

**SIMEON CENTRE COUNSELLING SERVICE**

**TRUSTEES ANNUAL REPORT AND FINANCIAL STATEMENTS**

**YEAR ENDED 31 MARCH 2023**

**Registered Charity Number: 1098428**

**SMITH & GOULDING LIMITED**  
Chartered Accountants  
& Registered Auditors  
2-4 Southport Road  
CHORLEY

## **SIMEON CENTRE COUNSELLING SERVICE**

### **TRUSTEES ANNUAL REPORT FOR THE YEAR TO 31 MARCH 2023**

#### **REFERENCE AND ADMINISTRATIVE DETAILS**

**Registered Charity Number** 1098428

**Principal Address**

Victoria Hall  
Knowsley Street  
Bolton  
Lancashire  
BL1 2AS

**Trustees**

Mr R Bradley  
Mr P Green  
Ms C Greer  
Ms J Orrell  
Ms N Thompson  
Ms E Lewis  
Rev Dr B Tomkins (resigned 11 August 2022)

**Independent Examiner**

Smith & Goulding Limited  
Chartered Accountants  
2-4 Southport Road  
Chorley  
Lancashire  
PR7 1LD

#### **STRUCTURE, GOVERNANCE & MANAGEMENT**

**Governing document**

The Simeon Centre Counselling Service is controlled by its governing document, a deed of trust dated 27 March 2003 (revised in 2008 and 2016) and constitutes an unincorporated charity. It is a non-profit making organisation and its trustees are volunteers. The Charity was registered on 8 July 2003.

**Recruitment and Training of Trustees**

The trustees are appointed by the members of the organisation at the Annual General Meeting and the trustees have the power under the governing documents to co-opt individuals who support the objects of the organisation to fill vacancies on the Board of Management. As part of their induction, new trustees are provided with information about the charity, the management structure, its history and working practices. In addition, they are also provided with extracts of the Memorandum and Articles of Association plus information from the Charity Commission regarding the duties and responsibilities of trustees.

**OBJECTIVES AND ACTIVITIES**

The objectives and activities of the Charity are to offer confidential counselling in a safe accepting environment to all members of the community irrespective of race, religion or gender. We offer a generic counselling service that is free at point of need. The charity aims to provide a one to one counselling service in a peaceful, safe and accepting environment where people can take time out to talk freely without fear of being judged.

**Public Benefit**

We have referred to and have complied with the guidance in the Charity Commission's general guidance on public benefit when reviewing our aims and objectives and in planning our future events. In particular

the trustees consider how planned activities will contribute to the aims and objectives they have set, both through the use of unrestricted and restricted funds where appropriate.

## ACHIEVEMENTS AND PERFORMANCE

### Volunteers

Through 2022-2023 we have had 78 counsellors volunteering for Simeon Centre in total:

Qualified	42 (53.8%)
Students (100 Hours Complete)	13 (16.7%)
Placement (Less Than 100 Hours Complete)	23 (29.5%)

*\*The status is based on current information as separate information was not kept at the time.*

### Volunteer Attrition

Through 2022-2023 there were 29 counsellors who stopped volunteering for Simeon Centre:

Qualified	17 (58.6%)
Students (100 Hours Complete)	6 (20.7%)
Placement (Less Than 100 Hours Complete)	6 (20.7%)

A breakdown of the reasons volunteers stopped seeing clients for us is as follows:

Employment	15 (51.7%)
Health Issues	4 (13.8%)
Performance Issues	4 (13.8%)
Ethical Dilemma	2 (6.9%)
Loss of Student Status	2 (6.9%)
Time Management (College / Employment)	2 (6.9%)

### Client Sessions Arranged

In 2022-2023 we made 3,940 counselling session appointments with clients at Simeon Centre:

Attended	3090 (78.4%)
Same Day Cancellation	357 (9.1%)
Advanced Cancellation	291 (7.4%)
Did Not Attend Without Notice	202 (5.1%)

### New Relationships

Simeon Centre has always been part of a wider network of services that work together to better support the people of Bolton. Our long-standing connections with 1-Point Network (1-Point, Beacon, Being Heard, Fortalice and MhIST) has been a testament to that over the years.

With the support of Robert (one of our volunteers and an Associate Lecturer at the University of Bolton), we have been able to build our connection with the main educational institution in the



town, to better support our aims of helping students on their way to qualification. With the assistance of Robert and Charlotte (the Programme Lead for Msc Counselling & Psychology Degree) we hope to continue this new relationship into the future.

### Tribute to Long-Term Volunteers

At its core, Simeon Centre is a team of volunteers who are dedicated to supporting others through their mental health struggles. Without our volunteers help and time, we are nothing.

We would like to pay a special tribute to the following counsellors:

- Alena who has seen clients for us since March 2010.
- Joan who has seen clients for us since March 2010.
- Fozia who has seen clients for us since February 2014.
- Wendy who has seen clients for us since April 2016.
- Ana who has seen clients for us since June 2018.
- Christine who has seen clients for us since October 2018.

### New Volunteers at Simeon Centre

There have been 38 counsellors who started to volunteer for Simeon Centre since April 2023.

It has been a source of great pride for the management to see many of those counsellor's transition from students on placement to qualified therapists who continue to volunteer for us. It cannot be overstated the volume of good each one of our recruits has done for the people of Bolton. Seeing the positive changes to our clients' lives reinforces their great work.

### Reducing Clients Missed Appointments

A large focus of the management across 2022-2023 was to reduce the number of missed sessions. Aside from the benefits of regular counselling as opposed to a broken run of appointments, the drive was to ensure that as many clients could be seen as possible in the same amount of time – given the hundreds of people on the waiting list to access the service.

A lot of time was spent working with our partners in the 1-Point Network and a large portion of our financial resources was spent on supporting clients to attend (via increased information at the start of therapy and weekly text reminders of their counselling appointments). However, while it was worth the time and effort spent to make a positive impact, it proved to have little to no impact in the end. Missed sessions across the network still amount to 25%.

### Looking to the Future

In May 2023, Jen (our Service Coordinator since July 2019) left Simeon Centre to expand her role working for 1-Point as the lead of their new Graduate Scheme. While it does not fall under 2022-2023 we wanted to use this time to give thanks to her for all she has done.

Since Jen joined Simeon Centre, she has supported the development of countless numbers of students as they worked towards qualification. Jen has also given sage words of advice and guidance to our numerous qualified therapists over the years to support them in client work.

Aside from the massive positive impact Jen had on the lives of our counsellors and their clients, she was a rock of encouragement to the two managers she worked with since 2019.

We now welcome Jen's replacement Lisa in the role of Service Coordinator. Since joining the team, first as a volunteer counsellor in April 2023, and then in post since July 2023, Lisa has made a huge contribution to the service we provide and has already shown to us all that her warm and friendly nature and professionalism in difficult times will be a huge asset.

We are also extremely sad to announce that our Treasurer on our Board of Trustees, Natacha Thompson, will be stepping down at the upcoming Annual General Meeting. Natacha has been on our Board since July 2015 and has been a major support to the management in that time, with her advice, guidance, insight, and passion for supporting the charity in all forums.

There are ongoing conversations around the changes being made within NHS England and how that will affect the current agreement the 1-Point Network have with them as a provider of one-to-one therapeutic services. We will keep stakeholders updated when we know more.

## **FINANCIAL REVIEW**

### **Summary of the Year**

The financial results for the year and the position at the year-end are set out in the following Receipts and Payments account and Statement of Assets and Liabilities.

### **Risk**

The trustees recognise that the most significant risk of the charity is that of loss of external funding. Contracts between 1point and the NHS are reviewed on a regular basis, usually covering a three-year period. Each renegotiation period represents a risk for 1point and hence for the Simeon Centre. Due to the nature of our work, a sudden cessation of service is likely to have detrimental impact on our clients. Furthermore, should current funding cease, the most likely source of alternative income would be via a grant. Application procedures for grants tend to be lengthy and drawn out, further impacting on the ability of the charity to continue providing services.

### **Reserves Policy**

To effectively manage the risk described above, the trustees have reviewed the reserves policy this year and decided that reserves equal to one year's running costs should be set aside. The amount will be reviewed regularly.

### **Investment Policy**

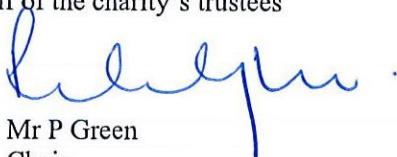
Investment decisions are made by the management committee. Currently, surplus funds are held in a high interest savings account. Surplus funds are held for the purposes of maintaining reserves as described above.

## **DECLARATION**

The trustees declare that they have approved the Trustee's Report above.

Signed on behalf of the charity's trustees

Signature:



Full Name: Mr P Green

Position: Chair

Date: 16 - 01 - 23



**INDEPENDENT EXAMINER'S REPORT ON THE ACCOUNTS TO THE TRUSTEES  
OF SIMEON CENTRE COUNSELLING SERVICE**

I report to the trustees on my examination of the accounts of Simeon Centre Counselling Service for the year ended 31 March 2023, which are set out on the following pages.

**Responsibilities and basis of report**

As the charity trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act"). The charity's trustees consider that an audit is not required for this year under section 144 (2) of the Act and that an independent examination is needed.

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

**Independent examiners' statement**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

**Independent examiner's statement**

I have completed the 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 s. 130 of the Act; or
- (2) the accounts do not accord with those records; 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.



**Stephen Gardiner ACA CTA**  
**Chartered Accountant**  
**SMITH & GOULDING LIMITED**  
**2-4 Southport Road**  
**CHORLEY**  
**Lancashire PR7 1LD**

Dated: 3 November 2023

# SIMEON CENTRE COUNSELLING SERVICE

## STATEMENT OF ASSETS AND LIABILITIES

AS AT 31 MARCH 2023

	Unrestricted funds	Restricted funds	Total	2022
<b>Monetary assets</b>				
Cash at bank - current account	29,204	-	29,204	30,704
Cash at bank - deposit account	75,574	-	75,574	74,026
Cash in hand	382	-	382	229
	<u>105,160</u>	<u>-</u>	<u>105,160</u>	<u>104,959</u>
<b>Non-monetary assets</b>				
<b>Fixed assets</b>				
The Charity's fixed assets which are stated at cost are maintained on a regular basis and are all in good condition.				
Fixtures, fittings and equipment (acquired from 2013 to 2023)	6,240	-	6,240	5,063
<b>Other assets</b>				
Debtors - 1point	23,010	-	23,010	24,388
<b>Liabilities</b>				
Rent	-	-	-	1,042
PAYE	-	-	-	561
Pension	-	-	-	491
Telephone	221	-	221	-
Expenses claims	976	-	976	1,198
Accountancy fees	720	-	720	570

The accounts were approved by the Board of Trustees on 16-9-23 and were signed on their behalf by:

  
..... Mr P Green, Chair

**SIMEON CENTRE COUNSELLING SERVICE**

**RECEIPTS AND PAYMENTS ACCOUNT**

**FOR THE YEAR ENDED 31 MARCH 2023**

	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>Total</b>	<b>2022</b>
<b>Receipts</b>				
Donations	1,315	-	1,315	1,781
Gift Aid claims	-	-	-	122
Provision of counselling services	84,231	-	84,231	73,931
Deposit interest	<u>1,548</u>	-	<u>1,548</u>	<u>733</u>
Total receipts	<u>87,094</u>	-	<u>87,094</u>	<u>76,567</u>
 <b>Direct charitable expenditure</b>				
Supervision and training	14,098	-	14,098	9,357
Travel	3,290	-	3,290	1,139
Professional subscriptions	1,939	-	1,939	1,360
 <b>Other support costs</b>				
Wages and pension	45,291	-	45,291	46,579
Rent, rates and water	14,042	-	14,042	12,570
Insurance	415	-	415	534
Telephone	2,088	-	2,088	1,503
Postage and stationery	867	-	867	168
Sundries	631	-	631	187
Meeting expenses	189	-	189	346
Accountancy	894	-	894	750
Professional fees	455	-	455	296
Consultancy services	462	-	462	-
Equipment purchases	1,187	-	1,187	408
Repairs and maintenance	<u>1,045</u>	-	<u>1,045</u>	<u>481</u>
Total payments	<u>86,893</u>	-	<u>86,893</u>	<u>75,678</u>
Net receipts for the year	201	-	201	889
Bank and Cash Balances at 31 March 2022	<u>104,959</u>	-	<u>104,959</u>	<u>104,070</u>
Bank and Cash Balances at 31 March 2023	<u><u>105,160</u></u>	-	<u><u>105,160</u></u>	<u><u>104,959</u></u>

**NOTE:** These accounts have been prepared on the Receipts & Payments Basis and comply with the appropriate legal requirements for this basis to apply.