

POTS UK

England & Wales · Charity number 1159813

Details

Other names	POSTURAL TACHYCARDIA SYNDROM UNITED KINGDOM
Status	Registered
Legal form	CIO
Registered	2015-01-06
Register	View on the Charity Commission register

Contact

Address Oakfield Cottage
Stratford Road
Wootton Wawen
Henley-in-Arden
B95 6DF

Phone 00000000000

Email info@potsuk.org

Website www.potsuk.org

Activities

Objects: THE OBJECTS OF THE CIO ARE:1) FOR THE RELIEF OF SICKNESS AND THE PRESERVATION AND PROTECTION OF GOOD HEALTH OF THOSE SUFFERING FROM POSTURAL TACHYCARDIA SYNDROME (POTS);2) TO ADVANCE THE EDUCATION OF THE PUBLIC IN ALL ASPECTS OF THE SYNDROME, IN PARTICULAR THOSE INVOLVED IN THE DIAGNOSIS, TREATMENT AND CARE OF THOSE SUFFERING FROM POTS; AND3) TO CARRY OUT, OR TO PROVIDE FUNDS TO SUPPORT RESEARCH INTO POTS, ITS CAUSES, TREATMENT AND CURE AND PUBLISH THE USEFUL RESULTS OF SUCH RESEARCH.

Activities: Providing evidenced based information in the form of a website and information leaflets suitable for patient and medical professionals.Run educational and support meetings Encourage journal publications Support researchProduce a newsletter for membersSupport Fundraising activitiesLobby for improved services for patientsSupport clinicians in service development

Classification

- **How:** Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives
- **Who:** Other Defined Groups

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-05	£67,460	£72,428	-	-
2024-04-05	£77,164	£47,864	-	-
2023-04-05	£71,360	£57,036	-	-
2022-04-05	£70,837	£93,578	-	-
2021-04-05	£46,782	£34,945	-	-

Trustees

Name	Role	Appointed
Dr LESLEY KAVI	Chair	2015-02-01
Alex Wigley		2026-01-19
Chloe Louise Smerklo		2021-05-10
Dr MORWENNA OPIE		2015-02-01
Lisa Amy Bradford		2021-08-02
MICHAELA CORNES		2015-10-01

POTS UK

England & Wales - Charity number 1159813

Accounts

Chairperson's Report

A message from our Chair

As I approach my 10th year as chairperson for PoTS UK, it is a pleasure to reflect on the changes, successes and challenges the charity has faced since it started in 2010.

Having developed our 3-year strategy in 2023-24, this year has been clearly focussed on forging ahead with our aims and goals. 2024-25 has been as busy as ever and we are proud of our achievements. As always, my primary thanks must go to our wonderful community who support us in so many ways. It has been another successful year for fundraising and we extend our heartfelt thanks to everyone who has fundraised or donated. We hosted our first PoTS UK celebration event in February 2025, and it was a joy to join together staff, fundraisers, medical advisors and volunteers to celebrate the positive impact they have on our charity.

There are many highlights from the past year, but I would like to pay particular attention to the following:

Parliamentary Campaign - Compared to this time last year, we feel the awareness of PoTS within UK governments and the NHS has increased significantly and ultimately, this will lead to positive change. In what must be our best team effort to date, the PoTS community came together in their support for our parliamentary campaign and managed to reach out via email to 575 of 650 MPs. In total, 2295 emails were sent, and we were delighted to be told by one MP that he has never received so many emails on one topic. This is something to be proud of and shows the strength in numbers! We must all play our part.

It was a pleasure to visit Portcullis House alongside a team of trustees, nurse specialists, consultants and staff to meet MPs to discuss inequitable access to healthcare for people with PoTS. MPs were given clear actions to take away and we are very grateful to those MPs who have shown interest and support.

Communications and responses from the Department of Health and Social Care are inaccurate, unhelpful and lacking in any guaranteed action. It mirrors the poor response to the January GOV.UK petition. Despite requesting a meeting, the DHSC has refused to meet with us due to time constraints. We will continue to respond and challenge them. I must say a special thank you to Sophie West who launched the petition and has shown such determination and strength in pushing it forward.

In July 2022, Jane Clarke initiated a petition to the Scottish Parliament requesting better services for people with dysautonomia. We have been working with Jane and Chest Heart Stroke Scotland to challenge the Scottish Government and NHS Scotland's false claims that there are high quality services and national guidelines available. This work is ongoing. All responses to date can be found here: <https://petitions.parliament.scot/petitions/PE1952> or <https://www.parliament.scot/get-involved/petitions/view-petitions/pe1952-specialist-services-for-patients-with-autonomic-dysfunction>

As health is a devolved matter in Scotland, Wales and Northern Ireland we need to ensure we are reaching out to the Members of the Scottish Parliament (MSPs), Members of the Senedd (MSs) and Members of the Legislative Assembly (MLAs). This will form part of our work in 2025/26.

We are forever reminded that our challenges are a marathon, not a sprint and this could not be truer than in the case of improving services. We know changes won't happen overnight but there has been a palpable shift in awareness and strides are being taken in the right direction.

Training Event for Healthcare Professionals – In March 2024, we were delighted to host a hybrid educational training event, attended by over 300 nurses and healthcare professionals to learn more about Autonomic Dysfunction including diagnosis, management and treatment. It is always fantastic to have the opportunity to raise awareness and knowledge amongst healthcare professionals and we continue to encourage trusts, ICBs and health boards to reach out to us to deliver this important education.

National PoTS guidelines would improve awareness, understanding of PoTS, and access to healthcare. It was a pleasure to meet with a team of PoTS experts in October 2024 to drive this forward and we hope that 2025/26 will show significant progress in this area.

I remain very proud of our **Peer Support Group** programme that have been running for almost 4 years now. Our team of volunteers has grown again throughout 2024/25, and they are committed, caring and compassionate. They dedicate time to not only run the groups but also to review and reflect on what changes could be made to improve them. We have been pleased to answer requests for topic groups on Neurodiversity, LGBTQIA+, and living with PoTS over the age of 50. The groups are diverse, inclusive and safe spaces. I encourage everyone to attend and see how our hosts can put you at ease and make the group work for your needs.

As always, I extend my thanks to our administrative team and my fellow trustees who all share the same passion, drive and determination. 2024/25 has welcomed lots of new volunteers and I am grateful for the role played by each individual.

I look forward to the year ahead. We are working towards holding an educational Masterclass in 2026, bringing together our community at a patient event and continuing to push our parliamentary campaign in order to improve services.

Raising awareness is at the heart of what we do and what we need to achieve. I urge everyone to reflect on what part they can play and not to underestimate the value in sharing social media posts, sharing your story and answering surveys to help us grow our pool of data that is an invaluable resource.

The annual report includes further information on the financials aspects, further achievements and a look ahead to the next year.



Dr Lesley Kavi

PoTS UK

Trustees Annual Report

2024 – 2025

Charity Overview

Name of the Charity: PoTS UK.

Registration number: 1159813, Charitable incorporated organisation (from 6 Jan 2015).

Address: Oakfield Cottage, Stratford Rd, Wootton Wawen, Henley-in-Arden B95 6DF.

Trustees:

Dr Lesley Kavi (Chair)

Lisa Bradford (Treasurer)

Dr Morwenna Opie-Moran

Michaela Nuttall RN

Chloe Smerklo

General Manger:

Joanne Bullingham

Charity Administrators:

Denise Chapman

Nikki Mills

Medical advisors:

Dr Nick Gall

Prof Julia Newton

Dr Arnold Deering

Dr Satish Raj

Dr Blair Grubb

Dr Ian Wilkinson

Dr Jane Simmonds

Melloney Ferrar

Helen Eftekhari

Prof Melvin D Lobo

Dr Sam Waterman

Dr Robert Sheldon

Medical patrons and supporters:

Dr Nick Gall

Prof Michael Gammage

Cat Smith MP

Dr Philip Hammond

Adam Jacobs

Peter Capaldi

Primary Bankers:

NatWest Bank

Royal Bank of Scotland (Reserves Account)

Independent examiner:

Beverly Walker

Tall Horse Consultancy

SBC House

Restmor Way

Wallington

SM6 7AH

Structure, Governance, and Management

PoTS UK is a Charitable Incorporated Organisation as of January 2015, constituted from that date and is governed by the Charity's constitution.

Organisational Structure:

The Charity is run by five trustees who are healthcare professionals, patients or carers of people affected by PoTS. Trustees are elected by mutual agreement by all other trustees and remain in post for a minimum of three years. The day-to-day operations are managed by the Chair and General Manager supported by a committed team of staff and volunteers. All members of the team work remotely and there are no office premises.

The charity employs three members of staff (making up just over 1FTE).

Charity Objectives

Our Mission, Vision and Values

PoTS UK supports and educates patients, family, friends and healthcare professionals within the United Kingdom about this under recognised and commonly misdiagnosed condition by sharing up to date evidence and resources.

- We work with healthcare professionals and other charities in the UK and abroad, and advocate for our members by seeking better NHS services, more research, and targeted treatments for people with PoTS.
- We aim to connect patients in a safe environment to empower them to self-manage their condition and reduce isolation.
- We produce evidence-based educational content for healthcare professionals which will improve awareness of PoTS, diagnosis and management, and improve health services for patients.

Mission: To provide accessible evidence informed support, education, and awareness for our growing community.

Vision: To optimise the health and quality of life of everyone impacted by PoTS.

Values:

We are committed to supporting the PoTS community by:

- Ensuring PoTS is universally known.
- Promoting fair and equitable access to healthcare.
- Facilitating ongoing advancement of our understanding of the condition and its management.
- Providing trusted and evidence informed resources.
- Challenging ourselves to be more inclusive, sustainable, and connected.
- Leading the change for a compassionate and open mindset.
- Collaborating with others who share our ambitions.

To achieve our mission, vision and values, our activities include:

- Educating individuals and groups of medical professionals.
- Providing evidenced based information in the form of a website which is accredited by the Patient Information Forum.
- Creating and distributing leaflets suitable for patient and medical professionals.

- Encouraging and engaging in journal publications and research.
- Producing newsletters for members.
- Encouraging accurate media coverage.
- Offering regular educational webinars (recorded and published on our YouTube channel).
- Providing online peer support groups.
- Using social media platforms to offer support, educate and raise awareness.
- Full details are available from our website www.potsuk.org

Strategy 2024-2026

The trustees developed a 9-point plan when developing the Charity's 3-year strategy at the AGM in January 2024 and have a detailed plan of work for each area.

These are:

1. Develop and grow our services to best suit the current and unmet needs of our beneficiaries.
2. Educate and empower the public to know and understand the signs and symptoms of PoTS and take action to improve their health.
3. Educate healthcare professionals to improve outcomes for people with PoTS.
4. Influence the health and social care system to identify and provide services to people with PoTS and report progress.
5. Build and improve engagement with those connected with us
6. Improve our inclusivity.
7. Increase our reach to raise awareness of the charity across the United Kingdom.
8. Continue to grow a sustainable organisation.
9. Measure and demonstrate our impact.

Public benefit statement

The trustees identify the need to have charitable aims and objectives to comply with the Charity commission's public benefit guidance.

Achievements and Performance

- Our 'What is PoTS?' video that launched on 1st October 2024 has had almost 50,000 views on YouTube and huge interaction on social media. This has been our most successful video to date.
- We have continued to run and develop online peer support groups, offering at least 10 each month. We have additional monthly topic groups including: neurodiversity, LGBTQIA+, periods and menopause.
- Awareness Day/Month 2024 – this included over 60 buildings across the UK lighting up purple, a daily yoga challenge and a surge in social media engagement through #31waystogetinvolved.

- GOV. UK petition published in January 2025 (with thanks to Sophie West). This has achieved over 17,000 signatures to date
- UK Parliamentary Campaign – use of campaigning software to reach large volumes of MPs, visit to Portcullis House and communications ongoing with the Department of Health and Social Care
- Since 2022 we have been pleased to support an ongoing petition to the Scottish Parliament for improved access to healthcare for people with dysautonomia, including PoTS and continue to work on this.
- Teaching/Education – ran a hybrid training event for over 300 healthcare professionals on Autonomic Dysfunction. Also ran independent training sessions across the country.
- Expanded our team of volunteers who help with a range of tasks including peer support, social media, and email enquiries.
- Held our first celebration event to recognise our team of medical advisors, volunteers and fundraisers.
- In association with the universities of Coventry and Warwick, we initiated a large-scale survey of adults with PoTS which we continue to analyse and process.
- Fundraising events – Yoga Challenge during Awareness Month and new annual fundraiser ‘Walk and Talk for PoTS’.
- Development of new web pages and comprehensive update of pages older than 3 years in line with PIF guidelines – this remains an ongoing project.
- Service provision project launched November 2023, and is ongoing. Freedom of Information Requests were circulated to all NHS commissioning organisations and acute trusts in England, Wales, Scotland and Northern Ireland. They reported that there are no established care pathways or formally commissioned services in place for people diagnosed with PoTS. There is limited specialist service provision available to patients with PoTS (21 trusts) across England, and no service provision generally available in Scotland, Wales and Northern Ireland, which is extraordinary for such a common, complex and disabling condition. Service provision for children is especially poor. We intend to use this information, alongside an Access to Services Survey to show the true picture that people with PoTS are facing when trying to access care. Reaching out to Integrated Care Boards/Trusts is likely to be our next step forward.
- The board made the decision made not to proceed further with the development of the PoTS App as it didn’t meet the needs of our target audience.
- Completed comprehensive Digital Strategy Review in order to help us grow our online presence.

Impact and Outcomes

- Significant increase in awareness within Government through campaigning and the petition.
 - Live education offered to hundreds of healthcare professionals with video content available online for catch up
 - We have a growing team of volunteers who offer a diverse range of skills and experience which enhances the support we can offer to our community.
 - Social media analysis shows increased presence
 - Greater support available to our community through peer support groups.
-

Looking ahead - Plans for 2025/26

In line with our strategy, our priorities over the next 2 years year will include:

- An educational masterclass for healthcare professionals
 - A patient retreat/ social get-together
 - Investment in our volunteers through training and team building
 - Development of National Guidelines for both adults and children
 - Continue with our current project to investigate NHS service provision for patients with Postural Tachycardia Syndrome throughout the UK with a view to improving understanding, access, and outcomes for patients.
 - Continue campaigning in parliament
 - Continue developing the peer support groups offering some social/craft sessions. Also explore a group for children (under 13s)
 - Maximising all opportunities to teach and educate
 - Celebration event to thank volunteers and fundraisers
 - Access to services survey to get a true understanding of the challenges our community are facing.
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Financial review

Total income for 2024-25 was £67,460.

Total expenditure for the year was £72,428. This is a substantial increase in expenditure from 2023-24 (a low expenditure year) due to employing an additional member of staff and funding a number of projects including our Freedom of Information work, Parliamentary Campaign and Healthcare Professional Training Event. These expenses are recorded under 'Project Expenses' in the CC16a of our annual accounts.

The main areas of expenditure were:

- Training Event for Healthcare Professionals
- Development of National Guidelines
- Parliamentary Campaign/lobbying
- Freedom of Information project
- Staff wages
- Continuous management and maintenance of the online peer support groups.
- Training for staff and volunteers
- Software licences
- Travel/accommodation/meeting expenses for trustees, volunteers, and others who assist in pursuing the aims of the Charity.
- Website maintenance and mailing system

Reserves Policy

The trustees have established a reserves policy to maintain a level of unrestricted funds equivalent to 1-year of operational expenditure, approximately £45,000. This ensures that the charity can continue its activities in the event of unforeseen financial difficulties. This reserves policy will be reviewed annually at the AGM to ensure the amount remains suitable and

considers any changes within the charity. At the AGM in January 2024, trustees agreed to move a further £20,000 into the reserves account to take in to account rising costs and increase in staff.

The outlook for PoTS UK remains positive and careful management of funds will continue to be essential to ensure that the Charity remains in a healthy position.

Statement of Trustees' Responsibilities

The trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards.

Report Approval

The PoTS UK Trustee Report for 2024-2025 was approved by the board on 25th August 2025 meeting.

The report was signed on behalf of the trustees by:



Professor Lesley Kavi, Trustee and Chair, PoTS UK.

Date: 22nd October 2025



Receipts and payments accounts

CC16a

For the period from	Period start date 06/04/2024	To	Period end date 05/04/2025
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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 £
A1 Receipts					
Donations	66,128	-	-	66,128	76,744
Bank interest	1,332	-	-	1,332	420
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	67,460	-	-	67,460	77,164
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	67,460	-	-	67,460	77,164
A3 Payments					
Printing, postage and stationary	2,420	-	-	2,420	1,717
Advertising and promotional costs	-	-	-	-	-
Wages and salaries	36,484	-	-	36,484	26,564
Computer expenses and consumables	-	-	-	-	100
Fundraising costs	772	-	-	772	672
Accountancy fees	8,104	-	-	8,104	817
Training	1,060	-	-	1,060	1,463
Purchase of promotional items	3,590	-	-	3,590	4,387
Insurance	551	-	-	551	551
Legal & professional	-	-	-	-	600
Depreciation	-	-	-	-	1,138
Software and subscriptions	5,997	-	-	5,997	5,166
PayPal fees	604	-	-	604	237
Project expenses	8,062	-	-	8,062	1,749
Website development and maintenance	3,666	-	-	3,666	2,703
Other expenses	459	-	-	459	-
Speaker Fund	480	-	-	480	-
Membership fees	182	-	-	182	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	72,428	-	-	72,428	47,864
A4 Asset and investment purchases, (see table)					
Other assets	-	-	-	-	2,276
Sub total	-	-	-	-	2,276
Total payments	72,428	-	-	72,428	50,140
Net of receipts/(payments)	- 4,968	-	-	- 4,968	27,024
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	121,412	-	-	121,412	94,388
Cash funds this year end	116,444	-	-	116,444	121,412

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 £
B1 Cash funds	Bank accounts	116,444	-	-
		-	-	-
		-	-	-
	Total cash funds	116,444	-	-
	<small>(agree balances with receipts and payments account(s))</small>	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	Other assets	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	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
PoTS UK

**On accounts for the year
ended**

5 April 2025

**Charity no
(if any)**

1159813

Set out on pages

1 and 2

(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 **05/04/2025**.

**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:

21/10/2025

Name:

Beverley Walker

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

ACCA

Address:

Tall Horse Consultancy Services Ltd

Chartered Certified Accountants

SBC House
Restmor Way
Surrey
SM6 7AH

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.

POTS UK

England & Wales - Charity number 1159813

Accounts

Chairperson's Report

A message from our Chair

I have been involved with PoTS UK since 2010 and chairperson since July 2016. I remain committed to reaching our vision of 'optimising the health and quality of life of everyone impacted by PoTS'. I know this will take time, but we are making significant strides forwards and we are very grateful to have a committed and passionate community at our side.

2023-24 was a busy and successful year for PoTS UK. The development of our 3-year strategy has allowed us to be clear in our goals and structured with the work we undertake.

On behalf of myself and fellow trustees, I would like to offer our heartfelt thanks to everyone who has fundraised or donated. 2023/24 is a record year for the charity in terms of income and we are always amazed by the generosity, determination, and support. Our charity would not exist without these incredible efforts.

There are so many highlights from the past year, but I would like to pay particular attention to the following:

Thanks to the support of our community with our **parliamentary campaign**, we managed to reach over 250 MPs throughout the UK and started to make some noise where it's needed. Alongside this, we also contacted every health board or equivalent in Scotland, England, Northern Ireland and Wales to explain what PoTS is and ask about the services they provide. The change of government following the General Election meant our plans needed to be put on hold but we are relaunching this campaign in January 2025.

I am extremely proud of our **Peer Support Groups** that have been running for almost 3 years now. Our team of volunteers has grown considerably throughout 2023/24 and they are committed, caring and compassionate. The success of these groups lies with them. The feedback we receive is wonderful and we will continue to invest in training and support to ensure these groups thrive.

Updating our website is a critical part of the work we do and we are accredited by the Patient Information Forum as being Trusted Information Creators. We have worked hard this year to keep the information up to date and this is an ongoing process. Thank you to everyone who volunteers their time to review the latest literature and update the pages accordingly. This takes considerable amounts of time, but we think it is essential that the information we are sharing is as evidence based, contemporary and as helpful as possible.

Teaching and education is an essential part of what PoTS UK do. It is always fantastic to have the opportunity to raise awareness with healthcare professionals and we encourage trusts and health boards to reach out to us to deliver this important education. Thank you to those who welcomed us this year and we hope you have been able to put this training in to practice.

Support for individuals. It has been a pleasure to welcome a team of specialist PoTS nurses who commit their time to answering queries that we receive via email. They are a huge asset to our team.

Awareness Day on 25th October is growing year on year and I took great pride in seeing over 80 buildings in the UK light up purple in 2023. Edinburgh Castle looked particularly magical. A lot of thought and work goes into Awareness Month and the day itself and I would like to thank everyone who is involved in its success.

I would like to thank our administrative team who are all passionate about this charity, and work well beyond the expectations of any employer. I would also like to thank my fellow trustees who are committed and wise and share in the challenges and successes of PoTS UK. **All** of our volunteers play an enormous role in the success of our charity, and I am constantly amazed and grateful for everything they do. PoTS UK is a team effort, and I am privileged to be part of it.

I look forward to the year ahead and feel confident it will be a positive year for the charity following our strategy and being ever mindful of our mission, vision, and values.

The annual report includes further information on the financials aspects, further achievements and a look ahead to the next year.

Dr Lesley Kavi

PoTS UK

Trustees Annual Report

2023 - 2024

Charity Overview

Name of the Charity: PoTS UK.

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Royal Bank of Scotland (Reserves Account)

Independent examiner:

Michael Brown - Chartered Accountant

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The Kinetic Centre

Theobald Street

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Hertfordshire

WD6 4PJ

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In November 2023, the charity employed its 3rd member of staff (making up just over 1FTE) increasing the capability and capacity within the busy administrative team.

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Our Mission, Vision and Values

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- Providing online peer support groups.
- Using social media platforms to offer support, educate and raise awareness.
- Full details are available from our website www.potsuk.org

Strategy 2024-2026

The trustees developed a 9-point plan when developing the Charity's 3-year strategy at the AGM in January 2024 and have a detailed plan of work for each area.

These are:

1. Develop and grow our services to best suit the current and unmet needs of our beneficiaries.
2. Educate and empower the public to know and understand the signs and symptoms of PoTS and take action to improve their health.
3. Educate healthcare professionals to improve outcomes for people with PoTS.
4. Influence the health and social care system to identify and provide services to people with PoTS and report progress.
5. Build and improve engagement with those connected with us
6. Improve our inclusivity.
7. Increase our reach to raise awareness of the charity across the United Kingdom.
8. Continue to grow a sustainable organisation.
9. Measure and demonstrate our impact.

Public benefit statement

The trustees identify the need to have charitable aims and objectives to comply with the Charity commission's public benefit guidance.

Achievements and Performance

- We have continued to run and develop online peer support groups, offering at least 10 each month.
- Awareness Day/Month 2023 - this included over 80 buildings across the UK lighting up purple, a daily yoga challenge and a surge in social media engagement through #31waystogetinvolved.
- UK Parliamentary Campaign - our community contacted over 250 MPs and began to change the response from the Government in terms of their understanding of current service provision.
- Since 2022 we have been pleased to support an ongoing petition to the Scottish Parliament for improved access to healthcare for people with dysautonomia, including PoTS.
- Teaching/Education - we recorded a podcast for Capita who undertake some PIP Assessments for the DWP and want to develop tools to help their assessors when assessing people with PoTS. Additionally, training was delivered to Swansea University Wellbeing and Disability Service to enable them to better support their students.
- Expanded our team of volunteers who help with a range of tasks including peer support, social media, and email enquiries.
- In association with the universities of Coventry and Warwick, we initiated a large scale survey of adults with PoTS which we continue to analyse and process.
- Fundraising events - Yoga Challenge and plans for new annual fundraiser 'Walk and Talk for PoTS'.
- Attended British Association for Nursing in Cardiovascular Care (BANCC) conference to represent PoTS UK.
- Development of new web pages and comprehensive update of pages older than 3 years in line with PIF guidelines - this remains an ongoing project.
- Service provision project launched November 2023 (ongoing) -In the initial phases of this project, we contacted every health service commissioning body in Scotland, England, Northern Ireland and Wales to investigate the clinical services that they provide for people with PoTS. We recruited a new member to the team, who has a wealth of experience in developing services to manage this project. This is on a self-employed basis.
- Preparation for our nurses training event in April 2024.
- Joined TikTok to reach new audiences.

Impact and Outcomes

- Increased attention on fundraising opportunities has led to a record year of income.
- We have a growing team of volunteers who offer a diverse range of skills and experience. This enhances what the charity is able to offer our community.

- Increased presence on social media – as a result, our medical membership and patient membership have increased considerably as well as followers on all social media channels showing an increased awareness and desire for knowledge.
 - Greater support available to our community through peer support groups.
-
-

Looking ahead - Plans for 2024/25

In line with our strategy, our priorities over the next 2 years year will include:

- Host meeting with PoTS specialists and develop National PoTS guidelines
 - Continue with our current project to investigate NHS service provision for patients with Postural Tachycardia Syndrome in the UK with a view to improving understanding, access, and outcomes for patients.
 - Relaunch the parliamentary campaign with an aim to hosting a parliamentary event and securing a question/debate at Westminster.
 - Development and launch of our new 'What is PoTS?' video to be placed on the homepage of the website.
 - Launch and continuing the development of our PoTS App
 - Continue developing the peer support groups and the training available to our volunteers with a focus on neurodiversity.
 - Maximising all opportunities to teach and educate
 - Celebration event to thank volunteers and fundraisers
-
-

Financial review

Total income for 2023-24 was £77,163.85 This is an 8% increase on 2022-23.

Total expenditure for the year was £47,868.58 a 16% decrease on 2022-23. No major events were held in this financial year which explains the reduced expenditure. There was an investment in IT of £3413.55 which is removed from the I&E account but replaced with annual depreciation.

Main areas of expenditure were:

- Staff wages
- Continuous management and maintenance of the online peer support groups.
- Training for staff and volunteers
- Software licences
- Travel expenses for trustees, volunteers, and others who assist in pursuing the aims of the Charity.
- Website maintenance and mailing system

Reserves Policy

The trustees have established a reserves policy to maintain a level of unrestricted funds equivalent to 1-year of operational expenditure, approximately £45,000. This ensures that the charity can continue its activities in the event of unforeseen financial difficulties. This reserves policy will be reviewed annually at the AGM to ensure the amount remains suitable and considers any changes within the charity.

The outlook for PoTS UK remains positive and careful management of funds will continue to be essential to ensure that the Charity remains in a healthy position.

Statement of Trustees' Responsibilities

The trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards.

Report Approval

The PoTS UK Trustee Report for 2023-2024 was approved by the board on 02/12/2024 meeting.

The report was signed on behalf of the trustees by:



Professor Lesley Kavi, Trustee and Chair, PoTS UK.

Date: 19th December 2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

POTS UK

1159813

Receipts and payments accounts

CC16a

For the period
from

Period start date
06/04/2023

To

Period end date
05/04/2024

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 £
A1 Receipts					
Donations	76,744	-	-	76,744	50,725
Sales of merchandise	-	-	-	-	2,635
Bank interest	420	-	-	420	-
Grant to fund Masterclass	-	-	-	-	18,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	77,164	-	-	77,164	71,360
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	77,164	-	-	77,164	71,360
A3 Payments					
Printing, postage and stationary	1,717	-	-	1,717	1,004
Advertising and promotional costs	-	-	-	-	3,747
Wages and salaries	26,564	-	-	26,564	26,790
Computer expenses and consumables	100	-	-	100	2,448
Fundraising costs	672	-	-	672	-
Accountancy fees	817	-	-	817	2,220
Trustee travelling and other expenses	-	-	-	-	1,134
Office Supplies	-	-	-	-	308
Training	1,463	-	-	1,463	409
Purchase of promotional items	4,387	-	-	4,387	5,983
Insurance	551	-	-	551	611
Legal & professional	600	-	-	600	-
Depreciation	1,138	-	-	1,138	-
Research	-	-	-	-	1,588
Software and subscriptions	5,166	-	-	5,166	695
PayPal fees	237	-	-	237	216
Cost of providing masterclass	-	-	-	-	9,883
Meeting expenses	1,749	-	-	1,749	-
Website development and maintenance	2,703	-	-	2,703	-
Sub total	47,864	-	-	47,864	57,036
A4 Asset and investment purchases, (see table)					
Other assets	2,276	-	-	2,276	-
	-	-	-	-	-
Sub total	2,276	-	-	2,276	-
Total payments	50,140	-	-	50,140	57,036
Net of receipts/(payments)	27,024	-	-	27,024	14,325
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	94,388	-	-	94,388	102,801
Cash funds this year end	121,412	-	-	121,412	117,126

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 £
B1 Cash funds	Bank accounts	121,412	-	-
		-	-	-
		-	-	-
	Total cash funds	121,412	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	Other assets	2,276	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	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
PoTS UK

**On accounts for the year
ended**

5 April 2024

**Charity no
(if any)**

1159813

Set out on pages

1 and 2

(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 **05/04/2024**.

**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:

20/12/2024

Name:

MICHAEL BROWN

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

ACCA

Address:

SOBELL RHODES LLP

CHARTERED ACCOUNTANTS

THE KINETIC CENTRE
THEOBALD STREET
ELSTREE
HERTFORDSHIRE
WD6 4PJ

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.

POTS UK

England & Wales - Charity number 1159813

Accounts



PoTS UK Trustees Annual Report 2022 – 2023

5th February 2024



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<i>Structure, Governance, and Management</i>	<u>6</u>
<i>Significant Activities</i>	<u>7</u>
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PoTS UK Trustees Annual Report 2022 - 2023

Charity Overview

Name of the Charity: PoTS UK.

Registration number: 1159813, Charitable incorporated organisation (from 6 Jan 2015).

Address: Oakfield Cottage, Stratford Rd, Wootton Wawen, Henley-in-Arden B95 6DF.

Trustees:

Dr Lesley Kavi (Chair)
Lisa Bradford (Treasurer)
Dr Morwenna Opie-Moran
Michaela Nuttall RN
Chloe Smerklo

Charity Secretary:

Joanne Bullingham

Charity Administrator:

Denise Chapman

Medical advisors:

Dr Nick Gall

Dr Arnold Deering
Dr Satish Raj
Dr Blair Grubb
Dr Ian Wilkinson
Dr Jane Simmonds
Melloney Ferrar
Helen Eftekhari
Prof Melvin D Lobo
Dr Sam Waterman
Dr Robert Sheldon

Medical patrons and supporters:

Dr Nick Gall
Prof Michael Gammage
Cat Smith MP
Dr Philip Hammond
Adam Jacobs
Peter Capaldi

Primary Bankers:

NatWest Bank



Independent examiner:

Michael Brown
Sobell Rhodes LLP
The Kinetic Centre
Theobald Street
Elstree
Hertfordshire
WD6 4PJ



Our Mission, Vision, and Values

PoTS UK supports and educates patients, family, friends, and healthcare professionals within the United Kingdom about this under recognised and commonly misdiagnosed condition by sharing up to date evidence and resources. We work with healthcare professionals and other charities in the UK and abroad, and advocate for our members by seeking better NHS services, more research, and targeted treatments for people with PoTS. We aim to connect patients in a safe environment to empower them to self-manage their condition and reduce isolation. We produce evidence-based educational content for healthcare professionals which will improve awareness of PoTS, diagnosis, and management, and improve health services for patients.

PoTS UK began as a Facebook group in 2010, and until 2015 all the work was undertaken by three volunteer trustees. Since then, we have grown into an internationally recognised Charity. Our Charity supports all ages, genders, and ethnicities.

Mission: To provide accessible evidence informed support, education, and awareness for our growing community.

Vision: To optimise the health and quality of life of everyone impacted by PoTS.

Values:

We are COMMITTED to supporting the PoTS community by:

- Ensuring PoTS is universally known.
- Promoting fair and equitable access to healthcare.
- Facilitating ongoing advancement of our understanding of the condition and its management.
- Providing trusted and evidence informed resources.
- Challenging ourselves to be more inclusive, sustainable, and connected.
- Leading the change for a compassionate and open mindset.
- Collaborating with others who share our ambitions.

To achieve our mission, vision and values, our activities include:

- Educating individuals and groups of medical professionals.
- Providing evidenced based information in the form of a website – accredited by Patient Information Forum.
- Creating and distributing leaflets suitable for patient and medical professionals.
- Encouraging and engaging in journal publications and research.
- Producing newsletters for members.
- Encouraging accurate media coverage.
- Offering regular educational webinars (recorded and published on our YouTube channel).
- Providing online peer support groups.
- Using social media platforms to offer support, educate and raise awareness.
- Full details are available from our website www.potsuk.org



Structure, Governance, and Management

PoTS UK is a Charitable Incorporated Organisation as of January 2015, constituted from that date and is governed by the Charity's constitution.

The Charity is run by five trustees who are a mixture of healthcare professionals, patients and carers of people affected by PoTS. Trustees are elected by mutual agreement by all other trustees and remain in post for a minimum of three years. The trustees aim to have one or two face-to-face meetings a year and a monthly meeting via Zoom. The board also utilise email, WhatsApp and video calls as other forms of communication when required.

There are a range of skills within the board members from events management to risk assessment, governance, and financial management. These valuable skillsets are called upon throughout the year for varying requirements from governance measures development to planning awareness day events.

The Charity does not have an onsite office, however, utilises the Charity's secretary address for all correspondence due to the convenience of coordinating all communication and operations.

The Charity has two paid staff both working on a part time basis, these resources are to enable coverage of the Charity administrative and operational needs.

Public benefit statement

The trustees identify the need to have charitable aims and objectives to comply with the Charity commission's public benefit guidance.



Significant Activities

The charity was delighted to secure funding of £18,000 from NHS England to run an educational training event for healthcare professionals on PoTS and Long-Covid (also called a Masterclass on PoTS and Long-Covid). This was the largest event the charity has ever held. Up to 100 people registered to attend in person and over 1000 people registered to attend virtually. The lectures were recorded and added to the Charity's YouTube channel and have since acquired over 1600 views. We are grateful to Mast Cell Action who also contributed £1000 to the event. This funding was sought through the charities contacts and work with the NHS, although this was a one off grant the charity has canvassed since the Masterclass to ascertain if continued funding was available, unfortunately this was not the case.

PoTS UK remain thankful to the fantastic community that supports the Charity and who continue to fundraise throughout the year. There were 20 fundraising pages set up on JustGiving during the year raising £27,866.12. A couple of fundraising events were held by supporters, in particular a PoTS Ball with over 200 guests and several sporting challenges like the Edinburgh Marathon saw some of the most significant donations.

Since the online Peer Support Groups started in January 2021, the charity has run 230 sessions and have had 3,169 people register in attendance. This shows the demand and enthusiasm for these groups with attendees returning month after month. At least ten separate support groups are held per month, predominantly split by region; but the charity also host a group for those who are newly diagnosed, a group for parents and carers, an afternoon session and more recently, a group for 13–17-year-olds. The volunteers meet Bi-monthly to review progress, feedback and discuss any changes needing to be implemented. This is an area the charity plan to continue to grow and invest time and resources in over the next year.

PoTS UK have commissioned a PoTS app that offers expert advice and also allows patients to track/monitor their symptoms along with comments so they can analyse trends and triggers. The potential benefits of this app will be to reduce the strength of self-criticism and associated negative emotions (including any anger, guilt or shame). Additionally, it may help to improve autonomic balance and function by activating soothing body systems and parasympathetic activity. The development has been considerably slower than anticipated since the project was initiated, however beta testing was completed in summer 2023. There is further work needed to be completed and tested to ensure the app is a useful product for patients on an ongoing basis. The app will remain a work in progress, and PoTS UK will continue to develop the functionalities of it post launch.

Financial review

Activity during 2022-2023, has seen a steady stream of donations and grants totalling £68,725, keeping the reserves at a sustainable level ensuring PoTS UK's core activity can continue during this period.

The year started with the Charity's bank account with NatWest having an opening balance of £79,423, and then closing off the 2022 – 2023 financial year balance with £86,897.

Reserves Policy

Although the Charity has no restricted reserves or respective policy in the 2022 - 2023 reporting period, this is being finalised and implemented in 2023-2024 on the best course of action for future strategic planning.

The Trustees have adopted a policy that the charity's reserves shall cover necessary costs and commitments during an unforeseen period of difficulty. The Trustees aim to maintain or hold the level of reserves equivalent to three months of expenditure with additional funds for legal costs, staff sickness and future activities.

The outlook for PoTS UK remains positive and careful management of funds will ensure that the Charity remains in a healthy position.

Operating Review

PoTS UK continue to receive a monthly payment via PayPal Giving which comes from a range of sources including Facebook, GoFundMe and PayPal itself. The Charity also utilises JustGiving as its main fundraising platform and received £27,866 in 2022-2023. PoTS UK is signed up to AmazonSmile, Don'tSendMeACard and text donations.

Our merchandise is proving popular and is great for raising funds and awareness. In this reporting period, the charity have had gross sales of £5,744.

Additional funding is provided from the Charity merchandise via the Charity's website. New merchandise such as the FlipStick, a mobile device to assist with walking and converts into a portable seat, provides a steady income.

Other main expenditure has been on:

- Administration support.
- Continuous management and maintenance of the online peer support groups.
- Development of the PoTS App.
- Software licence for Zoom to allow the Charity to provide educational webinars for larger numbers of medical professionals and patients.
- Travel expenses for trustees, volunteers, and others who assist in pursuing the aims of the Charity.
- Website maintenance and mailing system.

PoTS UK continue to work tirelessly to ensure the Charity achieves its objectives, manage and governs the charity activities in line with the Charity's vision and values, these activities include but limited to: responding to email queries from patients, carers and healthcare professionals; provide training and awareness on the PoTS condition to requested parties, campaign for better services and care for patients; provide assistance to patients and carers through the Peer Support Groups; and advocate for PoTS.



Report Approval

The PoTS UK Trustee Report for 2022-2023 was approved by the board on 08/02/2024.

The report was signed on behalf of the trustees by:

A handwritten signature in black ink, appearing to be "LK", written over a horizontal line.

Professor Lesley Kavi, Trustee and Chair, PoTS UK.

Date: 08 February, 2024.



Receipts and payments accounts

CC16a

For the period from	Period start date 06/04/2022	To	Period end date 05/04/2023
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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 £
A1 Receipts					
Donations	50,725	-	-	50,725	51,487
Sales of merchandise	2,635	-	-	2,635	9,463
Grant for wages	-	-	-	-	6,147
Bank interest	-	-	-	-	684
Retreat ticket sales	-	-	-	-	3,056
Grant to fund Masterclass	18,000	-	-	18,000	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	71,360	-	-	71,360	70,837
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	71,360	-	-	71,360	70,837
A3 Payments					
Printing, postage and stationary	1,004	-	-	1,004	763
Advertising and promotional expenditure	3,747	-	-	3,747	27,743
Wages and salaries	26,790	-	-	26,790	25,995
Computer expenses and consumables	2,448	-	-	2,448	2,485
Cost of providing Retreat	-	-	-	-	9,538
Accountancy fees	2,220	-	-	2,220	2,100
Trustee travelling and other expenses	1,134	-	-	1,134	1,290
Office Supplies	308	-	-	308	493
Training	409	-	-	409	120
Purchase of promotional items	5,983	-	-	5,983	19,325
Insurance	611	-	-	611	393
Legal & professional	-	-	-	-	720
Recruitment	-	-	-	-	150
Research	1,588	-	-	1,588	1,588
Subscriptions	695	-	-	695	764
Just Giving fees	216	-	-	216	108
Cost of providing masterclass	9,883	-	-	9,883	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	57,036	-	-	57,036	93,575
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	57,036	-	-	57,036	93,575
Net of receipts/(payments)	14,325	-	-	14,325	- 22,738
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	80,063	-	-	80,063	102,801
Cash funds this year end	94,388	-	-	94,388	80,063

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 £
B1 Cash funds	Bank accounts	94,388	-	-
		-	-	-
		-	-	-
	Total cash funds	94,388	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK


Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	Lisa Bradford	08/02/2024



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
PoTS UK

**On accounts for the year
ended**

5 April 2023

**Charity no
(if any)**

1159813

Set out on pages

1 and 2

(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 **05/04/2023**.

**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:

09/02/2024

Name:

MICHAEL BROWN

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

ACCA

Address:

SOBELL RHODES LLP

CHARTERED ACCOUNTANTS

THE KINETIC CENTRE
THEOBALD STREET
ELSTREE
HERTFORDSHIRE
WD6 4PJ

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.

POTS UK

England & Wales - Charity number 1159813

Accounts

PoTS UK Trustees Annual Report

6th April 2021- 5th April 2022

Name of the charity: PoTS UK.

Registration number: 1159813, Charitable Incorporated organisation (from 6 Jan 2015).

Address: Oakfield Cottage, Stratford Rd, Wootton Wawen, Henley-in-Arden B95 6DF.

Trustees:

Dr Lesley Kavi (Chair)

Dr Morwenna Ople-Moran

Mrs Michaela Nuttall RN

Mrs Naomi Stetson RN (Treasurer) (resigned 1st November 2021)

Miss Chloe Garner (appointed May 2021)

Ms Lisa Bradford (Treasurer) (appointed August 2021)

Charity Secretary:

Joanne Bullingham

Charity Administrator:

Azura Farrell-Mcleod (six-month placement from May-Nov 2021)

Denise Chapman (appointed May 2022)

Medical advisors:

Prof Julia Newton

Dr Arnold Deering

Dr Satish Raj

Dr Blair Grubb

Dr Ian Wilkinson

Dr Jane Simmonds

Melloney Ferrar

Helen Eftekhari

Prof Melvin D Lobo

Medical patrons and supporters:

Prof Michael Gammage

Dr Nick Gall

Cat Smith MP

Dr Phillip Hammond

Adam Jacobs

Peter Capaldi

Primary Bankers:

NatWest Bank

Independent examiner:

Martin I May Chartered Accountant
Sobell Rhodes LLP
The Kinetic Centre
Theobald Street
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Our Mission, Vision and Values

PoTS UK supports and educates patients, family, friends and healthcare professionals within the United Kingdom about this under recognised and commonly misdiagnosed condition by sharing up to date evidence and resources. We work with healthcare professionals and other charities in the UK and abroad, and advocate for our members by seeking better NHS services, more research, and targeted treatments for people with PoTS. We aim to connect patients in a safe environment to empower them to self-manage their condition and reduce isolation. We produce evidence-based educational content for healthcare professionals which will improve awareness of PoTS, diagnosis and management, and improve health services for patients.

PoTS UK began as a Facebook group in 2010, and until 2015 all the work was undertaken by three volunteer trustees. Since then, we have grown into an internationally recognised charity. Our charity supports all ages, genders, and ethnicities.

Mission: To provide accessible evidence informed support, education, and awareness for our growing community.

Vision: To optimise the health and quality of life of everyone impacted by PoTS.

Values:

We are COMMITTED to supporting the PoTS community by:

- Ensuring PoTS is universally known.
- Promoting fair and equitable access to healthcare.
- Facilitating ongoing advancement of our understanding of the condition and its management.
- Providing trusted and evidence informed resources.
- Challenging ourselves to be more inclusive, sustainable, and connected.
- Leading the change for a compassionate and open mindset.
- Collaborating with others who share our ambitions.

To achieve our mission, vision and values, our activities include:

- Educating individuals and groups of medical professionals.
- Providing evidenced based information in the form of a website – accredited by Patient Information Forum.
- Creating and distributing leaflets suitable for patient and medical professionals.
- Encouraging and engaging in journal publications and research.
- Producing newsletters for members.
- Encouraging accurate media coverage.
- Offering regular educational webinars (recorded and published on our YouTube channel).
- Providing online peer support groups.
- Using social media platforms to offer support, educate and raise awareness
- Full details are available from our website www.potsuk.org

We have continued to use our newfound confidence in online/virtual offerings to manage these objectives. Our Zoom account has been well utilised to allow us to meet with people safely and ensure raising awareness doesn't need to stop as a result of social distancing – a problem that persisted throughout the year to varying degrees. 2021/22 has seen our first hybrid patient event and we strongly suspect this will become business as usual for future events as it opens the door for so many more people to attend. The PoTS UK team are proud of the way they have continued to manage the difficulties imposed by the pandemic and feel more resilient and better able to work remotely in all areas.

Structure, governance, and management

PoTS UK is a Charitable Incorporated Organisation as of January 2015, constituted from that date.

The charity is run by five trustees who are a mixture of healthcare professionals, patients and carers of people affected by PoTS. Trustees are elected by mutual agreement by all other trustees and remain in post for a minimum of three years. The trustees aim to have one or two face-to-face meetings a year and a monthly meeting via Zoom. They also use email, WhatsApp and video calls when needed. Whilst we were sad to say goodbye to our treasurer Naomi Stetson, we have been delighted to welcome Chloe Garner and Lisa Bradford (Treasurer) as new trustees. They have a range of fantastic skills from events management to risk assessment, governance and financial management. The charity has no office, but appointed a paid, self-employed Charity Secretary in December 2018. The same person became the charity's first salaried employee on 1st January 2021 and remains in post. As part of a Department for Work and Pensions funded scheme, a fully funded part-time member of staff was appointed for six months from May-November 2021. This extra support was of great benefit to the charity and the charity provided training and work experience to the employee. The charity has recently appointed an additional member of staff on a self-employed basis due to the increasing workload and to cover maternity leave for nine months from August 2022.

Public benefit statement

The trustees identify the need to have charitable aims and objectives to comply with the charity commission's public benefit guidance.

Policy on reserves

Activity during 2021-22, has been a steady stream of incoming funds keeping the reserves at a sustainable level ensuring PoTS UK's core activity can continue during a period of unforeseen difficulty.

The reserves were reviewed at the end of 2021 as part of the handover process and a new strategy was developed, including regular reporting and updates to the board and the Chair. At the beginning of 2022, through the planning and management for the year ahead it was decided due to resourcing challenges, further resources would be acquired to support the running of the charity and therefore no large or major events will take place in 2022 (unless funded via grants). Existing budgeted projects will be supported.

The outlook for PoTS UK remains positive and careful management of funds will continue to be essential to ensure the charity remains in a healthy position. PoTS UK will continue to promote different ways people can support the charity, including those that don't cost them any money such as donations through online shopping.

Although the charity currently has no restricted reserves, this will be discussed with the accountant to formulate a plan on the best course of action for future strategic planning.

Financial review

After a difficult year, the lift in Covid restrictions (periodically) allowed fundraising to commence and we saw an increased appetite in organising large fundraising events. Thank you especially to Anne Smith and Francesca Foxcroft who raised substantial amounts for PoTS UK. Combined with a large one-off donation from a regular donor, we saw record income during 2021/22. We also received two large separate contributions that were used to make the PoTS textbook more accessible for patients to purchase. Other fundraising activities carried out by members included cake sales, sponsored dances and a variety of impressive sporting events.

The third PoTS National Awareness Day was held on 25th October 2021 and saw increased fundraising efforts with repeated initiatives such as 'Par-tea for PoTS' and the '30 ways to get involved' in a challenge. We were finally able to run our twice postponed PoTS retreat for patients on 24th October and this coincided nicely with the Awareness Day. The cost to patients of attending the Retreat was heavily subsidised by PoTS UK to make it more affordable for all.

PoTS UK continue to receive a monthly payment via PayPal Giving which comes from a range of sources including: Facebook, GoFundMe and PayPal itself. VirginMoneyGiving closed in November 2021 and the charity registered with JustGiving as our new main fundraising platform. PoTS UK is signed up to AmazonSmile, Don'tSendMeACard and text donations and receives a small, but increasing amount through these channels, particularly AmazonSmile.

In May 2021, the PoTS UK team decided to lead by example and took on their own fundraising challenge. In conjunction with the CaptainTom100 challenge, our team cycled, swam, ran and walked 100km over the 4-day challenge period and raised over £1000. We continue to receive a steady stream of small donations from members and their families. Our 'Donate' button on the new website has encouraged further donations, especially as people can easily add a donation when purchasing merchandise. We are very grateful for every contribution.

In line with our new branding and website, revealed on 25th October, new merchandise was purchased and this provides a steady income.

Other main expenditure has been on:

- Development and roll out of our new website
- Development of our new logo/branding
- Setting up online peer support groups
- Engaging the services of a PR company, Chamberlain Dunn
- Development of the PoTS App
- Software licence for Zoom to allow us to provide educational webinars for larger numbers of medical professionals and patients
- Travel expenses for trustees, volunteers, and others who assist in pursuing the aims of the charity
- Website maintenance and mailing system
- Administration support

Financial Planning

The charity's expenditure reached its highest ever in 2020/21. Firstly, the pandemic prevented lots of plans in 2019/20 so we anticipated it being a more costly year as we rolled out the delayed projects. In addition, as the charity was showing exponential growth, the trustees felt it was the right time to re-brand, commission a new website and invest in PR support - all of which were costly. The patient retreat was another main area of expense but was very well received and for the first time ever, we offered this as a hybrid event to ensure everyone was able to participate.

Risk assessment

Risks are assessed on an annual basis

Risks identified –

Covid-19 continues to cause disruption to all and the charity remains mindful of the impact this could have on the health of our members (and the need for extra support/additional enquiries), fundraising and events.

Legal support for ad hoc advice is necessary. As several issues requiring legal advice arose during 2020/21, the charity have instructed the services of Wright Hassall when required.

At the beginning of 2022 a review of the charity's financial status was reviewed through the planning and management for the year ahead. It was decided due to resourcing challenges, further resources would be acquired to support the running of the charity and therefore no large or major events will take place in 2022 (unless funded via grants). However, existing budgeted projects will be supported.

Merchandise can easily be copied which would impact upon our potential income from this revenue. As a result, it was agreed to produce a more distinctive logo and re-brand and this was launched in October 2021.

Achievements and performance

PoTS UK membership has grown to over 5250 registered members, 300 healthcare professional members and over 16,000 Facebook followers. This is an incredible increase and highlights the increase in the number of people with PoTS as a result of long-covid and raised awareness.

Raising awareness

For our third awareness day, we were delighted to see a huge number of buildings light up purple in support of PoTS UK and to raise awareness of PoTS. We reached out to our community in order to achieve this and they did not disappoint. It was wonderful to see so many photos on Awareness Day and we hope to make this an even bigger part of Awareness Day 2022.

Across the country, members hosted their own 'Par-tea for PoTS' and cake sales along with a plethora of other creative fundraising events including a ticketed Halloween party.

Chair of PoTS UK, Prof Kavi and a patient were asked to present via Zoom for Octopus energy's disability awareness week. As a thank you, they kindly donated £1000. This was an excellent opportunity to share information with people who have never heard of PoTS and was wonderful to see an employer take strides in showing their support for their employees with disabilities.

PR Company – From May to September, we worked closely with PR company Chamberlain Dunn. The increased spotlight on PoTS as a result of Covid seemed like the perfect opportunity to invest financial resource in acquiring some expert skills in reaching a wider audience.

A large number of resources were developed with their support and generated record levels of engagement on social media. The biggest success in terms of reach was an article in the Mail on Sunday that was then duplicated by many other national newspapers. Whilst the headline was disappointing and somewhat trivialising, the content was good and their readership figures are vast:

<https://www.dailymail.co.uk/health/article-10075495/Could-Long-Covid-little-known-nervous-problem.html>

We have also been contacted by other papers and would like to thank our community for being brave enough to speak out to the media. Some examples are below:

<https://www.yorkpress.co.uk/news/19866514.student-reveals-struck-illness-similar-long-covid/>

<https://www.bbc.co.uk/news/uk-wales-60287344>

Online Peer Support Groups

In October 2021, five pilot peer support groups were held. These were a fantastic success and as a result, a plan was put in place to launch these from January 2022. Each month, ten separate groups are held. These are predominantly split by region, but we also host a group for those who are newly diagnosed, a group for parents and carers, an afternoon session and more recently, a group for 13–17-year-olds. The volunteers meet monthly to review progress, feedback and discuss any changes we may wish to make.

In the future, with further volunteers, we hope to run adhoc sessions on specific topics (e.g. – Employment and PoTS, Pregnancy and PoTS and a Men only group).

All volunteers are required to complete our application form, provide two references, undergo DBS checks and complete safeguarding and other training.

We continue to develop the training on offer and have plans for training on transgender health and terminology later this year.

Website

Our website and mailing system are two of our main platforms for providing information and we continued to send newsletters and updates in 2021/22 to our medical and patient members.

In October 2021, in line with our new website, we moved our mailing system over to Mail Chimp.

The feedback about the new website has been extremely positive and we continue to strive to add more useful information. We can see from analytics that our website is accessed from all over the world and consequently added google translate as a functionality to ensure as many people as possible can benefit from our information. We have also added a 'Rate this page' function and hope to spend some time in 2022/23 doing more detailed analysis of what information is being utilised the most. This will help pave the way for further development.

The Patient Information Forum (PIF)

PoTS UK signed up to The Patient Information Forum (PIF) in May 2020 and were awarded their kitemark following a successful review in June 2020. The charity is assessed annually and met the required standards with ease at the 2021 assessment. There are just two outstanding documents requiring updating as of July 2022. We are proud to have updated our 16-page information booklet. Thank you to Lorna Nicholson for her continued support and work in her role as Information Production Manager. As standard practice, our target audience is consulted ahead of any new information production to ensure it is as useful as possible for the end user. In addition to reviewing the existing content, PoTS UK are proud to have added several new pages this year, including 'Bladder and PoTS' and an enhanced version of our diagnosis and living with low blood pressure pages.

Social Media

The PoTS UK Facebook page continues to thrive and engagement is increasing all of the time. We have introduced 'Questions in confidence' to allow members to ask questions confidentially and seek input from their peers. Comments are monitored by PoTS UK to

ensure they are evidence based, appropriate and accurate. The charity would like to improve on consistency and visual appeal of the posts and hope the appointment of the new member of staff will provide this based on their experience and skills. Twitter has seen an increase of over 2000 followers in the last year (now 5802) and Instagram has seen a further 1500 followers in the last years (now at 3672). Increased volunteer support with these platforms has been a great asset and we are reaching a wider community now. We also use LinkedIn and currently have 410 followers. We aim to adapt our posts to suit the different audiences that these platforms have and continue to work on improving the way in which we disseminate information.

YouTube Channel

In February 2020, we launched our PoTS UK YouTube channel as a way of easily sharing both the 2019 London PoTS Masterclass videos and the monthly patient focussed webinars. This channel has now doubled in the number of subscribers in the last year and now has 1770. We regularly add to our channel and share videos intermittently throughout the year on our different social media platforms. Our 'What is PoTS?' video has nearly had 10,000 views and continues to be shared widely within our community.

National Lottery Grant Application

In April 2021, PoTS UK submitted their first, large scale grant application to the National Lottery Reaching Communities Fund. Sadly, we found out in November 2021 that we were unsuccessful with our application. We were told that it was one of several which were recommended for funding, but ultimately not prioritised by the panel for the limited amount of funding available. The panel explained they could see PoTS UK has strong credibility in the voluntary and health sectors and that the project was well planned, but sadly their funding for 2021/22 was very limited compared to previous years. Whilst this is disappointing, we are pleased our proposal was recommended for funding and can use this application with confidence as a framework when applying for other grants in the future.

Merchandise

Our merchandise is proving popular and is great for raising funds and awareness. To date, we have had gross sales of £9,087.07.

Working with other Charities

We have been pleased to collaborate with EDS Support UK, Mast Cell Action, HMSA and the Arrhythmia Alliance. EDS Support UK provided invaluable help and advice when we were in the process of setting up our online peer support groups for which we are extremely grateful.

Volunteers

Our volunteer network has thrived over the last 12 months and in addition to our long-standing volunteers, we now have an additional 20 peer support volunteers who have worked collaboratively with us from the outset of setting the groups up. They are committed and passionate and we feel privileged to welcome them to our team.

Quarterly review meetings are also held with our other volunteers to keep them updated on latest charity news and invite their feedback and suggestions. Working parties are now regularly set up for different projects and the input from volunteers has proved invaluable.

Thank you to everyone who has supported PoTS UK this year; especially Melloney Ferrar who answers the Support mailbox queries; Lorna Nicholson who supports the website review and Louise Thompson and Rachel Carlisle who have played a huge part in the setting up of the online peer support groups. A special thank you also to Michelle Orris and Sarah Fender for their work with our social media platforms.

Stories

We are always very happy to share patients' stories and know that this is a well utilised area of our website. A new Initiative for sharing stories was launched in March 2022. Over the coming months, we will ask patients to share their stories via video and we hope to be able to convert these as podcasts also. The pilot was filmed in March with one volunteer 'interviewing' a patient. It is due to be shared soon and providing it is well received and deemed useful, we will continue with this new format in addition to the written stories on our website.

Campaigning to keep clinic open

The clinic at Derriford Hospital in Plymouth helps about 200 patients with Postural Tachycardia Syndrome (PoTS), who rely on specialist services. With the impending retirement of the consultant the hospital planned to close the clinic. As a result of successful campaigning from patients and support from PoTS UK, the clinic has been able to remain open for the time being.

<https://www.bbc.co.uk/news/uk-england-devon-56742712>

Health care professional education and patient events

Teaching

Professor Kavi has continued to present and teach at a range of events, including the Heart Rhythm Congress and a session within a cardiology webinar, designed to increase awareness and knowledge of PoTS. This was later distributed to 100,000 cardiology specialists. She has also developed an open access Syncope Toolkit and e-learning module for the Royal College of GPs, both of which contain information and training on PoTS.

NICE

Professor Kavi was invited to join the NICE expert panel on long-term effects of Covid-19.

Webinars

Monthly webinars (aimed at patients) have continued to be popular since they commenced in April 2020. In the last year, we have added the following to the existing 13 sessions.

PoTS – The basics for those newly diagnosed

Long Covid and the autonomic nervous system – a top down and bottom-up approach

Breathing Pattern Disorders
Pregnancy and PoTS
PoTS UK – Plans for 2022 and how to get involved
Orthostatic Intolerance in young people
How psychology support can be involved in PoTS care

Retreat

The retreat was scheduled 18 months later than originally planned and with persistent challenges as a result of Covid 19, we were thrilled to be able to host the PoTS Retreat for patients in the Cotswolds in October 2021. This was attended by 100 people in person and 100 virtually. The sessions were recorded so people have been able to purchase these after the event which has been popular. It was a wonderful day and a great opportunity for patients to be able to meet one another, share experiences and offer peer support. We are very grateful to the companies who donated products that made up the goodie bags for those attending in person. The cost to patients of attending the Retreat was heavily subsidised by PoTS UK to make it more affordable for all. The feedback from the day was excellent and we were proud to ensure our online attendees felt included throughout the day. This was our first hybrid event and we learnt a lot about live streaming and sound quality that will be very useful for future events. Thank you to Rupal Thakarshi who kindly donated her time to manage the IT on the day and edit the recordings. Thank you also to our fantastic volunteers who helped to ensure this day was a success.

UK PoTS Guidelines

The medical textbook 'Postural Tachycardia Syndrome: a concise and practical guide to management and associated conditions' was published by Springer in October 2020. Due to the considerable generosity of two donors, we were able to purchase 250 copies of this book for a reduced price and sell them (for no profit) to our members. A ballot was held to make it as fair as possible and the demand was considerably higher than anticipated. We have received lots of positive feedback.

PoTS UK Publications

We have distributed hundreds of our PoTS booklets for patients to hospital clinics throughout the UK. We regularly receive requests for further booklets demonstrating that they have proved useful. These booklets have recently been updated.

Educating GPs

Trafford CCG invited the charity to present to over 80 GPs in Trafford - educating them on PoTS and other associated conditions. PoTS UK were joined by Dr Amy Small and Anita Kiernan who kindly agreed to share their stories of what it is like living with PoTS. Both provided such powerful stories that we are sure will stay with the GPs who attended and help improve the services offered. The feedback from this presentation was excellent and has since had a further 650 views on YouTube.

In addition, Professor Kavi has had several opportunities to teach GPs and trainees about PoTS and syncope through a variety of platforms.

Educating Paramedics

Professor Lesley Kavi was invited by Birmingham and Solihull NHS Training Hub to deliver a talk and answer questions on PoTS and Syncope.

Medical News Today's 'In Conversation' podcast

Professor Lesley Kavi was very happy to be asked to join cardiovascular medicine specialist Dr. Artur Fedorowski, Dr. Tae Chung, director of the Johns Hopkins PoTS Program, and Angela Meriquez Vázquez, COVID-19 long hauler and Body Politic president to talk about Covid and non-covid PoTS.

University Courses

In addition to the above, Professor Kavi has taught students about PoTS at various universities on a range of courses.

Journal Library

A nurse volunteer kindly keeps the journal library up to date.

Primary Care – Issues and Answers

We have partnered with Primary Care Issues and Answers, a unique new digital learning platform for the community of healthcare professionals who deal with millions of patients in primary care.

Research and Academic Publications

NICE Guidelines

As a stakeholder in the long covid and ME/CFS NICE guidelines PoTS UK had opportunities to represent patients and provide feedback.

The British Journal of Cardiology

Drs Gall and Kavi published a paper describing a series of patients who developed PoTS following long covid in January 2022. It was the largest case series from the UK at the time, and among the largest in the world, detailing the clinical characteristics of patients affected with PoTS developing after a COVID-19 infection.

In March 2022, the charity was invited to write an editorial for The British of Journal of Cardiology. Trustees, Dr Morwenna Ople-Moran and Mrs Michaela Nuttall wrote a powerful article that was very well received. It was titled 'Pipedreams, the pandemic and PoTS: is the post-COVID-19 era a turning point for PoTS services?' and can be viewed here:

<https://bjcardio.co.uk/2022/03/pipedreams-the-pandemic-and-pots-is-the-post-covid-19-era-a-turning-point-for-pots-services/>

British Journal of General Practice

Prof Kavi was invited to write an editorial on PoTS by the British Journal of General Practice – the leading journal read by GPs in the UK and one of the most popular in the world. The paper was tweeted over 2000 times by Twitter users. Altmetric Attention Score is an academic tool that monitors the attention received by academic journal publications and this BJGP paper was among the top 5%.

Supporting Medical Research

PoTS UK continue to support a number of research projects, especially by assisting with recruitment of patients and advising researchers.

PoTS Live (ongoing from 2019/20) – PoTS UK was delighted to support this research and helped recruit participants for the study. The project aims to explore what it is like living with PoTS on a day-to-day basis, for individuals who have PoTS and also for their families or partners. By sharing experience, the hope is that it will help other people with PoTS and healthcare professionals (doctors and nurses) to better understand the condition and the types of support that are needed. Origins Insights (<https://origins-insights.com/>), a health experience research company is organising and running the project in collaboration with PoTS UK. Participants were asked to film themselves for about five to ten minutes each day, for the duration of the project, using an app on their phone.

This research was published in November:

<https://journals.sagepub.com/doi/10.1177/17423953211054032>

PoTS UK are delighted to have welcomed lead researcher, Dr Samantha Waterman to our team of medical advisors.

PULSE study (ongoing from 2019/20)

A team of people from Coventry University PoTS UK, UHCW, UCL and Warwick University were awarded British Heart Foundation funding to co-create (develop with significant input from patients) a feasibility trial of a physical activity programme for people with PoTS. The grant application was developed with PoTS UK, people affected by PoTS, and healthcare professionals. The project is now well underway. Some aspects had to be adapted to be delivered remotely due to covid.

<http://pulse-project.coventry.ac.uk/>

Other research projects

PoTS UK have supported a further five research projects and we look forward to seeing the results of these studies in 2022/23. We would like to thank all the patients and families who responded to these requests.

Supporting parents and patients

PoTS UK continues to answer a large number of email enquiries from patients and family members/carers/friends and there has been a considerable increase in the number of enquiries since Covid-19. We also receive and answer enquiries from teachers, healthcare

professionals and professionals from other disciplines who require advice and guidance in order to better support their clients with PoTS.

We continue to offer regular educational webinars as described above. We regularly seek feedback on topics of interest and try to tailor the webinars to meet the needs of our community.

The roll out of our online peer support groups has become a valuable resource to many and we hope this will continue to grow over time.

PoTS UK have commissioned a PoTS app that offers expert advice and also allows patients to track/monitor their symptoms along with comments so they can analyse trends and triggers. The development has been considerably slower than anticipated when this project first started, but we are now confident it will be fully rolled out by Autumn 2022. The potential benefits of this app will be to reduce the strength of self-criticism and associated negative emotions (including any anger, guilt or shame). Additionally, it may help to improve autonomic balance and function by activating soothing body systems and parasympathetic activity. It might also help with the development of courage for self-care tasks which may help improve sleep and fatigue and engagement and quality of life. The app will remain a work in progress, and we hope to continue to develop the functionalities of it post launch.

Services for patients

We continue to maintain an on-line register of NHS consultants with an interest in managing patients with PoTS. We regularly ask our members for updates on this via social media so we can keep it as up to date as possible.

We continue to lobby for better patient services for affected people. We have contacted NHS England, government officials and various hospital trusts about the need to improve access to healthcare for affected patients. Our new patron, Cat Smith MP is also keen to raise awareness and put PoTS in the spotlight at any suitable opportunities.

We send monthly newsletters with up-to-date information. We encourage patients to write to their local GPs, CCGs and MPs etc to raise awareness and have provided template letters to make this task easier.

Goals for next year and the future

Patient/Parent support

- To pilot, release and develop the new PoTS App
- Continue to hold monthly webinars on a range of topics associated with PoTS
- Continue to run virtual support groups and increase the number of attendees and volunteers
- To plan a family event suitable for all ages
- To further develop remote and hybrid events

- To provide a range of activities that people can get involved with over Dysautonomia Awareness Month/Awareness Day
- To begin planning the next Patient Retreat – to take place late 2023
- To repeat the Jan 2021 charity survey to ensure we are meeting the needs of our patients and seek areas for Improvement

Medical professional awareness

- To further raise awareness of PoTS amongst GPs
- To host the Long Covid and PoTS Masterclass on 1st July 2022
- To encourage contributions from overseas experts via the Visiting Speaker Fund and conference programming

Research

- To support international and local research initiatives
- Continue to support PULSE Co-Creation physical activity programme
- To roll out the Power to PoTS Survey and encourage record participation
 - supported by researchers at Coventry University (incorporating Covid-19 Impact)

Access to care

- To develop ideal patient pathways and patient-centred multi-disciplinary treatment approaches
- To set up a working party to service models, commissioning, and access to NHS care
- Continue to work towards improved access to care for all patients throughout the UK

Charity Development

- To continue to develop and implement Communications Strategy, particularly within our social media platforms
- Ongoing review of charity structure and governance
- To provide further training to Trustees and charity secretary and administrator
- To continue to develop our volunteer framework
- Organise training for PoTS UK staff, trustees and volunteers on Equality and Diversity
- To continue to review PoTS UK's strategic development at our AGM in November

2021/22 year has been an exceptionally busy but rewarding year for the charity with considerable steps forward taken in terms of developing the charity and raising awareness about PoTS.

Looking ahead to 2022/23, we hope to capitalise on all of the opportunities the last year has presented us with and sincerely hope to see an improvement in services offered to people with PoTS.

We will continue to work tirelessly to ensure we achieve our objectives.

Signed on behalf of the trustees by Prof Lesley Kavi, Trustee and Chair, PoTS UK

Date: 12th DECEMBER 2022.

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 £
B1 Cash funds	Current account	80,063	-	-
		-	-	-
		-	-	-
	Total cash funds	80,063		

(agree balances with receipts and payments account(s))


Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature 	Print Name L. BRADFORD	Date of approval 16/01/2025
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Section A Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
PoTS UK

**On accounts for the year
ended**

5 April 2022 **Charity no
(if any)** 1159813

Set out on pages

1 and 2
(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 03/04/2021.

**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: 17.1.2023

Name: MARTIN MAY

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

ICAEW

Address:

SOBELL RHODES LLP
CHARTERED ACCOUNTANTS
THE KINETIC CENTRE
THEOBALD STREET
ELSTREE
HERTFORDSHIRE
WD6 4PJ

Section B Disclosure

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.

POTS UK

England & Wales - Charity number 1159813

Accounts

PoTS UK Trustees Annual Report
6th April 2020 - 5th April 2021

Name of the charity: PoTS UK

Registration number: 1159813, Charitable incorporated organisation (from 6 Jan 2015)

Address: Oakfield Cottage, Stratford Rd, Wootton Wawen, Henley-in-Arden
B95 6DF

Trustees:

Dr Lesley Kavi (Chair)

Dr Morwenna Opie-Moran

Mrs Michaela Nuttall RN

Mrs Naomi Stetson RN (resigned 1st November 2021)

Miss Vicky Nash (resigned 1st February 2021)

Miss Chloe Garner (appointed May 2021)

Miss Lisa Bradford (appointed August 2021)

Charity Secretary:

Joanne Bullingham

Medical advisors:

Prof Julia Newton

Dr Arnold Deering

Dr Satish Raj

Dr Blair Grubb

Dr Ian Wilkinson

Dr Jane Simmonds

Melloney Ferrar

Helen Eftekhari (joined July 2020)

Prof Melvin D Lobo (joined Feb 2021)

Medical patrons and supporters

Prof Michael Gammage

Dr Nick Gall

Cat Smith MP (joined January 2021)

Dr Philip Hammond

Adam Jacobs

Peter Capaldi

Primary Bankers:

NatWest Bank
HSBC Sheffield

Independent examiner

Martin I May Chartered Accountant
Sobell Rhodes LLP
The Kinetic Centre
Theobald Street
Elstree
Hertfordshire
WD6 4PJ

Objectives and Activities

- To raise awareness, educate and advise medical professionals of this disabling, under-recognised and misdiagnosed health condition, Postural Tachycardia Syndrome (PoTS)
- To offer support and information to patients, family and friends
- To provide up to date evidence-based resources.
- To promote research into PoTS to help gain a greater understanding of the condition so best treatment and management can be adopted.
- To collaborate with other organisations and charities with the same purpose

To meet these aims, our activities include:

- Speaking to individual and groups of medical professionals
- Providing evidenced based information in the form of a website
- Creating and distributing leaflets suitable for patient and medical professionals
- Encouraging and engaging in journal publications and research
- Producing newsletters for members
- Encouraging accurate media coverage
- Offering regular webinars (recorded and published on our YouTube channel)

Full details are available from our website www.potsuk.org

Due to Covid-19, our approach to managing these objectives has required greater use of technology to allow for more online meetings rather than face to face. Our Zoom account has been well utilised to allow us to meet with people safely and ensure raising awareness doesn't need to stop as a result of social distancing. The PoTS UK team are proud of the way they have managed the difficulties imposed by the pandemic and feel more resilient and better able to work remotely in all areas.

Structure, governance and management

PoTS UK is a charitable Incorporated Organisation as of January 2015, constituted from that date.

The charity is run by 5 trustees who are either healthcare professionals, patients or carers of people affected by PoTS. Trustees are elected by mutual agreement by all other trustees and remain in post for a minimum of three years. The trustees aim to have one or two face-to-face meetings a year and a monthly meeting via Zoom. They also use email, WhatsApp and video calls when needed. Trustee, Vicky Nash resigned from her post in February 2021.

The charity has no office but appointed a paid, self-employed Charity Secretary in December 2018. The same person became the charity's first salaried employee on 1st January 2021.

Public benefit statement

The trustees identify the need to have charitable aims and objectives to comply with the charity commission's public benefit guidance.

Policy on reserves

Reserves are maintained at a level which ensures that PoTS UK's core activity can continue during a period of unforeseen difficulty.

When we reviewed our reserves at the start of the Covid-19 pandemic, we did not foresee any major concerns for the charity financially. We considered incoming funds were likely to reduce however staff costs remained low and outgoings manageable within current funds. It was necessary to reduce some activities due to government covid related guidance, and this postponed expenditure on these activities. The outlook for PoTS UK remains positive and careful management of funds will continue to be essential to

ensure the charity remain in a healthy position. Donations have gradually increased again more recently. PoTS UK will continue to promote different ways people can support the charity, including those that don't cost them any money such as donations through online shopping.

We have no restricted reserves.

Financial review

As expected, due to Covid-19, total income was almost £10,000 lower than 2019/20 but we continue to be extremely grateful for the hard work and effort people put into their fundraising efforts. We have highlighted these on social media when possible.

Monies have been received through fundraising activities carried out by members and include cake sales, sponsored dances, pottery auction, sporting events, and a sponsored head shave. The second PoTS National Awareness Day was held on 25th October 2020 and saw increased fundraising efforts with repeated initiatives such as 'Par-tea for PoTS' and the 30-day #PoTSUK Challenge. We were unable to hold an event in person like we did in 2019 due to Covid-19. Despite this, for a second year, there was a considerable increase in the funds received during October and November which supports the importance of the awareness day campaigns. PoTS UK continue to receive a monthly payment via PayPal Giving which comes from a range of sources including Facebook, GoFundMe and PayPal itself. VirginMoneyGiving continues to be used by lots of our members for online fundraising. PoTS UK is now signed up to AmazonSmile, Don'tSendMeACard and text donations and receives a small but increasing amount through these channels.

We have continued to receive a steady stream of small donations from members and their families. We are very grateful for every contribution. We had one large donation this year which will contribute greatly to the costs of the retreat in October 2021 and two large separate contributions that will be used to make the PoTS textbook more accessible for patients to purchase. Throughout 2020, sales of merchandise remained steady although we did stop selling between April and September due to Covid-19.

Other main expenditure has been on

- Development of the Compassionate Mind App
- Software licence for Zoom to allow us to provide educational webinars for larger numbers of medical professionals and patients
- The professional production of our 'What is PoTS?' video
- Travel expenses for trustees, volunteers, and others who assist in pursuing the aims of the charity
- Website maintenance and mailing system
- Administration support

Financial Planning

The charity's outgoings were noticeably less than 2019/20 as events that would usually use take place had to be rescheduled due to the pandemic.

The charity anticipates some large costs next year including re-branding, a new and improved website, patient retreat, education events for healthcare professionals and the roll out of virtual support groups. At the very end of the year, PoTS UK submitted an application for funding from the National Lottery to support these activities.

Risk assessment

Risks are assessed on an annual basis

Risks identified -

1. Legal support for ad hoc advice is necessary and a solicitor kindly volunteered to assist PoTS UK and continues to do so. As several issues requiring legal advice arose during 2020/21, the charity have instructed the services of Wright Hassall when necessary.
2. At the start of the Covid 19 pandemic in March 2020, the charity's financial status was reviewed and trustees considered that we are not at risk. No special measures were necessary to keep the charity viable. With only one paid member of staff, hours can be monitored closely to ensure staff costs remain manageable. A significant amount of the work is also undertaken on a voluntary basis by trustees. All expenditure will continue to be given great consideration to ensure funds are protected should this pandemic start to impact on the charity more significantly than predicted.
3. Merchandise can easily be copied which would impact upon our potential income from this revenue. Attempted to trademark PoTS UK but this failed and therefore the charity is re-branding in 2021/22 with a logo that is suitable to trademark.

4. Although the charity uses the standard Charity commission template for constitutions, it does not have a clause for the removal of trustees should this be necessary.

Achievements and performance

PoTS UK membership has grown to over 4387 registered members, 100 healthcare professional members and almost 15,000 Facebook followers (an increase of almost 2000 in the last year).

Raising awareness

As of 2019, PoTS UK registered its own PoTS National Awareness Day which is the 25th October. To celebrate the second year, the production and release of our 'What is PoTS? Video was made and shared widely. This has now had over 3200 views and we hope to continue expanding its reach via social media. A plane was also flown along the Blackpool/Fylde and Wyre Coast with a large banner saying PoTS UK on it. The wider PoTS UK team (including medical advisors) also contributed to a 'Meet the Team' video that was created and shared in October. This video celebrated the charity's 10th year. PoTS UK also created a Kudoboard and encouraged members to thank their healthcare professionals. This was a very low cost, new initiative that would be nice to repeat again and encourage greater engagement. Across the country, members hosted their own 'Par-tea for PoTS' and cake sales and one member arranged for Altrincham Town Hall to be lit purple on the day itself.

Despite the pandemic, throughout the year, Prof Kavi has presented and taught at many virtual events including the Heart Rhythm Congress and a session within a cardiology webinar, designed to increase awareness and knowledge of PoTS. This was later distributed to 100,000 cardiology specialists. She has also been developing an open access Syncope Toolkit and e-learning module for the Royal College of GPs, both of which contain information and training on PoTS.

Website

Regular expenditure includes website hosting and mass email system; these are 2 of our main platforms for providing information and we sent a combined total of 23 newsletters/updates in 2020/21 to our medical and patient members. PoTS UK signed up to The Patient Information Forum (PIF) in May 2020 and were awarded their kitemark following a successful review in June 2020. At the beginning of 2020, a process to review the entire

website content started and is now close to completion. It has been a considerable task and the team are proud of the work they have undertaken to complete this within the deadline. Thank you to Lorna Nicholson for leading this project in her role as Information Production Manager. As standard practice, our target audience is now consulted ahead of any new information production to ensure it is as useful as possible for the end user. In addition to reviewing the existing content, PoTS UK are proud to have added a new document, 'Employments and PoTS', the need for was highlighted in the PoTS Survey. The website now receives up to 50,000 visits per month. The feedback about the website, following the PoTS UK survey completed in January was extremely positive.

Social Media

The PoTS UK Facebook page continues to thrive and new initiatives have been added throughout the year to encourage engagement. These include a weekly Friday question. The charity is seeking support/advice in order to continue to grow and improve our social media presence and this will continue throughout 2021. Twitter (3500 followers) and Instagram (2040 followers) have been used less in 2020/21 but they have a good following and we see these platforms as a priority for 2021/22.

YouTube Channel

In February 2020, we launched our PoTS UK YouTube channel as a way of easily sharing both the London PoTS Masterclass videos and the monthly patient focussed webinars. This channel now has 884 subscribers.

National Lottery Grant Application

In April 2021, PoTS UK submitted their first, large scale grant application to the National Lottery Reaching Communities Fund. Sadly, we found out in November 2021 that we were unsuccessful with our application. We were told that it was one of several which were recommended for funding but ultimately not prioritised by the panel for the limited amount of funding available. The panel explained they could see PoTS UK has strong credibility in the voluntary and health sectors and that the project was well planned but sadly, their funding for 2021/22 was very limited compared to previous years. Whilst this is disappointing, we are pleased our proposal was recommended for funding and can use this application with confidence as a framework when applying for other grants in the future.

PoTS UK Charity Survey

In January 2021, patients/carers were invited to complete our survey. The survey aimed to discover what the charity does well, what we could improve upon and what else people would like us to do. It was completed by 1362 people. It was extremely useful in guiding our National Lottery Grant application and will continue to feed into the decisions that the charity makes – ensuring we are keeping patients' views at the heart of every strategic decision.

Merchandise

At the start of the pandemic, sales of merchandise had to cease. Sales commenced again at the end of October and items continue to be very popular with lots of sizes and colours now out of stock. As we are working on re-branding, we will not be purchasing any new merchandise until we have our new logo and branding in place in 2021/22.

Working with other Charities

We have been pleased to collaborate with EDS Support UK, Mast Cell Action, HMSA and the Arrhythmia Alliance.

Volunteers

The charity is very fortunate to have many volunteers who support it with a range of tasks. Thank you to everyone who has supported PoTS UK this year, especially Melloney Ferrar who answers the Support mailbox queries, Lorna Nicholson who supports the website review and Louise Thompson who amongst several other tasks, sends all of our thank you cards and emails to donors/fundraisers.

Health care professional education and patient events

Webinars - Monthly webinars commenced in April 2020 and have been very well received. Sessions so far include:

- Long-Covid & PoTS - Effect on life and work
- Astriid - Finding inclusive opportunities and supporting people on their journey back to work
- Q&A with Dr Nick Gall
- Managing Fatigue
- PoTS and Autonomic Disorders: Thinking outside the gastrointestinal box

- Breathing
- Advice for Parents of People with PoTS
- The role of exercise in managing PoTS
- Practical Tips - Visit to the clinic
- Nutrition and PoTS
- PoTS and Physical Activity
- Pilates for PoTS and Hypermobility
- Physical Activity and Emotional Well-being during lockdown

Retreat - The Cotswold retreat was due to be held on 4th April 2020 and was then rescheduled, due to Covid-19 until 24th October 2020. Restrictions at this time meant the event had to be postponed again and the charity agreed waiting for a full year would be the safest option. The date was changed to 24th October 2021 and offered as both an online and in person event to allow as many people as possible to attend. Those who had purchased tickets were offered the option of moving their tickets to the new date or a full refund. The retreat went ahead on the 24th October 2021 and was a huge success. We look forward to holding more of these events in the future.

UK PoTS Guidelines

The long-awaited textbook 'Postural Tachycardia Syndrome: a concise and practical guide to management and associated conditions' has been completed and was published by Springer in October 2020. PoTS UK trustee Prof Lesley Kavi, alongside PoTS UK medical advisors, Dr Nick Gall and Prof Melvin Lobo have contributed to and edited this book. We are very grateful for the contributions made by many PoTS specialists from the UK and North America who have given so freely of their time and expertise.

PoTS UK Publications

We have distributed hundreds of our PoTS booklets for patients to hospital clinics throughout the UK. We regularly receive requests for further booklets demonstrating that they have proved useful. These booklets will be updated in 2022.

Research and Academic Publications

Supporting Medical Research:

PoTS UK continue to support a number of research projects, especially by assisting with recruitment of patients.

PoTS Live (ongoing from 2019/20) – PoTS UK was delighted to support this research and helped recruit participants for the study. The project aims to explore what it is like living with PoTS on a day-to-day basis, for individuals who have PoTS and also for their families or partners. By sharing experience, the hope is that it will help other people with PoTS and healthcare professionals (doctors and nurses) to better understand the condition and the types of support that are needed. Origins Insights (<https://origins-insights.com/>), a health experience research company is organising and running the project in collaboration with PoTS UK. Participants were asked to film themselves for about five to ten minutes each day, for the duration of the project, using an app on their phone.

Analysis is now well underway, with the project team adopting Interpretative Phenomenological Analysis (IPA) which involves analysing all footage for one participant before moving on to the next. So far, the emerging themes are around misunderstanding of condition, the significant impact this can have in a variety of contexts, and also the difficulty in having a condition that mimics anxiety symptoms whilst patients don't necessarily feel cognitively anxious. PoTS Live has fed into the development of the Compassionate Mind App and is also leading to publications in peer-reviewed journals (provisionally accepted). Dr Samantha Waterman, lead researcher, is attending the retreat in October 2021 to give an update on how the project is progressing and to share early findings.

PULSE (ongoing from 2019/20) – A team of people from Coventry University, PoTS UK, UHCW, UCL and Warwick University have been awarded British Heart Foundation funding to Co-Create (develop with significant input from patients) to carry out a feasibility trial of a physical activity programme for people with PoTS. The grant application was developed with PoTS UK, people affected by PoTS, and healthcare professionals. The first stage of this funding is to work together to co-create with patients what the physical activity programme should look like, who it should include, and how it can be tailored to individuals.

<http://pulse-project.coventry.ac.uk/>

PoTS UK have supported a further 5 research projects and we look forward to seeing the results of these studies in 2021/22. We would like to thank all the patients and families who responded to these requests.

Supporting parents and patients

PoTS UK answers a large number of email enquiries from patients and family members/carers/friends and there has been a considerable increase in the number of enquiries since Covid-19. We also receive and answer enquiries from teachers, healthcare professionals and professionals from other disciplines who require advice and guidance in order to better support their clients with PoTS.

At the request of hospital clinicians, we were able to provide relevant covid related guidance on our website covering frequent enquiries to their service to reassure patients.

In response to the Covid-19 pandemic, we felt the need to offer more support to our members and our monthly webinars are becoming increasingly popular with every session reaching full capacity. We plan to further develop these in 2021/22.

The Parents of People with PoTS Facebook group set up many years ago by one of the PoTS UK trustees continues to be very active and well used and now has over 750 members.

PoTS UK have worked hard developing a compassionate mind coach app. The project is well underway and we hope it will be launched in 2021/22. The potential benefits of this app will be to reduce the strength of self-criticism and associated negative emotions (including any anger, guilt or shame). Additionally, it may help to improve autonomic balance and function by activating soothing body systems and parasympathetic activity. It might also help with the development of courage for self-care tasks which may help improve sleep and fatigue and engagement and quality of life.

Services for patients

- We continue to maintain an on-line register of NHS consultants with an interest in managing patients with PoTS. We regularly ask our members for updates on this via social media so we can keep it as up to date as possible.
- We continue to lobby for better patient services for affected people. We have contacted NHS England, government officials and various hospital trusts about the need to improve access the healthcare for affected patients. Our new patron, Cat Smith MP is also keen to

raise awareness and put PoTS in the spotlight at any suitable opportunities.

- We send monthly newsletters with up-to-date information

Goals for next year and the future

Patient/Parent support

- To pilot and release new Compassionate Mind App
- To hold the patient retreat in October 2021
- Continue to hold monthly webinars on a range of topics associated with PoTS
- Commence a pilot of geographical, virtual support groups
- To plan a family event suitable for all ages between Q4 2021/22 and Q2 2022/23
- To further develop remote and hybrid events if our grant application is successful

Medical professional awareness

- To raise awareness of PoTS amongst GPs
- To encourage contributions from overseas experts via the Visiting Speaker Fund and conference programming
- To begin planning the next Masterclass/regular podcasts - to take place in 2022. The scale of our offering will be dependent upon securing the National Lottery funding.

Research

- To support international and local research initiatives
- Continue to support PULSE Co-Creation physical activity programme
- To update our previous large patient survey - supported by researchers at Coventry University (incorporating Covid-19 impact)

Access to care

- To develop ideal patient pathways and patient-centred multi-disciplinary treatment approaches
- To set up a working party to service models, commissioning and access to NHS care

- Continue to work towards improved access to care for all patients throughout the UK

Charity Development

- Full re-branding
- To develop and implement Communications Strategy, particularly within our social media platforms.
- Ongoing review of charity structure and governance including recruitment of new trustees
- To provide further training to Trustees and charity secretary
- Develop new merchandise to sell – raising both funds and awareness
- Develop our volunteer framework
- Recruit a new member of the team for the 6-month placement via the DWP Kickstart scheme

Covid-19 has impacted the whole world and the impact on our small charity has been limited to date. As expected, fundraising reduced and the Patient Retreat has had to be rescheduled to October 2021. Experts are anticipating an explosion in the number of PoTS cases as a result of long-Covid, and media coverage about PoTS is increasing considerably as a result. The charity is hopeful that with the spotlight turning to PoTS, sufferers may achieve the long-awaited opportunity to be heard, understood and supported. PoTS UK intend to seize this opportunity and will be enlisting the services of a PR company to drive forward a targeted media campaign in 2021/22.

We will continue to refine how we will offer more patient and healthcare professional education and support virtually if the situation does not improve sufficiently. We have made positive steps towards this with the webinars which allow us to reach previously excluded individuals who live remotely or are unable to travel.

As the world adapts to a new way of working, as a small charity PoTS UK is able to adapt quickly to ensure we are still able to meet our goals and objectives.

Signed on behalf of the trustees by Prof Lesley Kavi, Trustee and Chair, PoTS UK

A handwritten signature in black ink, appearing to be 'Jm', is placed on a light gray rectangular background.

Date: 30/12/20



Receipts and payments accounts


CC16a

For the period from	Period start date 06/04/2020	To	Period end date 05/04/2021
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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 £
A1 Receipts					
Donations	45,175	-	-	45,175	42,278
Sales of merchandise	1,607	-	-	1,607	9,807
Compensation receipts	-	-	-	-	132
Bank interest	-	-	-	-	11
Symposium ticket sales	-	-	-	-	3,075
Contribution to symposium cost	-	-	-	-	1,000
Contribution to retreat cost	-	-	-	-	300
Sub total (Gross income for AR)	46,782	-	-	46,782	56,603
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	46,782	-	-	46,782	56,603
A3 Payments					
Printing, postage and stationary	499	-	-	499	671
Advertising and promotional expenditure	5,798	-	-	5,798	1,080
Wages and salaries	9,701	-	-	9,701	7,720
Computer expenses and consumables	2,675	-	-	2,675	264
Cost of hosting Masterclass symposium	-	-	-	-	13,483
Cost of providing Retreat	1,383	-	-	1,383	3,465
Accountancy fees	2,100	-	-	2,100	1,836
Trustee travelling and other expenses	752	-	-	752	1,352
Office Supplies	276	-	-	276	320
Training	205	-	-	205	484
Purchase of promotional items	250	-	-	250	9,390
Insurance	393	-	-	393	348
Consultancy work	-	-	-	-	1,146
Selling fees	18	-	-	18	313
Other	-	-	-	-	68
Development of Compassionate Mind App	9,600	-	-	9,600	-
Trade mark application	320	-	-	320	-
Subscriptions	975	-	-	975	-
Sub total	34,945	-	-	34,945	41,940
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	34,945	-	-	34,945	41,940
Net of receipts/(payments)	11,837	-	-	11,837	14,663
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	90,964	-	-	90,964	76,301
Cash funds this year end	102,801	-	-	102,801	90,964

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 £
B1 Cash funds	Current account	102,759	-	-
	Savings account	42	-	-
		-	-	-
	Total cash funds	102,801	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	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	
		Lesley Kavi	29/12/21	



Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name
PoTS UK

On accounts for the year ended

5 April 2021

Charity no (if any)

1159813

Set out on pages

102

(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 05/04/2021.

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:

31.2021

Name:

MARTIN MAY

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

ICAEW

Address:

SOBELL RHODES LLP

CHARTERED ACCOUNTANTS

THE KINETIC CENTRE
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