



# Trustees' Annual Report for the period

Period start date  
 From Day 01 Month March Year 2022 To Day 28 Month February Year 2023

## Section A Reference and administration details

Charity name SAGE Counselling

Other names charity is known by

Registered charity number (if any) 1088917

Charity's principal address 60 Stockbridge Road

Chichester

West Sussex

Postcode PO19 8QF

### Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Gina Howard	Chair		Management Committee
2	Mary Lou Harris	Counsellor		Management Committee
3	Robert Hambrook	Treasurer		Management Committee
4	Paul Gupta			Management Committee
5	Jane Oswin	Counsellor	From 9 <sup>th</sup> April 2022 onwards	Management Committee
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20				

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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

Type of adviser	Name	Address

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

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## Section B Structure, governance and management

### Description of the charity's trusts

Type of governing document	Constitution
How the charity is constituted	Association Model
Trustee selection methods	By appointment and endorsed at AGM

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Management committee and sub-committees. We have sub-committees for overseeing our Training Programme.

Member of British Association of Counselling and Psychotherapy (BACP), the governing body for counselling practices and organisations. SAGE Counselling abides by the ethical code of practice issued by the BACP.

Risk policy and indemnity insurance with Towergate Insurance up until January 2023. At that time, we switched insurer to Oxygen Insurance, now known as Marsh Commercial.

In the past, Sage Counselling received many clients through the social prescribing service set up by Crawley Community Action (CCA). During the last year, the funding for this initiative came to an end, but we continue as members of CCA and derive support from them on advertising and various areas of administration.

SAGE Counselling continues to work in partnership with the MNDA to offer counselling to selected clients suffering from Motor Neurone Disease and the clients' immediate families/ carers within the West Sussex area. Since December 2022, we have also been working with the East Sussex branch of the MNDA.

In addition to CCA, we are members of Voluntary Action Arun & Chichester (VAAC), Mid-Sussex Voluntary Action (MSVA) and Voluntary Sector Support, Horsham District Council. These are local authority funded agencies that help charities with all aspects of their functioning, from fund-raising to statutory responsibilities, and we use their platforms for advertising and to gain information about counselling in the local community

## Section C Objectives and activities

**Summary of the objects of the charity set out in its governing document**

To promote the mental well-being of those adults in our area who suffer from reduced mobility by the provision of a domiciliary counselling service. The organisation is based in Chichester and is available to residents of West Sussex.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

Counselling sessions with clients in their own homes. To ensure quality standards set by the BACP in the achievement of this objective, there is regular statutory supervision of all counsellors as well as training days on relevant topics such as Resilience, Personality Disorders, Bereavement, Making The Most Of Supervision. All Sage counsellors are expected to attend these training events, and they are also available to members of other agencies, and are therefore of benefit to a wider audience.

In the post-pandemic era, most counselling has taken place online, and this is particularly suitable for clients who live in areas of the county where we have no counsellors available for home visits. However, now that people have more confidence in going out, many clients have expressed a preference for counselling on a face-to-face basis, and in response to this, we now offer a service of hybrid counselling.

At the end of counselling, clients are offered the opportunity to supply written feedback on a printed form.

Sage Counselling is a fully professional home visiting counselling service delivered by volunteer counsellors for adults with limited mobility living in West Sussex who are unable to access other counselling services unaided. Mobility issues can arise from increasing age, medical conditions, end of life illness, disabilities and severe mental health issues such as anxiety and agoraphobia. Sage Counselling is unique in West Sussex and allows a specific marginalised client group to access counselling help.

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

We are not a grant-making organisation

We do not have sufficient reserves to develop an income stream from investments. We only run a simple savings account.

Contributions are accepted from clients when such contributions are offered as a mark of gratitude.

Counsellors undertake the counselling work as unpaid volunteers, although those counsellors who work on behalf of MNDA clients are paid a fixed rate by this agency. In addition, qualified counsellors are allowed to claim for mileage expenses and since June 2022, counsellors in training can also claim for mileage expenses, but at a lower rate than qualified counsellors.

## Section D

## Achievements and performance

**Summary of the main achievements of the charity during the year**

Our performance in terms of the number of counselling sessions offered, has unquestionably improved since Covid, but still remains some way off from the high level attained in some of the pre-Covid years. However, there was a general trend towards increasing monthly sessions, and that gives us cause to be optimistic about higher figures in the coming years

Although we continue to offer counselling by telephone and video link, there is evidence that clients are now more willing to ask for face-to-face counselling, and we believe that this will bring more clients to our organisation.

Positive feedback from clients

Our organisation offers placements for second year students of counselling and psychotherapy. This gives students the opportunity to develop their counselling skills in a safe environment under supervision.

We also offer placements to students in years 3 and 4 of their studies who are working toward a higher qualification such as a BA or MA. In addition, we work with qualified counsellors who are working towards accreditation to the BACP or other professional associations. A number of student counsellors have become fully qualified during their placement with SAGE Counselling.

We have continued to develop our virtual office system using the G-Suite platform. All Sage personnel are now comfortable with using this office for storage and retrieval of documents, as well as using this facility to disseminate information to others in our organisation.

## Section E

## Financial review

### Brief statement of the charity's policy on reserves

To avoid being in debt, any delving into reserves is seen as an amber warning of potential financial difficulties.

The Trustees aim to maintain sufficient reserves to meet six months operating expenses, estimated at a sum of £5000.

### Details of any funds materially in deficit

Nil

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

During the year, we received funding grants from both the National Lottery- Awards For All (£8,130) and Sussex Community Foundation (£6500).

Our organisation is also indebted to the efforts of Marian Stapley, a member of our Management Committee, who organised a fundraising walk which brought us a donation of almost £1000.

Expenditure is on supervision and mileage costs, promotional activities and administration.

No investments.

## Section F

## Other optional information

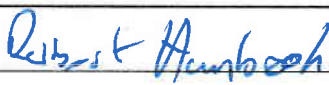
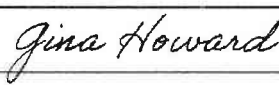
During the year, we undertook a radical overhaul of our promotional leaflet. Amongst other revisions, we changed some of the images and we updated the text to reflect how counselling is offered in a post-Covid society. As part of the review process, we decided to officially revert our organisation's name from SAGE Counselling to Sage Counselling, as the latter was considered to be far more practical. In the interim period, it is likely that both versions of our organisation's name will be apparent, (such as in this document).

## Section G

## Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	ROBERT JOHN HAMBROOK	Georgina Diane Howard
Position (e.g., Secretary, Chair, etc)	Treasurer and Trustee	Chair and Trustee
Date	5 <sup>th</sup> December 23	





CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name  
**SAGE Counselling**

1088917

**CC16a**

## Receipts and payments accounts

For the period from	01/03/2017 01/03/2022	To	28/02/2018 28/02/2023
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Client contributions	12,089			12,089	11,035
Training income	-			-	-
Prescription Plus Income	2,190			2,190	3,315
Interest received	5			5	-
Other income	-			-	24
MNDA Income	4,390			4,390	4,923
Private donations/Horsham Lottery	1,132			1,132	194
National Lottery Awards For All Grant	8,130			8,130	7,500
Sussex Community Foundation Grant	6,500			6,500	5,000
<b>Sub total (Gross income for AR)</b>	<b>34,436</b>	<b>-</b>	<b>-</b>	<b>34,436</b>	<b>31,991</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>34,436</b>	<b>-</b>	<b>-</b>	<b>34,436</b>	<b>31,991</b>
<b>A3 Payments</b>					
Counsellors' mileage payments	1,043	-	-	1,043	300
Website costs, including server rental	132	-	-	132	86
Memberships	445	-	-	445	419
Indemnity insurance	813	-	-	813	1,112
Printing	185	-	-	185	636
Prescription Plus costs	1,890	-	-	1,890	2,590
Supervision	8,280	-	-	8,280	10,029
Telephone and postage	180	-	-	180	315
Training	820	-	-	820	640
Administration	3,804	-	-	3,804	2,642
MNDA costs	4,265	-	-	4,265	4,310
Updating policies	-	-	-	-	-
DBS checks	19	-	-	19	201
Interviewing (prospective counsellors)	680	-	-	680	860
Intake Assessment	1,819	-	-	1,819	900
Independent Examination	408	-	-	408	384
Honoraria payments to Officers	1,500	-	-	1,500	1,500
<b>Sub total</b>	<b>26,283</b>	<b>-</b>	<b>-</b>	<b>26,283</b>	<b>26,924</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>26,283</b>	<b>-</b>	<b>-</b>	<b>26,283</b>	<b>26,924</b>
<b>Net of receipts/(payments)</b>	<b>8,153</b>	<b>-</b>	<b>-</b>	<b>8,153</b>	<b>5,067</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>20,959</b>	<b>-</b>	<b>-</b>	<b>20,959</b>	<b>15,892</b>
<b>Cash funds this year end</b>	<b>29,112</b>	<b>-</b>	<b>-</b>	<b>29,112</b>	<b>20,959</b>

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Current account	25,271	-	-
	Savings account	3,841	-	-
		-	-	-
	<b>Total cash funds</b>	<b>29,112</b>	<b>-</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>		Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	





Section A

Independent Examiner's Report

Report to the trustees/  
members of

Charity Name  
SAGE Counselling

On accounts for the year  
ended

28 February 2023

Charity no  
(if any)

1088917

Set out on pages

1-10

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **28/02/2023**.

Responsibilities and  
basis of report

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

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

Independent  
examiner's statement

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

*\* Please delete the words in the brackets if they do not apply.*

Signed:

Date:

13.12.23

Name:

Sarah Bestley

Relevant professional  
qualification(s) or body  
(if any):

ACA

Address:

Carter Nicholls Limited, Victoria House,  
Stanbridge Park, Staplefield Lane  
Staplefield, West Sussex RH17 6AS

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

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