



BEAM

(A company limited by guarantee)

**Report and financial statements for the year ended 31st March
2024.**

**Charity number: 1097322
Company Number: 4495170**

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The Management Committee presents its directors' report and audited financial statements for the year ended 31st March 2024.

Reference and administrative information

Charity Name	Beam Staffs
Charity registration number	1097322
Company registration number	4495170
Registered office and operational address	Unit No 1 The Mills Mill Street Stafford ST16 2QZ

Management Committee

Mr Roy Parker	Chair
Mr David Moreton	Vice Chair
Mr David Bailey	
Mr Simon Mountford	
Ms Latifa Gower	Joined September 23 as User
Representative	
Mrs Karin Hall	Joined September 23 as
Staff Representative	
Mrs Minnie Charlesworth	Joined September 23

Retiring Trustees

Mr Stephen Fletcher	Left September 23
Mrs Hayley Fletcher	Left September 23

Company Secretary

Mr Mike Howell

Staff Team

Mr Mike Howell	Chief Officer
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Benefits and Inclusion Support Service

Ms Nadina Binns	Senior Welfare Benefits
Advice Officer	
Ms Julieanne Roberts	Welfare Benefits Advisor
Mrs Karin Hall	Inclusivity Officer – From
August 23	

Building Better Opportunities and New Start 4 U

Mrs Karin Hall
Until July 23
Mrs Janine Davies
Wellbeing Officer and

Service Officer.
Mr Desmond Brumley
Wellbeing Officer

Employability Officer -

Mental Health and

Independent Living

Mental Health and

Financial Inspector

Mr Malcolm Kidd

Bankers

Unity Trust Bank
Nine Brindleyplace
Birmingham
B1 2HB

Accountant

Mrs Nadia Coupland

OBJECTS

The objects of the Society as set out in the memorandum of association are: -

1. The relief of people with a learning disability, in particular by the provision of help and support for them and for their families, dependants and carers, for the public benefit.
2. To provide or assist in the provision of facilities for the recreation or other leisure time occupation for people who have need thereof by reason of learning disability with the object of improving their condition of life.

“Learning disability” means any developmental disability of the mind and any associated condition howsoever caused and whether mild, moderate or severe.

In order to attain its objects but not for any other purpose the society may:-

3. Increase public awareness and understanding of the abilities of people with a learning disability, their problems and needs and those of their families, dependents and carers in order to assist their integration into society.

4. Encourage mutual help and co-operation between families, dependants and carers of people with learning disabilities (particularly within the geographical vicinity of the society) and also between them and other agencies and individual who work for them.
5. Co-operate with other charities, voluntary bodies and statutory authorities operating in furtherance of the objects of the Society or of similar charitable objects and exchange information and advice with them.
6. Raise funds and ask for and receive contributions (including subscriptions, legacies, grants and other gifts) provided that in raising funds the Society shall not undertake and permanent activities of a trading nature except those allowed by charity law.
7. Invest the money of the Society not immediately required for its purposes in or upon such investments, securities or properties as may be thought fit.
8. Employ such staff as are necessary for the proper pursuit of the objects upon such terms as to remuneration and otherwise as the Executive Committee shall decide provided that no paid member of staff shall be a member of the Executive Committee.
9. Appoint and constitute an advisory committee of people with a learning disability and such other advisory committees as the Executive Committee shall think fit.
10. Borrow or raise money in such manner and upon such terms as the Society shall think fit and may, for the purposes of securing any debt or other obligation of the Society, mortgage or charge all or part of the property of the Society.
11. Buy, take on lease or in exchange any building and/or land and maintain and equip such buildings and/or land for use and sell, lease or otherwise dispose of them subject to complying with such conditions and obtaining such consents as may be required by charity law
12. Undertake or accept any trusts or obligations.
13. Do all such other lawful things as shall further the attainment of the objects of the Society

Objectives

The objectives of the charity are to make sure that people with a learning disability living in Stafford and South Staffordshire have the same opportunity as everyone else to be a fully inclusive member of their community as they possibly can.

- We aim to reduce a person's potential for being marginalised and discriminated against because they have a disability.
- We aim to see our clients are fairly and equitably represented in areas of life and living that the non-disabled community will have a better chance of achieving in. For example, this could be employment, housing, personal health, benefits entitlement, social life and education.

Ensuring our work delivers its aims

We will consult with our users about the things we plan to do and the projects we plan to deliver. They will tell us what they think we need to do. Each project will have its own set of outcomes, outputs or results that are usually required for funding purposes. These activities are regularly reviewed by the Management Committee to ensure that our funded activities are consistent with our aims. Also, Trustees will consider our forward plans to ensure that the same tie up is present going forward as it does for past achievements, therefore ensuring that planned activities contribute to the agreed aims and objectives.

The focus of our work

The main objectives for the year continued to be those mentioned above. Beam has focussed itself on working in the following ways.

- In response to the Social Welfare legislation to ensure that our clients get the support they need in being able to respond to the changes to their benefits regime.
- For many complex reasons our clients are seriously underrepresented in being able to find employment. We have helped many people with learning disabilities get closer to the job market.
- Beam has, with the employability program, introduced a specific service for people who have a mental health issue they need support with.
- People with Learning Disabilities are considered to be the most lonely and isolated people in our communities. Beam has worked to reduce the unwanted consequences of those experiencing these situations.

- We have developed our Independent Living Service to encourage our clients to have a better quality of home life by developing their understanding of the things they can do to have a better home life.
- All beam staff have attended training courses on many different aspects of good practice in service delivery and how the job changes with the introduction of new legislation.
- We have, as much as possible, worked in partnership with likeminded organisations as a means of accessing the widest range of services that can be linked to the needs of our clients.

How our activities deliver public benefit

Our main activities and who we support are described below. All our charitable activities focus on the needs of people with learning disabilities and are undertaken to further our charitable purposes for the public benefit.

Our services, who used them and how did they benefit?

The number of people with a learning disability in the area beam works in is far in excess of the number of people we support. There are no accurate statistics that show how many people live in Stafford and South Staffordshire who have a learning disability; the best we have is an estimate that 2.1% of the population fall into this category. This means that in Stafford Borough alone 2,803 individuals are potential clients, a number far beyond the total amount of people we could support during a year.

Beam's clients are those who have low to medium level learning disabilities. To access Beam's services, we won't ask for a formal diagnosis because this would be a barrier to effective support being provided. Our clients will usually live alone, be isolated, have little contact with friends and family and receive little or no support from Statutory Agencies.

Clients benefit in all manner of ways related to the projects we have on offer. If the needs of a client don't match the outcomes of the services, we have on offer we will do our best to find somewhere that offers the services that the clients need.

What we do reflects those objects set out in the memorandum of association.

This year's activity and events

Beam Activities

Funded by University Hospital North Midlands Charities Together and funded with support from the Captain Tom Foundation this was the first full year of this two-year program scheduled to end in July 2024. The program is designed to help people who are experiencing the unwanted effects of loneliness and isolation such as depression and poor mental health. Our funders also asked us to consider how this work affected demand on health services from our client group and to report on that at the end of the program.

We designed and delivered a whole host of different events through the year which are described below.

Date	Event	People attending
April 23	Universal Credit Training Courses	31
3 Rd May	Afternoon Tea at Stafford College to celebrate the Kings Coronation	7
27 th June	A visit to Staffordshire Wildlife Centre	10
25 th July	Lunch and then a visit to Stafford Park	10
22 nd Aug	A summers day look around Red Lion Farm and then an ice cream	9
26 th Aug	Rodbaston Farm brought some reptiles for the group to meet	8
25 th Oct	We went to look at all the animals at Rodbaston Farm and then had some lunch.	10
21 st November	We carried out an evaluation meeting and then had some lunch.	15
12 th December	The group went bowling at Ten pin	16
18 th December	Christmas Lunch at a local pub	17
30 th January 24	A coffee morning to discuss forthcoming events	14
February onwards	Two new groups were started, a gardening club and an arts and crafts group.	15
March	A healthy eating and cooking course started	16

Give me some credit - a Reaching Communities funded project.

This program started in August 2023 and extended our support for those people who need help with welfare benefits entitlement. However, it is a little different from the previous program. This time we have brought support with social inclusion into the program outcomes.

After the completion of the previous program, we felt that we wanted to offer more to clients once we (and they) felt that their welfare benefits were now running correctly. We reflected on the fact that Personal

Independence Payments are intended to support people buy services which will enable them live a life that is equal in opportunity to those without a disability. There is no doubt that being disabled makes life more expensive than being able bodied.

Beam wanted to give people more options to help do new things, go to new places and meet new people. For example its more expensive to go to work, go shopping and go out socially. These are all things that able bodied people take for granted.

To achieve this, we created a new Inclusion Officer post who is now working with clients to identify and access places they want to go and opportunities they want to take advantage of. We've asked ourselves questions about why marginalised people do not feel welcome in a place and what we can do to change that. We've considered what the barriers are to real and genuine inclusion from the point of view of people who have privileged positions because we are not disadvantaged through disability and are treated as equals by our community and those within it.

Building Better Opportunities (BBO) and New Start 4 U.

After several years of intense activity Building Better Opportunities came to an end. The program achieved all its targets and was a fantastic success. In October of 2023 a new program, New Start 4 u, came into being. This program, however, is much smaller in scale. We have fewer staff, a smaller budget and lower targets.

As a delivery partner Beam still hosts the Stafford Support Hub. These are extremely well attended and produce some excellent outcomes for people who we see as being furthest away from the job market and need the most support to get there. Support with Mental Health concerns remain a feature of the program.

This program provides Beam with the conduit we need when people with learning disabilities come to us with a wish to look for work or become a volunteer. The links we have with New Start 4U allow us to do that easily and with confidence. Beam also accepts referrals from New Start for clients with Learning Disabilities who need help with benefits entitlement.

The Independent Living Service

As this program moved into its second year Beam's trustees began to see some progress with income and client numbers. In October 2022 Trustees took the decision that they would give this program a minimum of three years. Towards the end of the year, we could see that, after a period of slow growth, income was beginning to rise. Trustees wanted this piece of work to cover the total employment costs of the staff member delivering the project. If the trend in growth continues this should be achievable sometime during 2024-2025.

Energy Advice

Beam applied for a Community Matters Fund grant because we recorded an ever-rising number of people looking for help with energy bills, being unable to meet the cost of heating their home, running into debt and looking to reduce their outlay on utilities. Moreover, their understanding of how tariffs work and their use on online accounts was low. The grant was used to address these issues.

Councillors Grant and The Hedley Foundation

We were successful in applying for a grant from our local councillor and The Hedley Foundation. These were used as start-up funding for our planned gardening club and arts and crafts club.

Awards 4 All grant

A grant from Awards 4 All can be very useful for purchasing all those additional things you need to make your work successful. It was used to help with our loneliness and isolation program, purchasing additional office equipment and kitchen equipment to run our training programs and Independent Living Skills Service.

Investment Policy

The significant reduction in interest rates has meant that no interest was being paid on our instant access deposit account. After some searching for a suitable provider Beam's trustees decided that £200,000 of the reserves would be transferred to The Community Foundation of Staffordshire under a Held Fund Agreement to be invested on Beam's behalf.

After the completion of a due diligence exercise Beam's trustees felt that this was the best way of ensuring that interest received is maximised. The transfer of funds was completed in March 2022. Beam considers this a long-term investment and would only draw on these funds in a financial crisis.

After several experiences where funding applications were not successful because we held too much in reserve Beam is aware that, in the event of this fund growing, we must have a plan to allocate some of these funds in the future. A plan to do this has been developed in conjunction with the previously described bid to Reaching Communities.

Principle Funding Sources

Through the year Beam's principal funding sources continued to be from Reaching Communities for the welfare benefits advice service and Building Better Opportunities employability program.

Reserves Policy

Beams trustees have reviewed their reserves policy during the year and made the following allocations to designated funds.

The Trustees have allocated a restricted reserve fund of £228,194.

- £62,513 to cover winding up costs in the event of an unplanned and unexpected shutdown.
- £165,681 to cover twelve months running costs to be used in the event of further funding not being available.

Governing document

Beam's governing documents comprise of memorandum of Association and Articles of Association.

Recruitment and appointment of the directors

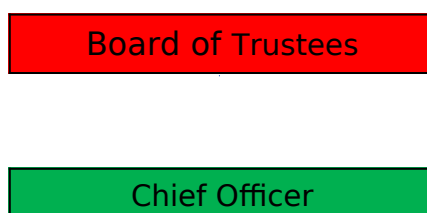
Beam will ensure that people who have a learning Disability lived experience will be part of the trustee group. At present we have people on the group who have a learning disability and also people who work with those who have a learning disability.

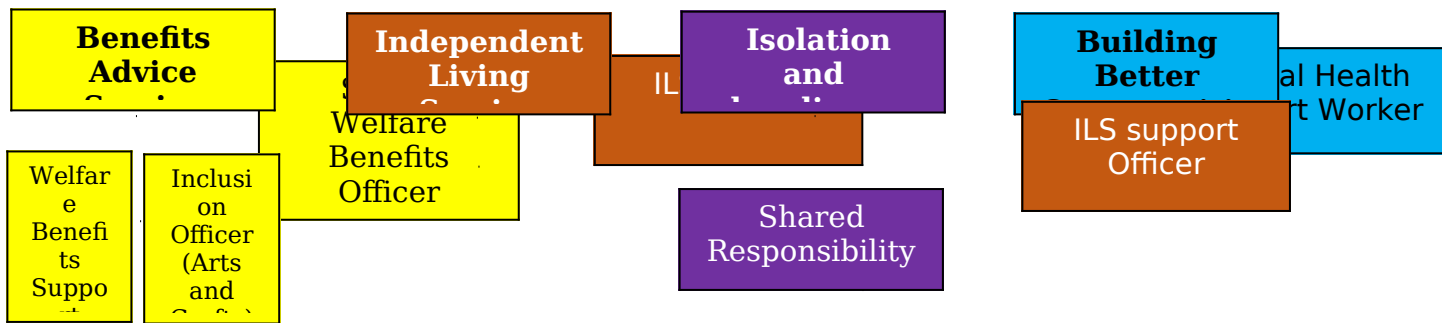
This year we created two new trustee positions, one for a staff representative and the other for a user representative. Both posts are filled.

We welcomed onto the trustee group a new member from Stafford College.

Organisational Structure

Beam is a Registered Charity and a Company Limited by Guarantee. Our internal structure can be shown by the following diagram: -





**Statement of Financial Activities for the year ended 31 March
2024
Section A Income and expenditure**

	N o t e	Unrestric ted Funds £	Restrict ed Income Funds £	Endowme nt Funds £	Total Funds £	Prior year funds £
Income						
Donations		1300			1300	195
Charitable activities			176850		176850	182207
Membership and subscriptions		270			270	262
Equipment			10529		10529	11189
Services		4490	4710		9200	
Other		3046	7523		10569	1046
Total	1				208718	194899

Expenditure						
Raising funds		-	-	-	-	-
Charitable funds					217983	205934
Separate						

material expense item						
Other						
Total	2				217983	205934

Net income for reporting period					208718	194899
Tax Payable						
Net Income after tax					208718	194899
Net gains on investments						
Net Income					208718	194899
Extraordinary Items						
Transfer between funds					(9265)	(11035)

Net Movement in Funds					(9265)	(11035)
Held fund					(8336)	
Total funds brought forward						
Total funds carried forward	3				236928	254529

Statement of Financial Activities for the year ended 31 March 2023

Section B Balance Sheet

	N o t e	Unrestric ted Funds £	Restrict ed Income Funds £	Endowme nt Funds £	Total Funds £	Prior year funds £
Fixed Assets						
Intangible assets						
Tangible assets						
Heritage assets						
Investments						
Total Fixed Assets					236928	254529

Current Assets					
Cash reserves				48529	
Creditors				3629	
Debtors				364	
Investments				191664	200000
Cash at bank & in hand				45264	54529
Total Current Assets				236928	254529

Notes to the accounts

1. Income

Total income for the year was £208,718.

Reaching Communities were Beam's most significant funder as the benefits support work continues in its expanded form with grants of £120,185

We saw a reduction in income from the Building Better Opportunities program as it came to an end with funds received reducing from £83,000 to £2,136.

University Hospital North Midlands Charities Together increased their funding contribution to the prevention of loneliness and isolation program to £30,424.

An award of £9,529 from Awards 4 All enabled Beam to purchase some much-needed equipment and resources that would help us more effectively deliver our services.

2. Expenditure

Total Expenditure for the year was £217,983.

The most significant area of expenditure continues to that of salary costs.

Subsequent to salary costs, expenditure associated with our office with regard to rent and service charges was the second highest area of expenditure.

3. Net Movement in Funds

The total deficit for the year is £17,601. This is represented by: -

- An operational deficit of £9,265

- A loss on the held fund of £8,336

Total assets at the end of the year are £236,928. The value of the held fund at this point was £191,664 giving cash reserves of £45,264.

Beam will ensure that sufficient funds are reserved to cover all liabilities and redundancy costs in the event of an emergency shutdown