020/21 (nil 2019/20)

## 19.Reconciliation of net income / (expenditure) to net cash flow from operating activities

	2021	2020
	£'000	£'000
Net income / (expenditure) for the reporting period(as per the statement of financial activities)	307	40
<b>Adjustments for:</b>		
Dividends, interest and rents from investments	(1)	(2)
(Increase)/decrease in debtors	(57)	0
Increase/(decrease) in creditors	(13)	16
<b>Net cash provided by (used in) operating activities</b>	<b>236</b>	<b>54</b>

## 20.Transfers between funds

There has been no transfer between funds in year. (2019/20: nil).

## 21.Analysis of charitable funds

### (a) Analysis of Restricted fund movements

	Balance b/fwd	Income	Expenditure	Transfers	Fund fwd
	£'000	£'000	£'000	£'000	£'000
EyUp!	0	272	(128)	0	144
Mental Health Museum	35	61	(64)	0	32
Creative Minds	223	460	(296)	0	487
Spirit in Mind	1	12	(10)	0	3
<b>Total</b>	<b>359</b>	<b>805</b>	<b>(498)</b>	<b>0</b>	<b>666</b>

The objects of each of the restricted funds are as follows

**EyUp!** has 2 restricted funds, both new in 2020/21, one relates to the grants from NHS Charities Together, these grants are specifically in response to the COVID-19 pandemic. The other restricted fund relates to NHS Wakefield CCG, this fund is for donations to NHS Wakefield CCG but the activity benefits the service users of South West Yorkshire Partnership NHS FT.





## (b) Analysis of unrestricted and material designated fund movements

	Balance b/fwd	Income	Expendi- ture	Transfers	Fund c/fwd
	£'000	£'000	£'000	£'000	£'000
Other designated funds	116	14	(11)	0	119
General funds	84	53	(56)	0	81
<b>Total</b>	<b>200</b>	<b>67</b>	<b>(67)</b>	<b>0</b>	<b>200</b>

The Trustee set an opening or closing balance of £50,000 or above as the threshold for the separate reporting of material designated (earmarked funds). In the interests of accountability and transparency a complete breakdown of all such funds is available upon written request.

The objects of each of the designated unrestricted funds are as follows:

Other designated funds relate to benefiting service users on wards and Trust services within South West Yorkshire Partnership NHS Foundation Trust for which donors have indicated their non-binding wishes when making their generous gifts.

The general funds include all donations for which a donor has not expressed any preference as to how the funds shall be spent and the unrestricted income accruing to the charity. These funds are applied for any charitable purpose to the benefit of the service users of South West Yorkshire Partnership NHS Foundation Trust at the absolute discretion of the trustee.

