

# ELEVATE

England & Wales · Charity number 1163004

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2015-08-05

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** Cardiff House  
Cardiff Rd  
Barry  
Wales  
CF63 2AW

**Phone** 01446400794

**Email** [info@elevate.community](mailto:info@elevate.community)

**Website** [elevate.community](http://elevate.community)

## Activities

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**Objects:** TO ACT AS A RESOURCE FOR YOUNG PEOPLE UP TO THE AGE OF 21 IN PARTICULAR BUT NOT EXCLUSIVELY LIVING IN THE VALE OF GLAMORGAN BY PROVIDING ADVICE AND ASSISTANCE AND ORGANISING PROGRAMMES OF PHYSICAL, EDUCATIONAL AND OTHER ACTIVITIES AS A MEANS OF: (A) ADVANCING IN LIFE AND HELPING YOUNG PEOPLE BY DEVELOPING THEIR SKILLS, CAPACITIES AND CAPABILITIES TO ENABLE THEM TO PARTICIPATE IN SOCIETY AS INDEPENDENT, MATURE AND RESPONSIBLE INDIVIDUALS; (B) ADVANCING EDUCATION; (C) RELIEVING UNEMPLOYMENT; (D) PROVIDING RECREATIONAL AND LEISURE TIME ACTIVITY IN THE INTERESTS OF SOCIAL WELFARE FOR PEOPLE LIVING IN THE AREA OF BENEFIT WHO HAVE NEED BY REASON OF THEIR YOUTH, AGE, INFIRMITY OR DISABILITY, POVERTY OR SOCIAL AND ECONOMIC CIRCUMSTANCES WITH A VIEW TO IMPROVING THE CONDITIONS OF LIFE OF SUCH PERSONS.

**Activities:** Elevate is a coaching and mentoring charity that works with young people to improve self-esteem, raise aspirations, build skills and reduce disengagement with education and society.

## Classification

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- **How:** Provides Services
- **What:** General Charitable Purposes
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin

## Geography

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- Blaenau Gwent
- Bridgend
- Bristol City
- Caerphilly
- Cardiff
- Rhondda Cynon Taff
- Vale Of Glamorgan

## Finances

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Period end	Income	Expenditure	Assets	Employees
2025-03-31	£103,016	£100,301	-	-
2024-03-31	£118,756	£100,168	-	-
2023-03-31	£105,178	£113,471	-	-
2022-03-31	£100,855	£110,327	-	-
2021-03-31	£173,390	£71,154	-	-

## Trustees

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Name	Role	Appointed
LYNDON RUSSELL WATKINS	Chair	2018-10-26
DAVID WILLIAMS		2018-10-26
MARK NICKERSON		2018-10-26

**ELEVATE**

England & Wales - Charity number 1163004

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# Accounts

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# elevate

Raising Skills, Lifting Aspirations, Improving Community

# TRUSTEES ANNUAL REPORT & FINANCIAL STATEMENTS

YE 31 MARCH 2025

## Chairman Summary

This year, Elevate has continued to change lives by supporting young people at risk of disengaging from education. Through our one-to-one coaching programme, 285 young people were given the chance to build resilience, self-confidence, and optimism for their future. The majority told us they felt more positive, better able to regulate their emotions, and more equipped to overcome barriers in their lives.

We are especially proud of the growth of our Near Peer Coaching programme. By training 180 secondary school pupils and university students, we have empowered young people to support one another.

A key development has been the expansion of our Near Peer Coaching initiative. Extending our reach and empowering young people to support one another. Schools have responded positively, with growing interest from primary settings.

Financially, we ended the year with healthy reserves, providing us with a strong platform for future work. Looking ahead, we are committed to building sustainability through fundraising, service charging, and deepening our partnerships.

None of this would be possible without the dedication of our volunteers, staff, and, most importantly, the generosity of our supporters. Your belief in our mission enables us to continue this vital work and inspire hope in the next generation.



Lyndon Watkins  
Chairman of the Board of Trustees

**Charity Name:** ELEVATE  
**Charity Number:** 1163004  
**Charity Address:** The Business Centre  
Cardiff House  
Cardiff Rd  
Barry  
CF63 2AW

## **SECTION 1**

### **TRUSTEES:**

Lyndon Watkins	CHAIR/CFO
Mark Nickerson	Trustee
Dave Williams	Trustee

### **ADVISORS**

Jo Daley	MOE Coach Trainer
HSBC Bank Menzies LLP	Community Banking Independent Examiner

### **SENIOR STAFF**

Kantz Misra	Project Director
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## SECTION 2

GOVERNING DOCUMENT	The charity is governed by constitution adopted in Aug 2015
STATUS	The Charity is a CIO
TRUSTEE SELECTION	Appointed / reappointed by a trustee board annually

### ADDITIONAL GOVERNANCE

The charity has the following policies in place:

Safeguarding Policy	Annually Reviewed
Health & Safety Policy	Annually Reviewed
Flexible Working Policy	Annually Reviewed
Bullying & Harassment Policy	Annually Reviewed
Lone Workers Policy	Annually Reviewed
Home Working Policy	Annually Reviewed
Performance and Appraisal Policy	Annually Reviewed
Social Media Policy	Annually Reviewed
Adverse Weather Policy	Annually Reviewed
Staff Expenses Policy	Annually Reviewed
Substance Abuse Policy	Annually Reviewed
Volunteer Policy	Annually Reviewed
Volunteer Expenses Policy	Annually Reviewed
Environmental Statement	Annually Reviewed
Financial Controls Policy	Annually Reviewed
Time off For Dependents Guidance	
Staff Handbook	

All policies are reviewed. DBS checks are carried out on all staff and volunteers who will work with young people.

The Project Director is a member of the Special Group in Coaching Psychology part of the British Psychological Society.

The Charity works closely with the University of South Wales.

The Charity is a member of the Glamorgan Voluntary Services organisation.

The Charity works collaboratively with local statutory services.

The charity is an organisational member of the Association for Coaching.

All the Charity Trustees operate in a voluntary capacity.

## SECTION 3

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

To act as a resource for young people up to the age of 21 in particular but not exclusively living in the Vale of Glamorgan by providing advice and assistance and organising programmes of physical, educational, and other activities.

Summary of the Main Activities Undertaken for the public benefit in relation to the objects:

In planning and delivering our activities for the reporting period outlined above, the trustees kept in mind the Charity Commissions guidance on public benefit at our trustee meetings.

The focus of our activities is on the well-being and engagement of young people at risk of disengaging with the education. We provided one-to-one coaching interventions to referred young people. These programmes benefit the young person in developing their self-agency in dealing with the barriers they face in engagement. In addition, it develops their self-confidence, resilience, optimism, and social skills. The interventions provide young people with a safe space to discuss their life goals, personal issues, and their perceived barriers, encouraging them to be solutions focussed and future orientated. They are enriched by the experience and develop coping strategies and solutions to self-regulate.

Programmes are delivered by staff, freelancers and by trained volunteers from the community, near peer volunteers (these are young people closer to the age of the young people they will be coaching) and undergraduates.

The charity receives and welcomes referrals regardless of gender, ethnicity, faith, personal background, and sexuality.

A great contribution is made by trained volunteers, who give up their time to deliver hours of one-to-one coaching. In this space they actively listen, ask challenging questions, and create rapport that allows open and honest discussion and solutions to be found to the barriers the beneficiary faces. We are extremely grateful to our volunteers and staff. They approach the support provided with enthusiasm, and genuine interest in supporting the young person they are matched with.

The charity relies on grant funding to carry out its activities and is consistently seeking funding streams to support and expand its work.

## **SECTION 4**

### **PROJECT BACKGROUND, ACHIEVEMENTS AND PERFORMANCE**

The following is a summary of the report submitted by the project director:

#### **A) Background Outline**

- The project focus for this reporting year is on Near Peer Coaching.
- The project worked with 18 schools in the Vale of Glamorgan, and Cardiff between April 2024 to March 2025.
- Staff carried out in-schools one-to-one work from April 2024 to March 2025. External volunteers carried out in-schools work from February 25.
- What is presented here is data collected from those that did feedback, and were able to do so, via electronic form submission or via in-school submission. Elevate collect pre-test, post-test data with one-to-one beneficiaries. We use pre-test, post-test measures; Muris Self-Efficacy assessment, and the Rosenberg Self-Esteem assessment. Both are internationally recognized psychometrics the former specifically for young people. The project director is qualified as a British Psychological Society educational tester.

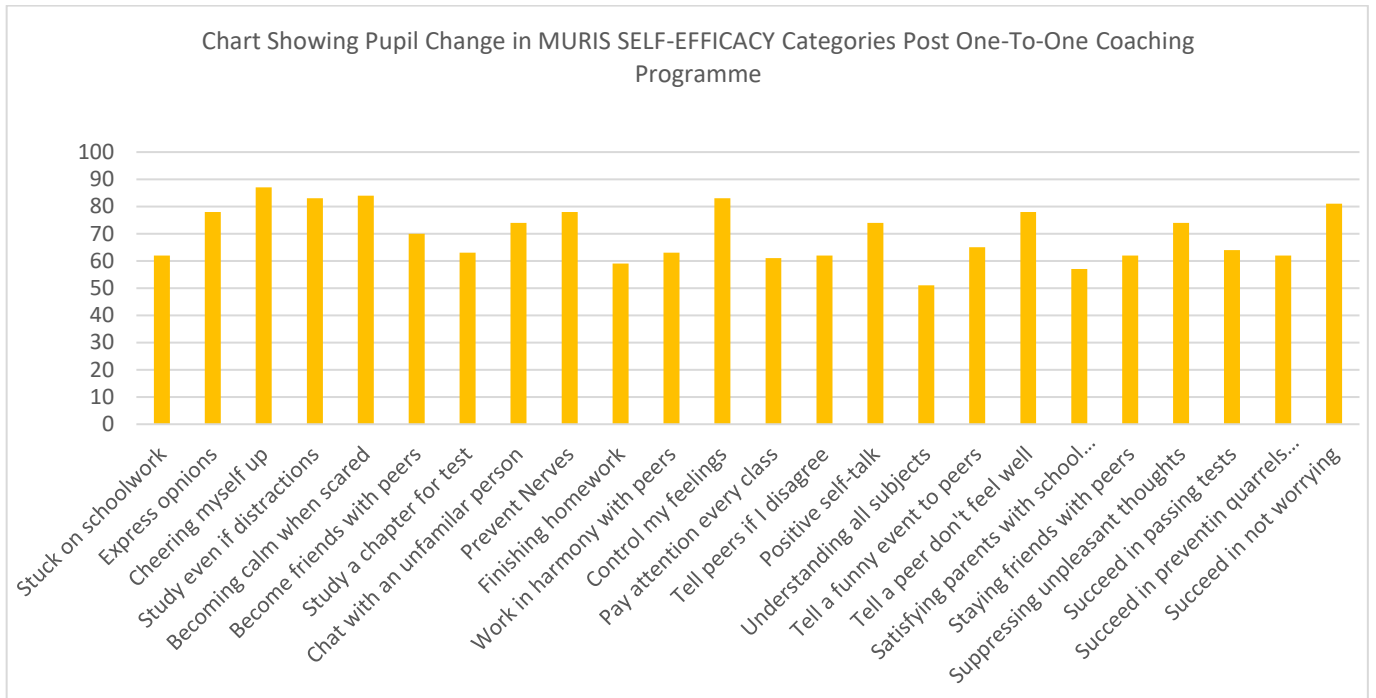
#### **B) One to One Coaching**

Elevate continued to offer its one-to-one coaching service.

All the beneficiaries referred to the coaching programme are identified by the school as requiring a more-focussed approach. To meet demand, Elevate continued its contract with a freelance coach. All the beneficiaries put forward are given an opportunity to identify what it is that they want to see positively change in their lives because of the coaching relationship.

In the reporting year the coaching service served 285 young people referred. Attendance of beneficiaries ranged from 83%-100% on our coaching programme. We received data from 214.

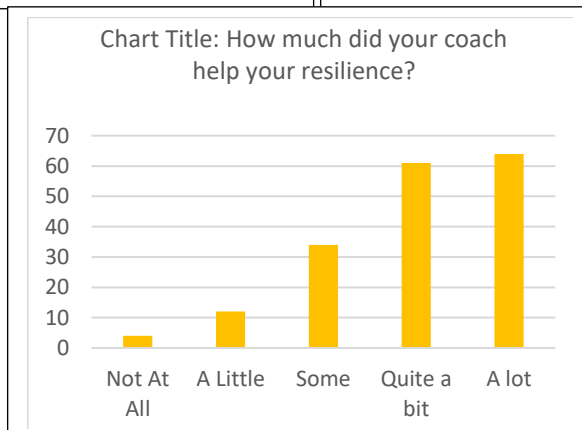
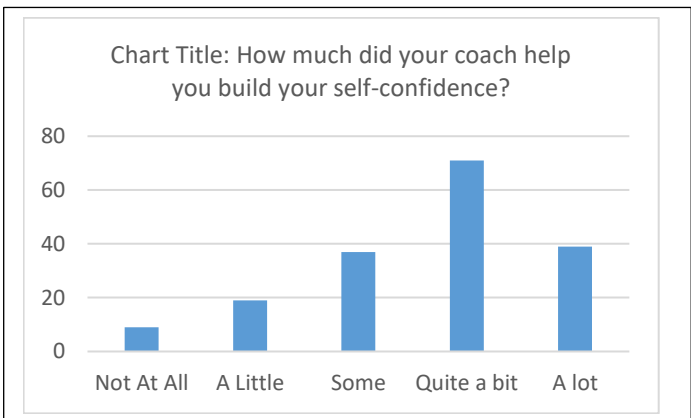
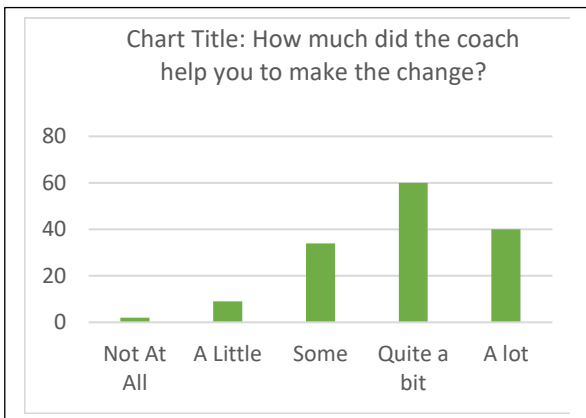
The coaching helped the clients to increase their sense of positivity, emotional self-regulation, thinking skills in managing their own mental health and associated behaviours. Clients stated that coaching helped them with their resilience, with the majority self-reporting increases in self-confidence and that the coach played a significant role in helping to bring about these changes. An assessment was carried out as to which coaching behaviours (behaviour of the coach) was most helpful. 86-88% found that the coach offering a non-judgemental space was useful. 84-87% stated that having someone help clarify the issues, motivate and acting in an encouraging manner to allow them to come up with their own solutions was important too.



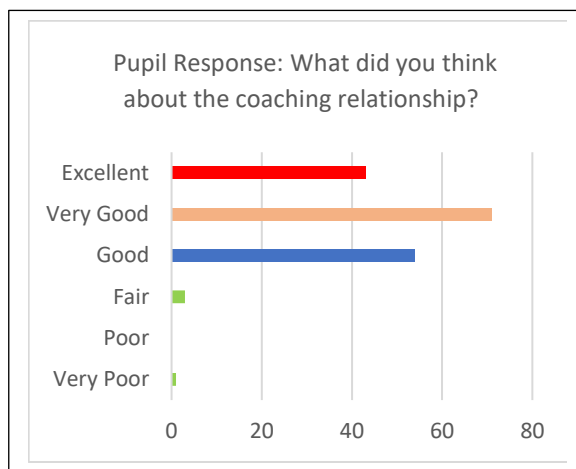
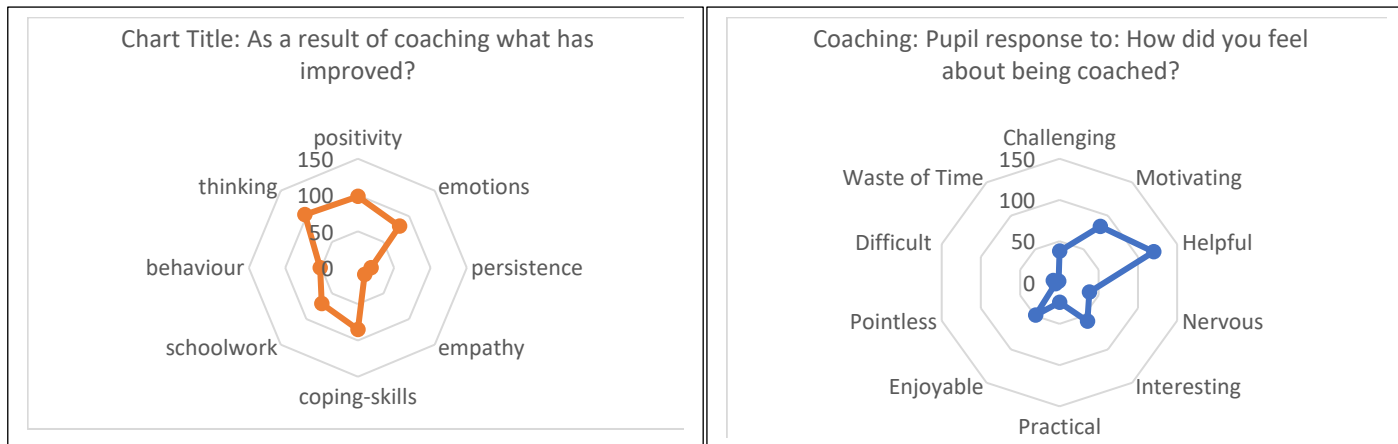
Muris data above suggests most beneficiaries improve in emotional self-efficacy.

Qualitative data showed most clients found the intervention improved their positivity, their thinking, and their emotions.

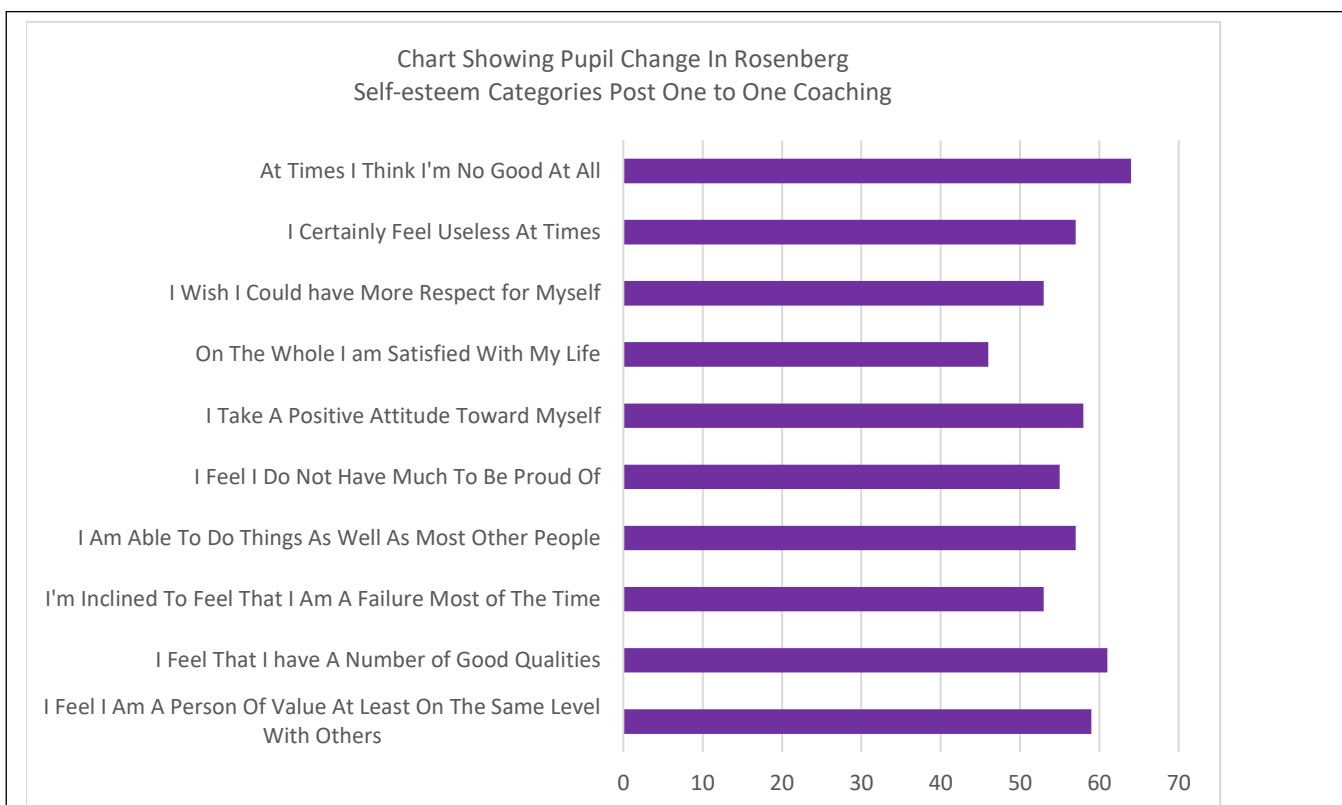
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient and self-confident.



This surface radar and bar chart below suggests that the coaching relationship was helpful, motivating and most beneficiaries found it good to excellent.



The project also measured self-esteem data using the Rosenberg Self-Esteem Scale. Most reported an improvement in thinking more positively about themselves. Of those that Elevate were able to collect data from the majority reported an increase in their self-esteem.



## **C) Near Peer Coaching**

The Near Peer Coaching project works to build the capacity of schools to provide well-being coaching for young people who are identified as having mild to moderate well-being needs. The project works to train older pupils who apply through their school systems to become Near Peer Coaches. The project was initially piloted as result of ideas coming out of the schools, from staff and our beneficiaries. Young people fed-back that pupils in schools feel more comfortable talking to their peers and would value a listening peer, who was skilled in supporting them. The aim for the charity is to put a Near Peer Coach in every secondary school in Wales. From April 2024 to March 2025, we trained 180 near peer coaches across secondary schools in the Vale, Cardiff and 4 university near peer coaches, whom we matched with beneficiaries in schools in Cardiff.

Near Peer university coaches were asked about their experience, and reported back positively about their voluntary activity. They were well supported and resourced.

University volunteers coached 16 young people. Exit data for all beneficiaries could not be gathered in time for this annual report.

## **D) FINAL COMMENTS**

This report covers activity with beneficiaries from April 2024 to March 2025 in its report. The charity has already received enquiries from more schools about its Near Peer Coaching programmes, including primary schools.

## **SECTION 5**

### **FUTURE PLANS**

The charity will continue to deliver its current grant funded activities.

The trustees champion the further development of the Near Peer Coaching programme and continue to believe this will enable the charity to widen its reach cost effectively. The charity will continue to provide one to one coaching for young people. Going forward the charity intends to charge for its services to schools.

The charity is in dialogue with the funders for a Near Peer Coaching programme for funding potential projects serving primary schools.

The charity continues to be engaged in research collaboration.

## **FINANCIAL REVIEW & RESERVES POLICY**

### **Financial Year from April 2024 – March 2025**

In the year ended 31 March 2025, the charity's activities saw a demand for its work. The charity received an additional £79,105 and an income of £28,958 was received from our training programmes, and donations.

For a full operational year, the annual costs of 2025: £100,301 gave a year-end fund of £116,357

Although the grants have provided restricted working capital, the charity's year-end reserves unallocated, unrestricted funds of £60,398 is adequate to fund working capital for future work-streams. The charity's aim is, through fundraising and primary-purpose trading, to continue to build up reserves to provide general working capital.

This trustees' annual report was approved by the trustees on 25th of November 2025 and signed on their behalf by:

A handwritten signature in black ink, appearing to read 'Lyndon Watkins', written over a faint horizontal line.

Lyndon Watkins, Chair

## **Independent Examiner's Report to the Trustees of Elevate**

I report to the Charity Trustees on my examination on the accounts for the year ended 31 March 2025.

### **Responsibilities and basis of report**

As the Charity Trustees of the Charitable Incorporated Organisation, 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 Charitable Incorporated Organisation's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all 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 in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records

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



Mr Clive Edwards FCA  
Menzies LLP  
5<sup>th</sup> Floor Hodge House  
114-116 St Mary Street  
Cardiff  
CF10 1DY  
27 November 2025

**Elevate Receipts and Payments Accounts: Year ending 31 March 2025**

	Unrestricted Funds	Restricted Funds	Total for Year	
	£	£	2024/25	2023/24
<b>Receipts</b>				
Donations	4,310	-	4,310	9,724
National Lottery Community Fund	-	78,880	78,880	97,634
WCVA Grant	-	-	-	-
Training	18,380	-	18,380	9,822
Other income	-	46	46	156
Bank interest	-	-	-	-
	<u>22,690</u>	<u>78,925</u>	<u>101,615</u>	<u>117,336</u>
<b>Asset and investment sales</b>				
Loans/Deposit Accounts	4,868	180	5,049	1,420
Loans received from WCVA	-	-	-	-
Sale of assets	<u>1,400</u>	<u>-</u>	<u>1,400</u>	<u>-</u>
Total receipts	<u>28,958</u>	<u>79,105</u>	<u>108,064</u>	<u>118,756</u>
<b>Payments</b>				
Staff	-	76,268	76,268	79,507
Service delivery	-	13,295	13,295	11,407
Promotion/Marketing & Advertising	-	714	714	714
Administration	-	10,025	10,025	8,541
Total payments	<u>-</u>	<u>100,301</u>	<u>100,301</u>	<u>100,168</u>
Net of receipts/(payments)	28,958	(21,196)	7,762	18,588
Cash funds last year end	31,440	77,155	108,595	90,007
<b>Cash funds this year end</b>	<u><b>60,398</b></u>	<u><b>55,958</b></u>	<u><b>116,357</b></u>	<u><b>108,595</b></u>

## Statement of Assets and Liabilities as at 31 March 2025

### Cash Funds

Bank accounts	<u>60,398</u>	<u>55,958</u>	<u>116,357</u>	<u>108,595</u>
<b>Total cash funds</b>	<b><u>60,398</u></b>	<b><u>55,958</u></b>	<b><u>116,357</u></b>	<b><u>108,595</u></b>

### Assets retained for Charity's own use (at cost)

Laptops/printer	7,512	-	7,512	7,512
Other equipment	1,526	-	1,526	2,880
Furniture	<u>1,670</u>	<u>-</u>	<u>1,670</u>	<u>1,670</u>
<b>Total own use assets</b>	<b><u>10,708</u></b>	<b><u>-</u></b>	<b><u>10,708</u></b>	<b><u>12,063</u></b>

### Liabilities

Independent examination creditor	-	1,783	1,783	1,733
WCVA Loan	-	7,289	7,289	7,788
Other creditors	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
<b>Total liabilities</b>	<b><u>-</u></b>	<b><u>9,072</u></b>	<b><u>9,072</u></b>	<b><u>9,521</u></b>

The trustees confirm, in accordance with the Charitable Incorporated Organisations (General) Regulations 2012, that at the year end the CIO did not have any outstanding guarantees to third parties nor any debts secured on assets of the CIO.

Approved by the trustees on the 25<sup>th</sup> of November 2025 and signed on their behalf by:



Lyndon Watkins, Chair

**ELEVATE**

England & Wales - Charity number 1163004

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# Accounts

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2024

# elevate

Raising Skills, Lifting Aspirations, Improving Community

# TRUSTEES ANNUAL REPORT & FINANCIAL STATEMENTS

**YE 31 MARCH 2024**

## **Chairman Summary**

We have continued to focus on the well-being and engagement of young people who in schools have various presenting needs. There is an increasing need for financial support for projects that work with young people and well-being. The new government has promised changes, we look forward to seeing more finance available for projects like this that have a good track record. The current funding climate is competitive. To that effect the charity is keen to diversify while maintaining the core provision. We will providing a unique blended coaching-counselling service to pupils soon.

What continues to excite us is the number of young people who have expressed interest in wanting to provide near peer support for their younger peers. They continue to deliver much needed in-school support to alleviate the demand placed on well-being systems and services in schools. I thank them, and our adult volunteers who have provided an incredible service to the schools they have been placed in. Feedback from the school senior leadership teams have been consistently positive.

The data reporting in this annual report, clearly shows the impact the charity has on its service users, and no doubt the positive impact this has beyond the direct beneficiaries. Data for this year has been affected by long-term illness in our freelance staff, nevertheless schools have reported positive impact.

We at Elevate continue to try and expand our area of operations, so the invaluable work this charity does is available for more and more young people.

Finally, thank you to our financial supporters, without whom, Elevate would cease to provide such excellent and much needed support to those who increasingly need it.

Lyndon Watkins  
Chairman of the Board of Trustees

## SECTION 1

**Charity Name:** ELEVATE  
**Charity Number:** 1163004  
**Charity Address:** The Business Centre Cardiff  
House Cardiff Rd  
Barry  
CF63 2AW

### TRUSTEES:

Lyndon Watkins

CHAIR/CFO

Mark Nickerson

Trustee

Dave Williams

Trustee

### ADVISORS

Jo Daley

Coach Trainer

HSBC Bank  
Haines Watts Wales LLP.

Community Banking  
Independent Examiner

### SENIOR STAFF

Kantz Misra

Project Director

## SECTION 2

GOVERNING DOCUMENT	The charity is governed by constitution adopted in Aug 2015
STATUS	The Charity is a CIO
TRUSTEE SELECTION	Appointed / reappointed by a trustee board annually

### ADDITIONAL GOVERNANCE

The charity has the following policies in place:

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Staff Handbook	

All policies are reviewed. DBS checks are carried out on all staff and volunteers who will work with young people.

The Project Director is a member of the British Psychological Society to keep informed of evidence-based developments in the field of well-being.

The Project Director is a member of the Special Group in Coaching Psychology part of the British Psychological Society.

The Charity works closely with the University of South Wales.

The Charity is a member of the Glamorgan Voluntary Services organisation.

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## SECTION 3

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

To act as a resource for young people up to the age of 21 in particular but not exclusively living in the Vale of Glamorgan by providing advice and assistance and organising programmes of physical, educational, and other activities.

Summary of the Main Activities Undertaken for the public benefit in relation to the objects:

In planning and delivering our activities for the reporting period outlined above, the trustees kept in mind the Charity Commissions guidance on public benefit at our trustee meetings.

The focus of our activities is on the well-being and engagement of young people at risk of disengaging with the education. We provided one-to-one coaching interventions to referred young people. These programmes benefit the young person in developing their self-agency in dealing with the barriers they face in engagement. In addition, it develops their self-confidence, resilience, optimism, and social skills. The interventions provide young people with a safe space to discuss their life goals, personal issues, and their perceived barriers, encouraging them to be solutions focussed and future orientated. They are enriched by the experience and develop coping strategies and solutions to self-regulate.

Programmes are delivered by staff, freelancers and by trained volunteers from the community, near peer volunteers (these are young people closer to the age of the young people they will be coaching) and undergraduates.

The charity receives and welcomes referrals regardless of gender, ethnicity, faith, personal background, and sexuality.

A great contribution is made by trained volunteers, who give up their time to deliver hours of one-to-one coaching. In this space they actively listen, ask challenging questions, and create rapport that allows open and honest discussion and solutions to be found to the barriers the beneficiary faces. We are extremely grateful to our volunteers and staff. They approach the support provided with enthusiasm, and genuine interest in supporting the young person they are matched with.

The charity relies on grant funding to carry out its activities and is consistently seeking funding streams to support and expand its work.

## **SECTION 4**

### **PROJECT BACKGROUND, ACHIEVEMENTS AND PERFORMANCE**

The following is a summary of the report submitted by the project director:

#### **A) Background Outline**

- The project focus for this reporting year is on Near Peer Coaching.
- The project worked with 19 schools in the Vale of Glamorgan, and Cardiff between April 2023 to March 2024.
- Staff carried out in-schools one-to-one work from April 2023 to March 2024. External volunteers carried out in-schools work from February 24.
- Data collection was affected by not receiving data from freelancers, due to health issues. What is presented here is data collected from those that did feedback, and were able to do so, via electronic form submission or via in-school submission. Elevate collect pre-test, post-test data with one-to-one beneficiaries. We use pre-test, post-test measures; Muris Self-Efficacy assessment, and the Rosenberg Self-Esteem assessment. Both are internationally recognized psychometrics the former specifically for young people. The project director is qualified as a British Psychological Society educational tester.

#### **B) One to One Coaching**

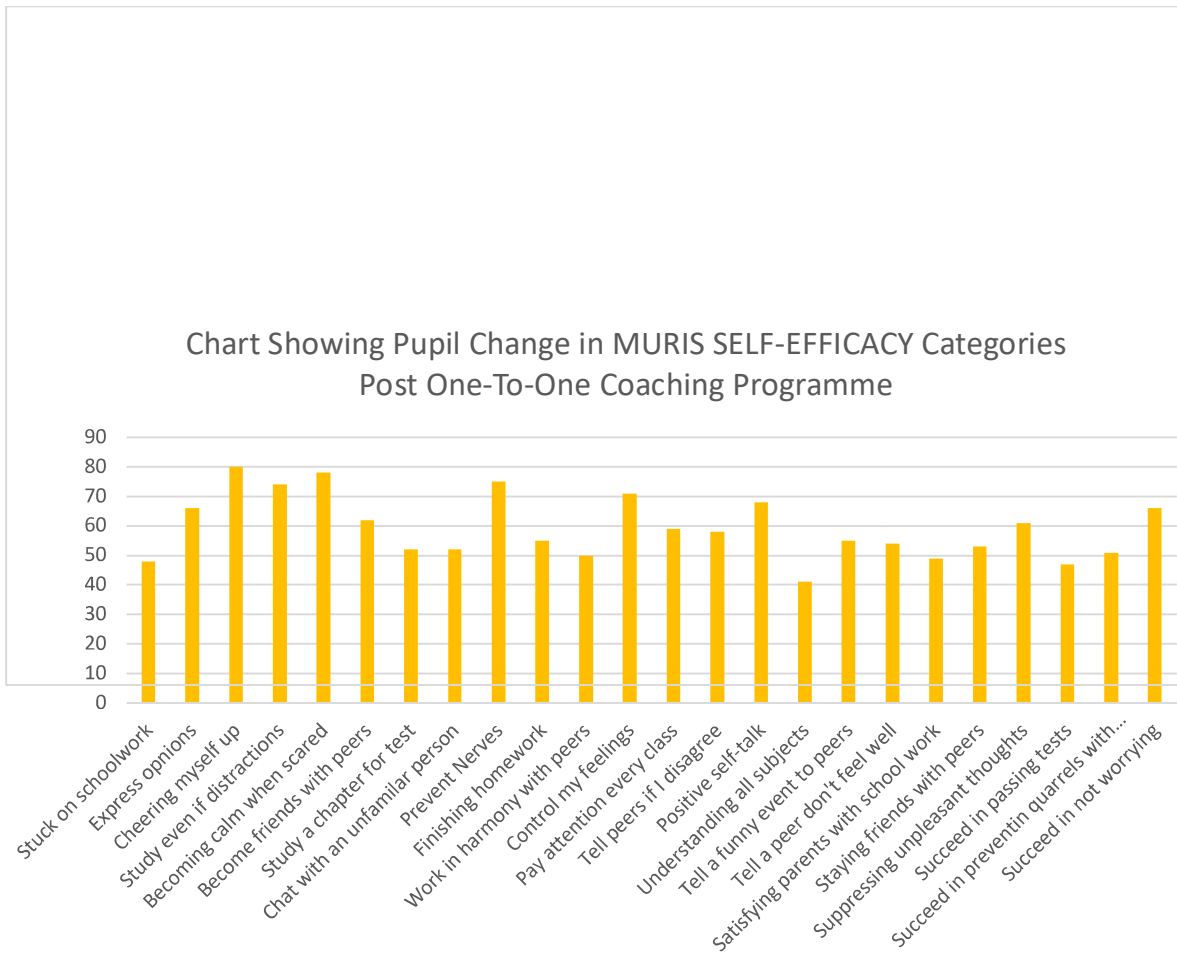
Elevate continued to offer its one-to-one coaching service.

All the beneficiaries referred to the coaching programme are identified by the school as requiring a more-focussed approach. To meet demand, Elevate continued its contract with a freelance coach. All the beneficiaries put forward are given an opportunity to identify what it is that they want to see positively change in their lives because of the coaching relationship.

In the reporting year the coaching service served 176 young people referred. Attendance of beneficiaries ranged from 89%-100% on our coaching programme. We received data from 134.

The coaching helped the clients to increase their sense of positivity, emotional self-regulation, thinking skills in managing their own mental health and associated behaviours. Clients stated that coaching helped them with their resilience, with the majority self-reporting increases in

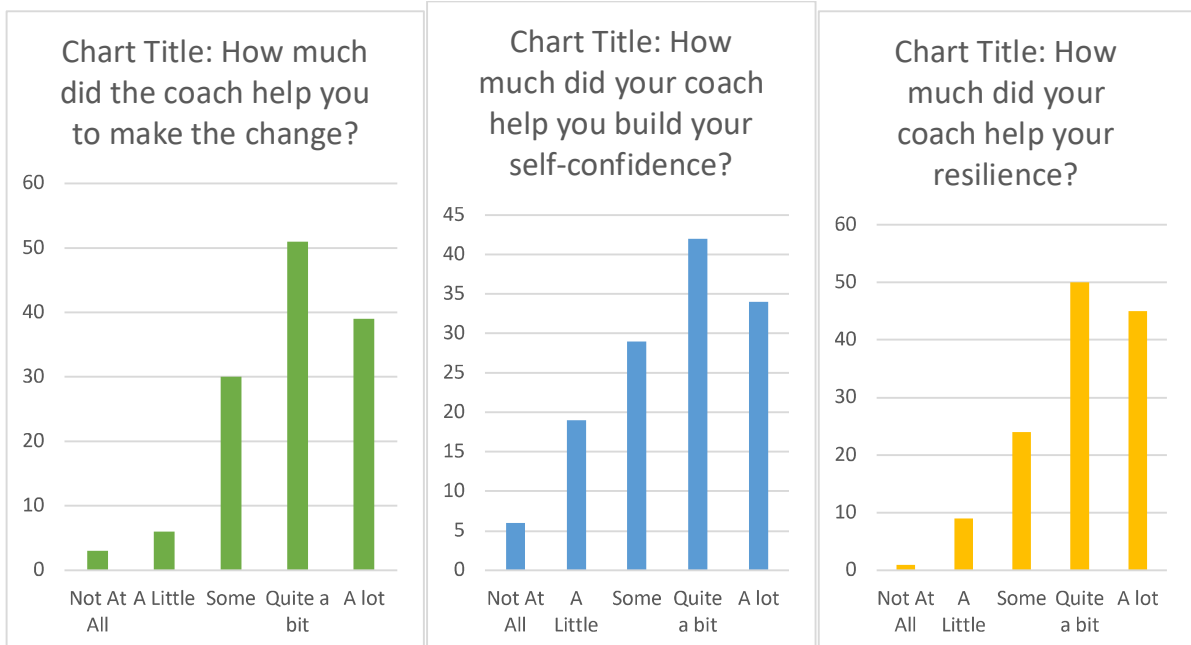
self-confidence and that the coach played a significant role in helping to bring about these changes. An assessment was carried out as to which coaching behaviours (behaviour of the coach) was most helpful. 94% found that the coach offering a non-judgemental space was useful. 90% responding that the coach listening and communicating well was really useful. Other significant behaviours that helped was that the coach was motivating, encouraging, and in showing clients the ability to be more accepting of self.



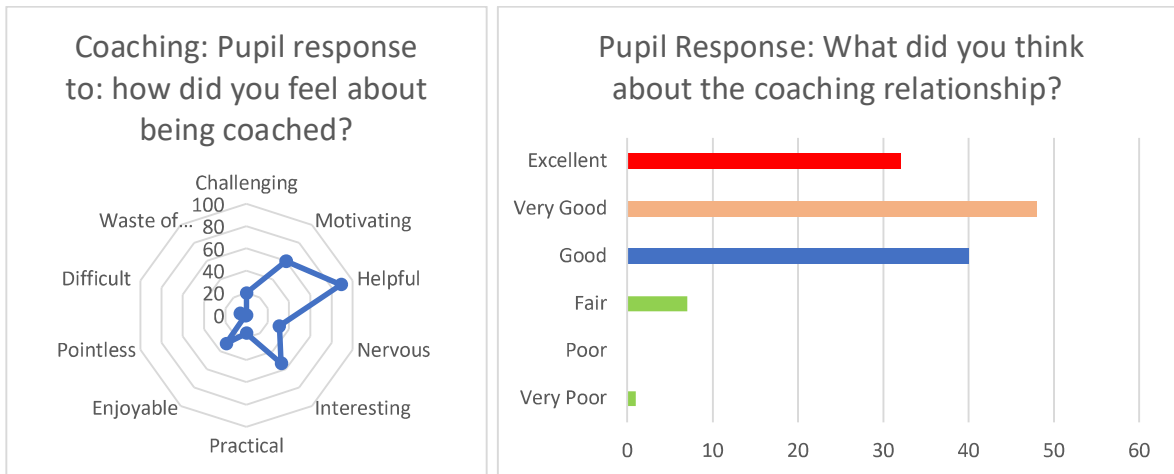
Muris data above suggests most beneficiaries improve in emotional self-efficacy.

Qualitative data showed most clients found the intervention improved their positivity, their thinking, and their emotions.

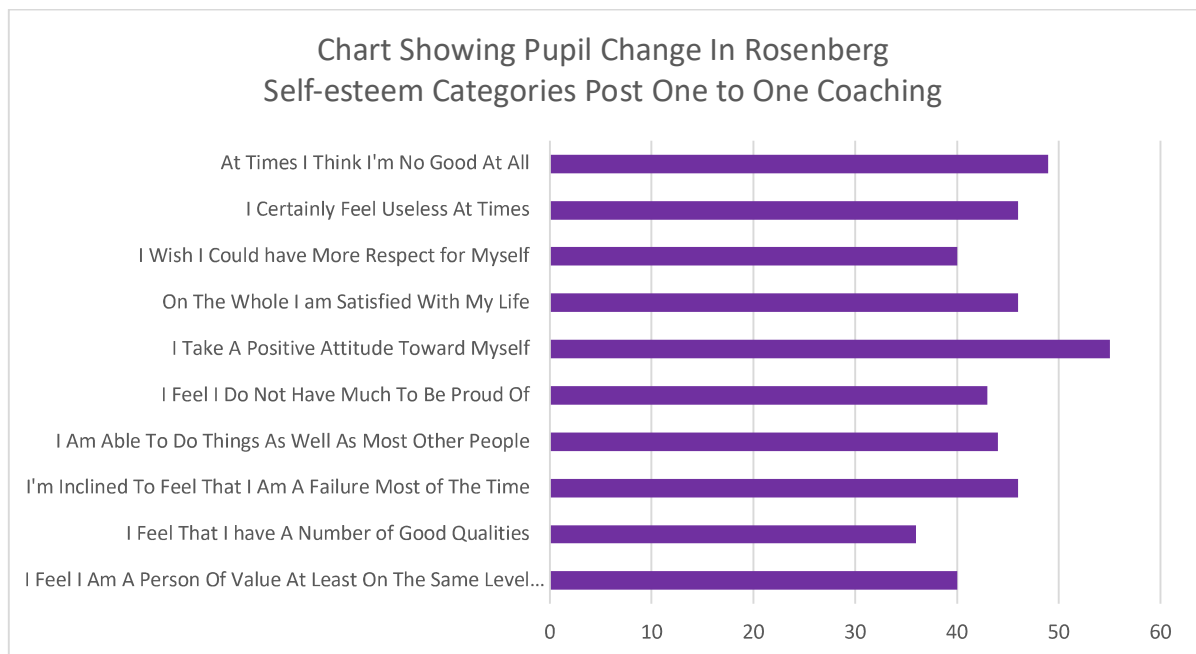
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient and self-confident.



This surface radar and bar chart below suggests that the coaching relationship was helpful, motivating and most beneficiaries found it good to excellent.



The project also measured self-esteem data using the Rosenberg Self-Esteem Scale. Most reported an improvement in thinking more positively about themselves. Of those that Elevate were able to collect data from the majority reported an increase in their self-esteem.



## **C) Near Peer Coaching**

The Near Peer Coaching project works to build the capacity of schools to provide well-being coaching for young people who are identified as having mild to moderate well-being needs. The project works to train older pupils who apply through their school systems to become Near Peer Coaches. The project was initially piloted as result of ideas coming out of the schools, from staff and our beneficiaries. Young people fed-back that pupils in schools feel more comfortable talking to their peers and would value a listening peer, who was skilled in supporting them. The aim for the charity is to put a Near Peer Coach in every secondary school in Wales. From April 2023 to March 2024, we trained 258 near peer coaches across secondary schools in the Vale, Cardiff and 4 university near peer coaches, whom we matched with beneficiaries in schools in Cardiff.

Near Peer university coaches were asked about their experience, and reported back positively about their voluntary activity. They were well supported and resourced.

University volunteers coached 12 young people. Exit data for all beneficiaries could not be gathered in time for this annual report.

## **D) FINAL COMMENTS**

This report covers activity with beneficiaries from April 2023 to March 2024 in its report. The charity has already received enquiries from more schools about its Near Peer Coaching programmes, including primary schools.

## **SECTION 5**

### **FUTURE PLANS**

The charity will continue to deliver its current grant funded activities.

The trustees champion the further development of the Near Peer Coaching programme and continue to believe this will enable the charity to widen its reach cost effectively. The charity will continue to provide one to one coaching for young people. Going forward the charity intends to charge for its services to schools.

The charity is looking at sources of income through coach training, it has been accredited for its training programme by the Association for Coaching. The aim of accreditation is to monetise the charities offerings and create a more self-sustainable model. The charity works closely with Elevate Coaching Services Ltd, which provides training and support for adult clients and generates income from non-grant funded activity. Elevate Coaching Services Ltd has agreed to donate 10% of pre-tax profits to the charity.

The charity is in dialogue with the funders for a Near Peer Coaching programme for funding potential projects serving primary schools.

The charity continues to be engaged in research collaboration.

**FINANCIAL REVIEW & RESERVES POLICY**  
**Financial Year from April 2023 – March 2024**

In the year ended 31 March 2024, the charity activities saw a recovered demand for its work. To meet the increased demand for services as schools go through a recovery period from the pandemic, the charity continued to take on the services of a freelancer. The National Lottery Community fund received an additional [£97,634] and an income of [£21,117] was received from our training programmes and donations.

For a full operational year, the annual costs (all restricted) of £100,168 (2023: £113,471) gave a year-end restricted fund of £77,155 (2023: £90,007).

Although the grants have provided restricted working capital, the charity's year-end reserves (unallocated, unrestricted funds) of £31,440 is adequate to fund working capital for future work-streams. The charity's aim is, through fundraising and primary-purpose trading, to continue to build up reserves to provide general working capital.

This trustees' annual report was approved by the trustees on 12th of September 2024 and signed on their behalf by:

A handwritten signature in black ink, appearing to read 'Lyndon Watkins', written over a faint, large oval shape that serves as a guide for the signature's placement.

Lyndon Watkins, Chair

**Independent Examiner's Report to the Trustees of  
Elevate**

I report to the Charity Trustees on my examination on the accounts for the year ended 31 March 2024.

**Responsibilities and basis of report**

As the Charity Trustees of the Charitable Incorporated Organisation, 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 Charitable Incorporated Organisation's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all 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 in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records

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



Mr Clive Edwards FCA  
Haines Watts Wales LLP  
7 Neptune Court  
Vanguard Way  
Cardiff  
CF24 5PJ

**28 October 2024**

**Elevate Receipts and Payments Accounts: Year ending 31 March 2024**

	Unrestricted	Restricted	Total for Year	
	Funds	Funds	2023/24	2022/23
	£	£	£	£
<b>Receipts</b>				
Donations	9,719	5	9,724	12
National Lottery Community Fund	-	97,634	97,634	94,320
WCVA Grant	-	-	-	-
Training	9,822	-	9,822	9,932
Other income	156	-	156	-
Bank interest	-	-	-	-
	<u>19,697</u>	<u>97,639</u>	<u>117,336</u>	<u>104,263</u>
<b>Asset and investment sales</b>				
Loans/Deposit Accounts	1,420	-	1,420	914
Loans received from WCVA	-	-	-	-
	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total receipts	<u>21,117</u>	<u>97,639</u>	<u>118,756</u>	<u>105,177</u>
<b>Payments</b>				
Staff	-	79,507	79,507	75,975
Service delivery	-	11,407	11,407	23,214
Promotion/Marketing & Advertising	-	714	714	1,011
Administration	-	8,541	8,541	13,271
	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total payments	<u>-</u>	<u>100,168</u>	<u>100,168</u>	<u>113,471</u>
Net of receipts/(payments)	21,117	(2,529)	18,588	(8,294)
Cash funds last year end	10,323	79,684	90,007	98,301
<b>Cash funds this year end</b>	<u><b>31,440</b></u>	<u><b>77,155</b></u>	<u><b>108,595</b></u>	<u><b>90,007</b></u>

**Statement of Assets and Liabilities as at 31 March 2024**

<b>Cash Funds</b>				
Bank accounts	31,440	77,155	108,595	90,007
<b>Total cash funds</b>	<u><b>31,440</b></u>	<u><b>77,155</b></u>	<u><b>108,595</b></u>	<u><b>90,007</b></u>
<b>Assets retained for Charity's own use (at cost)</b>				
Laptops/printer	7,512	-	7,512	7,512
Other equipment	2,880	-	2,880	2,880
Furniture	1,670	-	1,670	1,670
<b>Total own use assets</b>	<u><b>12,063</b></u>	<u><b>-</b></u>	<u><b>12,063</b></u>	<u><b>12,063</b></u>
<b>Liabilities</b>				
Independent examination creditor	-	1,733	1,733	1,650
WCVA Loan	-	7,788	7,788	9,107
Other creditors	-	-	-	-
<b>Total liabilities</b>	<u><b>-</b></u>	<u><b>9,521</b></u>	<u><b>9,521</b></u>	<u><b>10,757</b></u>

The trustees confirm, in accordance with the Charitable Incorporated Organisations (General) Regulations 2012, that at the year end the CIO did not have any outstanding guarantees to third parties nor any debts secured on assets of the CIO.

Approved by the trustees on 12th of September and signed on their behalf by:



.....  
Lyndon Watkins, Chair

**ELEVATE**

England & Wales - Charity number 1163004

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# Accounts

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# elevate

Raising Skills, Lifting Aspirations, Improving Community

# TRUSTEES ANNUAL REPORT & FINANCIAL STATEMENTS

YE 31 MARCH 2023

## Chairman Summary

As we watch the calendar reset again, it is with great pride that I reflect upon the achievements of the Elevate family

We're all living in the most challenging times, with societal pressures increasing almost exponentially especially for those we choose to serve.

Demand for our services continues to provide a challenge that we will always endeavour to overcome, as we continue to support the wellbeing needs and increasingly complex mental health of young people within our community.

Again, I wish to thank each and every one of our dedicated youth volunteers, staff volunteers, staff members and fellow board members for their continued commitment to our mission and their unwavering support of the future generations

It is also, with great thanks, that I recognise our financial supporters, without whom, Elevate would cease to provide such an excellent and needed service to those who increasingly rely upon us.

Lyndon Watkins  
Chairman of the Board of Trustees



## **SECTION 1**

**Charity Name:** ELEVATE

**Charity Number:** 1163004

**Charity Address:** The Business Centre  
Cardiff House  
Cardiff Rd  
Barry  
CF63 2AW

### **TRUSTEES:**

Lyndon Watkins	CHAIR/CFO
Mark Nickerson	Volunteer Support
Dave Williams	Secretary/Staff Support

### **ADVISORS**

Jo Daley	MOE Coach Trainer
HSBC Bank Haines Watts Wales LLP.	Community Banking Independent Examiner

### **SENIOR STAFF**

Kantz Misra	Project Director
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## SECTION 2

GOVERNING DOCUMENT	The charity is governed by constitution adopted in Aug 2015
STATUS	The Charity is a CIO
TRUSTEE SELECTION	Appointed / reappointed by a trustee board annually

### ADDITIONAL GOVERNANCE

The charity has the following policies in place:

Safeguarding Policy	Annually Reviewed
Health & Safety Policy	Annually Reviewed
Flexible Working Policy	Annually Reviewed
Bullying & Harassment Policy	Annually Reviewed
Lone Workers Policy	Annually Reviewed
Home Working Policy	Annually Reviewed
Performance and Appraisal Policy	Annually Reviewed
Social Media Policy	Annually Reviewed
Adverse Weather Policy	Annually Reviewed
Staff Expenses Policy	Annually Reviewed
Substance Abuse Policy	Annually Reviewed
Volunteer Policy	Annually Reviewed
Volunteer Expenses Policy	Annually Reviewed
Environmental Statement	Annually Reviewed
Financial Controls Policy	Annually Reviewed
Time off For Dependents Guidance	
Staff Handbook	

All policies are reviewed. DBS checks are carried out on all staff and volunteers who will work with young people.

The Project Director is a member of the British Psychological Society to keep informed of evidence-based developments in the field of well-being.

The Project Director is a member of the Special Group in Coaching Psychology part of the British Psychological Society.

The Charity works closely with the University of South Wales.

The Charity is a member of the Glamorgan Voluntary Services organisation.

The Charity works collaboratively with local statutory services.

The charity is an organisational member of the Association of Coaching.

All the Charity Trustees operate in a voluntary capacity.

## SECTION 3

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

To act as a resource for young people up to the age of 21 in particular but not exclusively living in the Vale of Glamorgan by providing advice and assistance and organising programmes of physical, educational, and other activities.

Summary of the Main Activities Undertaken for the public benefit in relation to the objects:

In planning and delivering our activities for the reporting period outlined above, the trustees kept in mind the Charity Commissions guidance on public benefit at our trustee meetings.

The focus of our activities is on the well-being and engagement of young people at risk of disengaging with the education. We provided one-to-one coaching interventions to referred young people. These programmes benefit the young person in developing their self-agency in dealing with the barriers they face in engagement. In addition, it develops their self-confidence, resilience, optimism, and social skills. The interventions provide young people with a safe space to discuss their life goals, personal issues, and their perceived barriers, encouraging them to be solutions focussed and future orientated. They are enriched by the experience and develop coping strategies and solutions to self-regulate.

Programmes are delivered by staff, and by trained volunteers from the community, near peer volunteers (these are young people closer to the age of the young people they will be coaching) and undergraduates.

The charity receives and welcomes referrals regardless of gender, ethnicity, faith, personal background, and sexuality.

A great contribution is made by trained volunteers, who give up their time to deliver hours of one-to-one coaching. In this space they actively listen, ask challenging questions, and create rapport that allows open and honest discussion and solutions to be found to the barriers the beneficiary faces. We are extremely grateful to our volunteers and staff. They approach the support provided with enthusiasm, and genuine interest in supporting the young person they are matched with.

The charity relies on grant funding to carry out its activities and is consistently seeking funding streams to support and expand its work.

## **SECTION 4**

### **PROJECT BACKGROUND, ACHIEVEMENTS AND PERFORMANCE**

The following is a summary of the report submitted by the project director:

#### **A) Background Outline**

- The project focus for this reporting year was to be on Near Peer Coaching. During the autumn term of 2022, schools primarily in Cardiff and the Vale of Glamorgan requested Near Peer Coaching support.
- The project worked with 17 secondary schools in the Vale of Glamorgan, and Cardiff between April 2022 to March 2023.
- Staff carried out in-schools one-to-one work from April 2022 to March 2023. External volunteers returned to in-schools work in January 2023.
- Data collection was affected by not receiving data from schools in the January 2023 to March 2023 in time for this report, therefore data for one-to-one coachee could not be collected in some cases. What is presented here is data collected from those that did feedback, and were able to do so, via electronic form submission or via in-school submission. Elevate collect pre-test, post-test data with one-to-one beneficiaries. We changed our pre-test, post-test measures in September 2020, to the Muris Self-Efficacy assessment, and the Rosenberg Self-Esteem assessment. Both are internationally recognized psychometrics the former specifically for young people. The project director is qualified as a British Psychological Society educational tester.

#### **B) One to One Coaching**

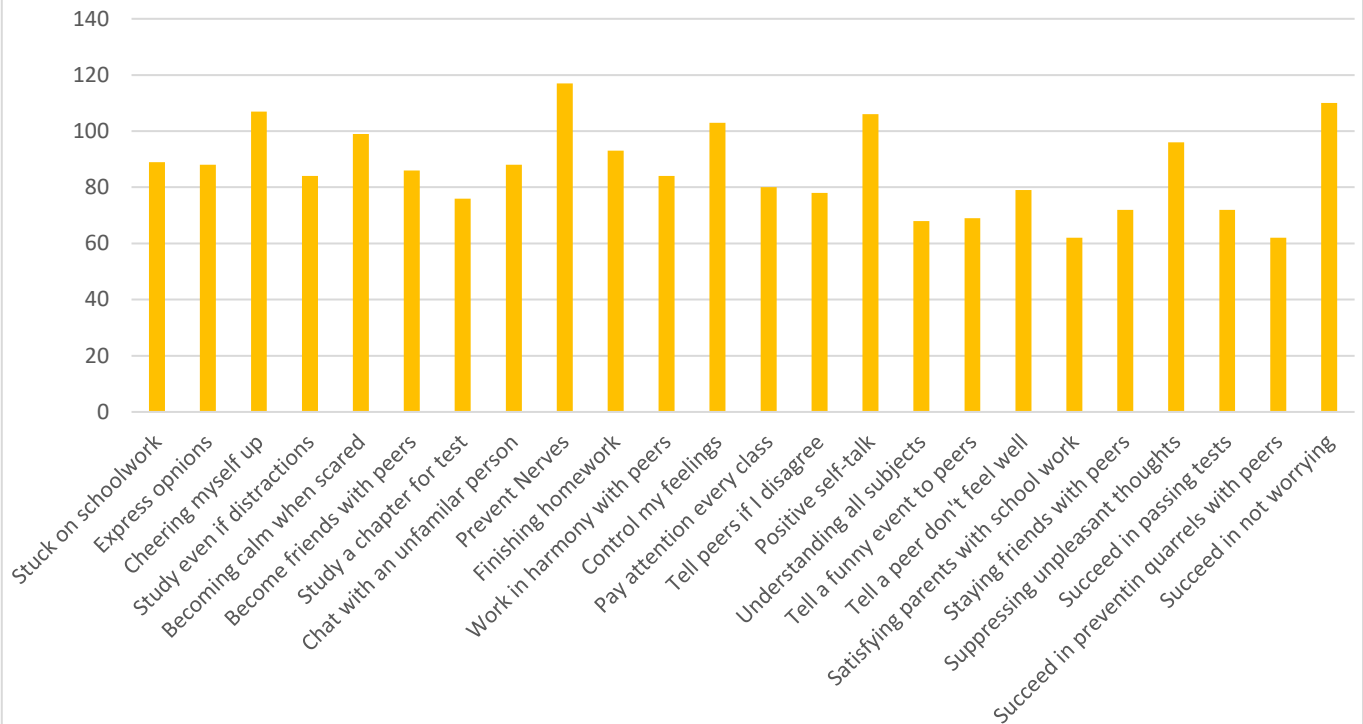
Elevate continued to offer its one-to-one coaching service.

All the beneficiaries referred to the coaching programme are identified by the school as requiring a more-focussed approach. Due to COVID-19, many schools saw an increase of referrals to mental health and well-being services for young people. Elevate took the decision to provide well-being coaching support to those referred to the counselling and CAHMS waitlists who had more complex mental health needs. In some schools counselling services still had not been resumed and therefore due to both these presenting conditions referrals to Elevate were significantly higher than previous years for one-to-one support. To meet demand, Elevate continued its contract with a freelance coach. All the beneficiaries put forward are given an opportunity to identify what it is that they want to see positively change in their lives because of the coaching relationship.

In the two terms the coaching service served 230 young people referred. Attendance of beneficiaries ranged from 89%-100% on our coaching programme. We received data from 171.

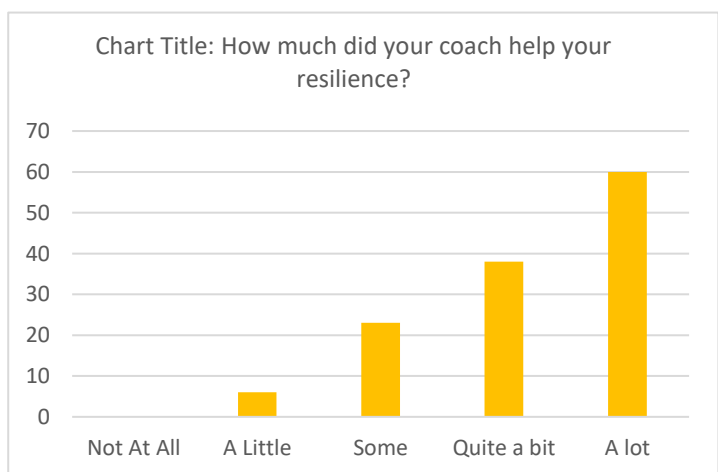
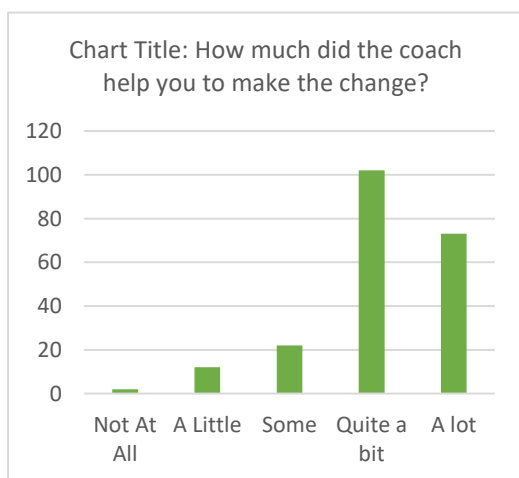
The coaching helped the clients to increase their sense of positivity, emotional self-regulation, thinking skills in managing their own mental health and associated behaviours. Clients stated that coaching helped them with their resilience, with the majority self-reporting increases in self-confidence and that the coach played a significant role in helping to bring about these changes. An assessment was carried out as to which coaching behaviours (behaviour of the coach) was most helpful. 91% found that the coach offering a non-judgemental space was useful. 93% responding that the coach listening and communicating well was really useful. Other significant behaviours that helped was that the coach was motivating, encouraging, and in showing clients the ability to be more accepting of self.

Chart Showing Pupil Change in MURIS SELF-EFFICACY Categories Post One-To-One Coaching Programme

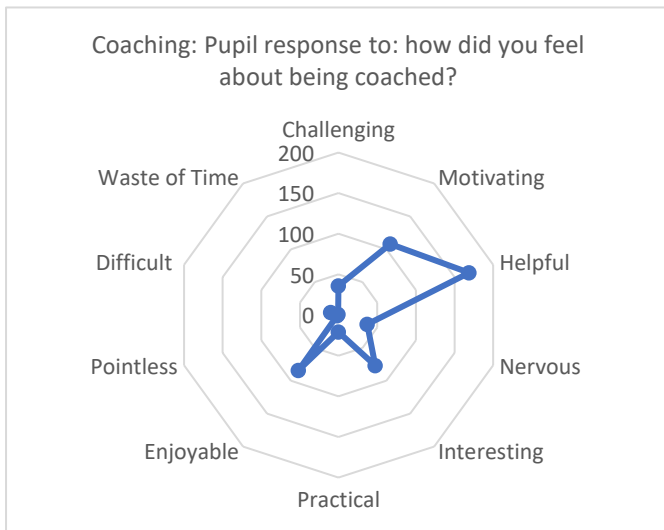


Qualitative data showed most clients found the intervention improved their positivity, their thinking, and their emotions.

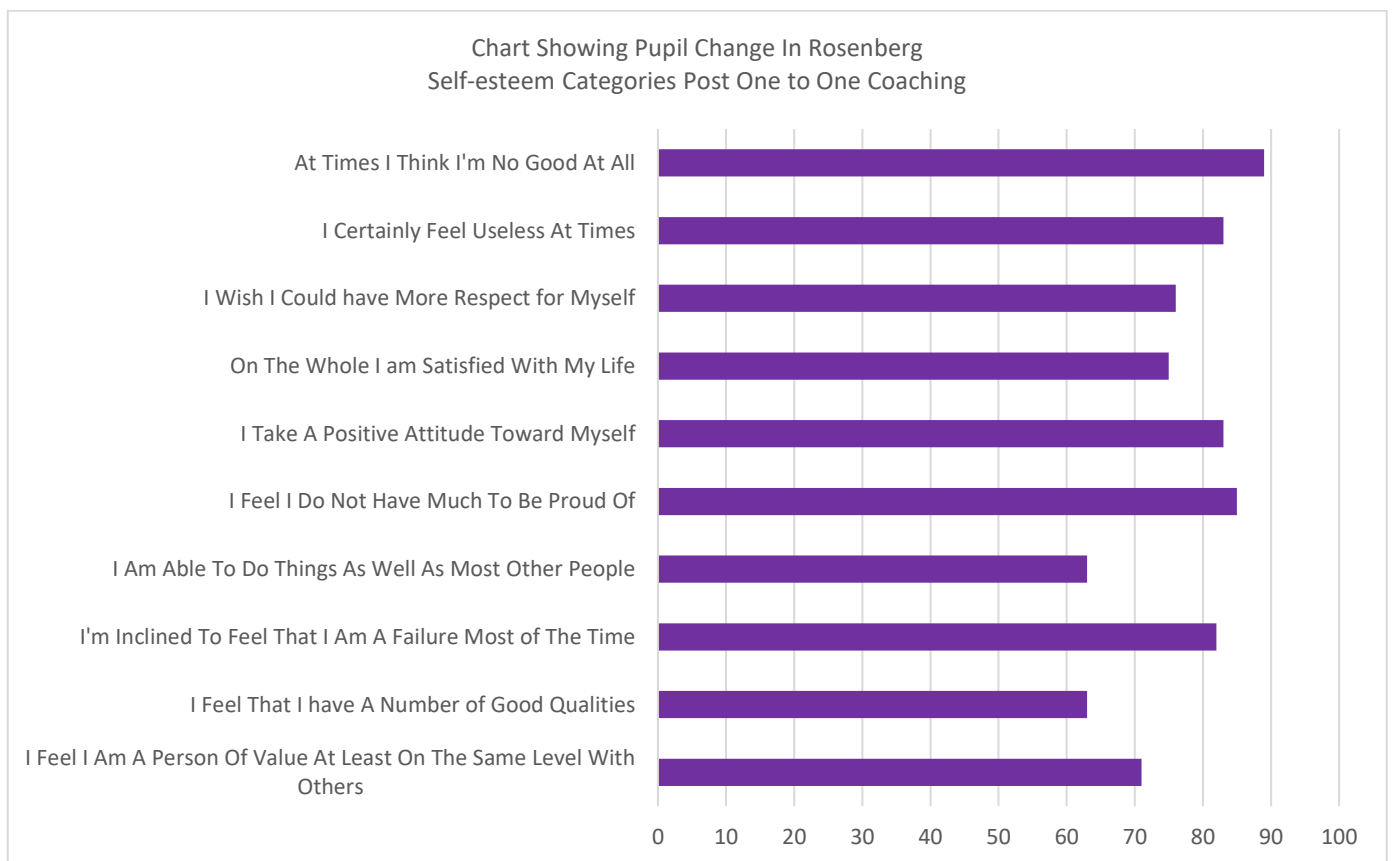
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient.



This surface radar and bar chart below suggests that the coaching relationship was helpful, motivating and most beneficiaries found it good to excellent.



The project also measured self-esteem data using the Rosenberg Self-Esteem Scale. Most reported an improvement in being prouder of themselves, able to do as well as other people and in having more respect for self. Of those that Elevate were able to collect data from, 73% reported an increase in their self-esteem.



### C) Near Peer Coaching

The Near Peer Coaching project works to build the capacity of schools to provide well-being coaching for young people who are identified as having mild to moderate well-being needs. The project works to train older pupils who apply through their school systems to become Near Peer Coaches. The project was initially piloted as result of ideas coming out of the schools, from staff and our beneficiaries. Young people fed-back that pupils in schools feel more comfortable talking to their peers and would value a listening peer, who was skilled in supporting them. The pilot proved successful, and the Near Peer Coaching project was

awarded funding by TNL Community Fund to grow into the Cardiff and Vale areas. The aim for the charity is to put a Near Peer Coach in every secondary school in Wales. When consulting schools in Cardiff and the Vale, they were interested in having the project in their schools as soon as possible. We started Near Peer Coaching work in September 2022 and continued it until March 2023. From Sept 2023 to March 2023, we trained 191 near peer coaches across secondary schools in the Vale, Cardiff and 5 university near peer coaches, whom we matched with beneficiaries in schools in Cardiff.

Near Peer university coaches were asked about their experience, and reported back positively about their voluntary activity. They were well supported and resourced.

University volunteers coached 25 young people. Exit data for all beneficiaries could not be gathered in time for this annual report.

## **D) FINAL COMMENTS**

This report covers activity with beneficiaries from April 2022 to March 2023 in its report. The charity has already received enquiries from more schools about its Near Peer Coaching programmes, including primary schools.

## **SECTION 5**

### **FUTURE PLANS**

The charity will continue to deliver its current grant funded activities.

The trustees champion the further development of the Near Peer Coaching programme and continue to believe this will enable the charity to widen its reach cost effectively. The Near Peer programme works to train in-school coaches in core coaching skills and builds capacity for the schools to provide well-being intervention, these older pupils are then matched with younger people that the school identifies as in need of support. The charity has used WCVA resilience funding to develop its near peer programme professionally and expand it to create a 'social enterprise' model of income. This fund has also allowed the charity to develop an online presence with accredited training courses and a group well-being resource, linked to the new Welsh Curriculum Area of Learning and Experience in Health & Wellbeing. The charity intends to charge for these products as a source of income.

The charity is looking at sources of income through coach training, it has been accredited for its training programme by the Association for Coaching. The aim of accreditation is to monetise the charities offerings and create a more self-sustainable model. The charity will work closely with Elevate Coaching Services Ltd, which provides training and support for adult clients and generates income from non-grant funded activity. Elevate Coaching Services Ltd has agreed to donate 10% of pre-tax profits to the charity.

The charity is in dialogue with the Looked After Children department of the local authorities in Cardiff, and with primary schools in Cardiff. It envisages a Near Peer Coaching programme for these sectors in the future and will actively seek funding for potential projects serving primary schools and looked after children.

The charity continues to be engaged in research collaboration. The charity continues to be involved with the Special Group in Coaching Psychology, an interest group in the British Psychological Society, and the international Coaching in Education group, made up of representatives of various universities.

## **FINANCIAL REVIEW & RESERVES POLICY**

### **Financial Year from April 2022 – March 2023**

In the year ended 31 March 2023, the charity activities saw a recovered demand for its work. To meet the increased demand for services as schools go through a recovery period from the pandemic, the charity continued to take on the services of a freelancer. The National Lottery Community fund received an additional £94,320 and an income of £10,042 was received from our training programmes and donations.

For a full operational year, the annual costs (all restricted) of £113,471 (2022: £110,327) gave a year-end restricted fund of £90,007 (2022: £98,301).

Although the grants have provided restricted working capital, the charity's year-end reserves (unallocated, unrestricted funds) of £9932 are obviously inadequate to fund working capital for future work-streams. The charity's aim is, through fundraising and primary-purpose trading, to build up reserves of at least £20,000 to provide general working capital.

This trustees' annual report was approved by the trustees on the 13th of November 2023 and signed on their behalf by;

A handwritten signature in black ink, appearing to read 'Lyndon Watkins', enclosed within a large, loopy oval shape.

Lyndon Watkins, Chair

## **Independent Examiner's Report to the Trustees of Elevate**

I report to the Charity Trustees on my examination on the accounts for the year ended 31 March 2023.

### **Responsibilities and basis of report**

As the Charity Trustees of the Charitable Incorporated Organisation, 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 Charitable Incorporated Organisation's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all 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 in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records

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



Mr Clive Edwards FCA  
Haines Watts Wales LLP  
7 Neptune Court  
Vanguard Way  
Cardiff  
CF24 5PJ

21 November 2023

## Elevate Receipts and Payments Accounts: Year ending 31 March 2023

	Unrestricted Funds	Restricted Funds	Total for Year	
	£	£	2022/23	2021/22
Receipts	£	£	£	£
Donations	0	12	12	11
National Lottery Community Fund	-	94,320	94,320	91,450
WCVA Grant	-	-	-	5,464
Training	9,932	-	9,932	-
Other income	-	-	-	2,102
Bank interest	-	-	-	7
	9,932	94,332	104,263	99,033
<b>Asset and investment sales</b>				
Loans/Deposit Accounts	282	632	914	-
Loans received from WCVA	-	-	-	1,821
Total receipts	9,932	94,332	105,177	100,854
<b>Payments</b>				
Staff	-	75,975	75,975	79,393
Service delivery	-	23,214	23,214	11,572
Promotion/Marketing & Advertising	-	1,011	1,011	5,059
Administration	-	13,271	13,271	14,303
	-	-	-	-
Total payments	-	113,471	113,471	110,327
Net of receipts/(payments)	9,932	(19,140)	(8,294)	(9,473)
Cash funds last year end	110	98,192	98,301	107,774
<b>Cash funds this year end</b>	<b>10,042</b>	<b>79,052</b>	<b>90,007</b>	<b>98,301</b>

## Statement of Assets and Liabilities as at 31 March 2023

### Cash Funds

Bank accounts	10,042	79,052	90,007	107,774
<b>Total cash funds</b>	<b>10,042</b>	<b>79,052</b>	<b>90,007</b>	<b>107,774</b>

### Assets retained for Charity's own use (at cost)

Laptops/printer	7,512	-	7,512	7,512
Other equipment	2,880	-	2,880	472
Furniture	1,670	-	1,670	458
<b>Total own use assets</b>	<b>12,063</b>	<b>-</b>	<b>12,063</b>	<b>8,442</b>

### Liabilities

Independent examination creditor	-	1,650	1,650	1,500
WCVA Loan	-	9,107	9,107	7,285
Other creditors	-	-	-	-
<b>Total liabilities</b>	<b>-</b>	<b>10,757</b>	<b>10,757</b>	<b>8,785</b>

The trustees confirm, in accordance with the Charitable Incorporated Organisations (General) Regulations 2012, that at the year end the CIO did not have any outstanding guarantees to third parties nor any debts secured on assets of the CIO.

Approved by the trustees on 13th of November 2023 and signed on their behalf by:



Lyndon Watkins, Chair

**ELEVATE**

England & Wales - Charity number 1163004

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# Accounts

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2022

# elevate

Raising Skills, Lifting Aspirations, Improving Community

# TRUSTEES ANNUAL REPORT & FINANCIAL STATEMENTS

YE 31 MARCH 2022

## Chairman Summary

The global COVID-19 pandemic has had a significant impact on young people. As we move into a post-pandemic world, Elevate and many other organisations that serve our young people, whether statutory or voluntary have experienced and continue to experience an increased demand for their services.

We continue to focus on the wellbeing and engagement of young people who are self-reporting with higher levels of mental-health needs. Our school and local authority partners endeavour to meet these needs in an increasingly difficult financial climate. There is requirement for those with access to funding to increase the support for mental health needs of young people organisations like us serve, whom have been clearly affected by the pandemic.

It is incredible how dedicated our youth volunteers have been in supporting their younger peers. They deliver much needed in-school support to alleviate the demand placed on wellbeing systems and services such as CAMHS. I thank them, and our staff for their commitment to a cause that is rooted in improving the wellbeing of future generations.

The data reporting in this Annual Report though limited by the effects of the pandemic, clearly show the impact the charity has on its service users, and no doubt the positive impact this has beyond the direct beneficiaries.

We the board, the volunteers and staff are working to see Elevate expand our area of operations, so the invaluable work this charity does is available for more and more young people.

Finally, thank you to our financial supporters, without whom, Elevate would cease to provide such excellent and much needed support to those who increasingly need it.



Lyndon Watkins  
Chairman of the Board of Trustees

## **SECTION 1**

**Charity Name:** ELEVATE

**Charity Number:** 1163004

**Charity Address:** The Business Centre  
Cardiff House  
Cardiff Rd  
Barry  
CF63 2AW

### **TRUSTEES:**

Lyndon Watkins	CHAIR/CFO
Mark Nickerson	Volunteer Support
Dave Williams	Secretary/Staff Support

### **ADVISORS**

Jo Daley	MOE Coach Trainer
HSBC Bank Haines Watts Wales LLP.	Community Banking Independent Examiner

### **SENIOR STAFF**

Kantz Misra	Project Director
-------------	------------------

## SECTION 2

GOVERNING DOCUMENT	The charity is governed by constitution adopted in Aug 2015
STATUS	The Charity is a CIO
TRUSTEE SELECTION	Appointed / reappointed by a trustee board annually

### ADDITIONAL GOVERNANCE

The charity has the following policies in place:

Safeguarding Policy	Annually Reviewed
Health & Safety Policy	Annually Reviewed
Flexible Working Policy	Annually Reviewed
Bullying & Harassment Policy	Annually Reviewed
Lone Workers Policy	Annually Reviewed
Home Working Policy	Annually Reviewed
Performance and Appraisal Policy	Annually Reviewed
Social Media Policy	Annually Reviewed
Adverse Weather Policy	Annually Reviewed
Staff Expenses Policy	Annually Reviewed
Substance Abuse Policy	Annually Reviewed
Volunteer Policy	Annually Reviewed
Volunteer Expenses Policy	Annually Reviewed
Environmental Statement	Annually Reviewed
Financial Controls Policy	Annually Reviewed
Time off For Dependents Guidance	
Staff Handbook	

All policies are reviewed. DBS checks are carried out on all staff and volunteers who will work with young people.

The Project Director is a member of the British Psychological Society to keep informed of evidence-based developments in the field of well-being.

The Project Director is a member of the Special Group in Coaching Psychology part of the British Psychological Society.

The Charity works closely with the University of South Wales.

The Charity is a member of the Glamorgan Voluntary Services organisation.

The Charity works collaboratively with local statutory services.

The Charity works collaboratively with the MOE Foundation – Coach training organisation.

The charity is an organisational member of the Association of Coaching.

All the Charity Trustees operate in a voluntary capacity.

## SECTION 3

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

To act as a resource for young people up to the age of 21 in particular but not exclusively living in the Vale of Glamorgan by providing advice and assistance and organising programmes of physical, educational, and other activities.

Summary of the Main Activities Undertaken for the public benefit in relation to the objects:

In planning and delivering our activities for the reporting period outlined above, the trustees kept in mind the Charity Commissions guidance on public benefit at our trustee meetings.

The focus of our activities is on the well-being and engagement of young people at risk of disengaging with the education. We provided one-to-one coaching interventions to referred young people. These programmes benefit the young person in developing their self-agency in dealing with the barriers they face in engagement. In addition, it develops their self-confidence, resilience, optimism, and social skills. The interventions provide young people with a safe space to discuss their life goals, personal issues, and their perceived barriers, encouraging them to be solutions focussed and future orientated. They are enriched by the experience and develop coping strategies and solutions to self-regulate.

Programmes are delivered by staff, and by trained volunteers from the community, near peer volunteers (these are young people closer to the age of the young people they will be coaching) and undergraduates.

The charity receives and welcomes referrals regardless of gender, ethnicity, faith, personal background, and sexuality.

A great contribution is made by trained volunteers, who give up their time to deliver hours of one-to-one coaching. In this space they actively listen, ask challenging questions, and create rapport that allows open and honest discussion and solutions to be found to the barriers the beneficiary faces. We are extremely grateful to our volunteers and staff. They approach the support provided with enthusiasm, and genuine interest in supporting the young person they are matched with.

The charity relies on grant funding to carry out its activities and is consistently seeking funding streams to support and expand its work.

## SECTION 4

### PROJECT BACKGROUND, ACHIEVEMENTS AND PERFORMANCE

The following is a summary of the report submitted by the project director:

#### A) Background Outline

- The project focus for this reporting year was to be on Near Peer Coaching. During the autumn term of 2021, schools primarily in Cardiff and the Vale of Glamorgan requested Near Peer Coaching support.
- The project worked with 17 secondary schools in the Vale of Glamorgan, Cardiff and RCT between April 2021 to March 2022.
- Staff resumed the in-schools one-to-one work from April 2021 to March 2022. Due to COVID-19 external volunteers did not return to in-schools work until January 2022.
- Data collection was affected by COVID-19, data from every one-to-one coachee could not be collected. What is presented here is data collected from those that did feedback, and were able to do so, via electronic form submission or via in-school submission. Elevate collect pre-test, post-test data with one-to-one beneficiaries. We changed our pre-test, post-test measures in September 2020, to the Muris Self-Efficacy assessment, and the Rosenberg Self-Esteem assessment. Both are internationally recognized psychometrics the former specifically for young people. The project director is qualified as a British Psychological Society educational tester.

PLEASE NOTE THE FIGURES IN THIS REPORT WERE AFFECTED BY COVID-19. THE CHARITY COULD NOT COLLECT EXIT DATA FOR A NUMBER OF CLIENTS AND VOLUNTEERS DUE TO ONGOING COVID ISSUES

#### B) One to One Coaching

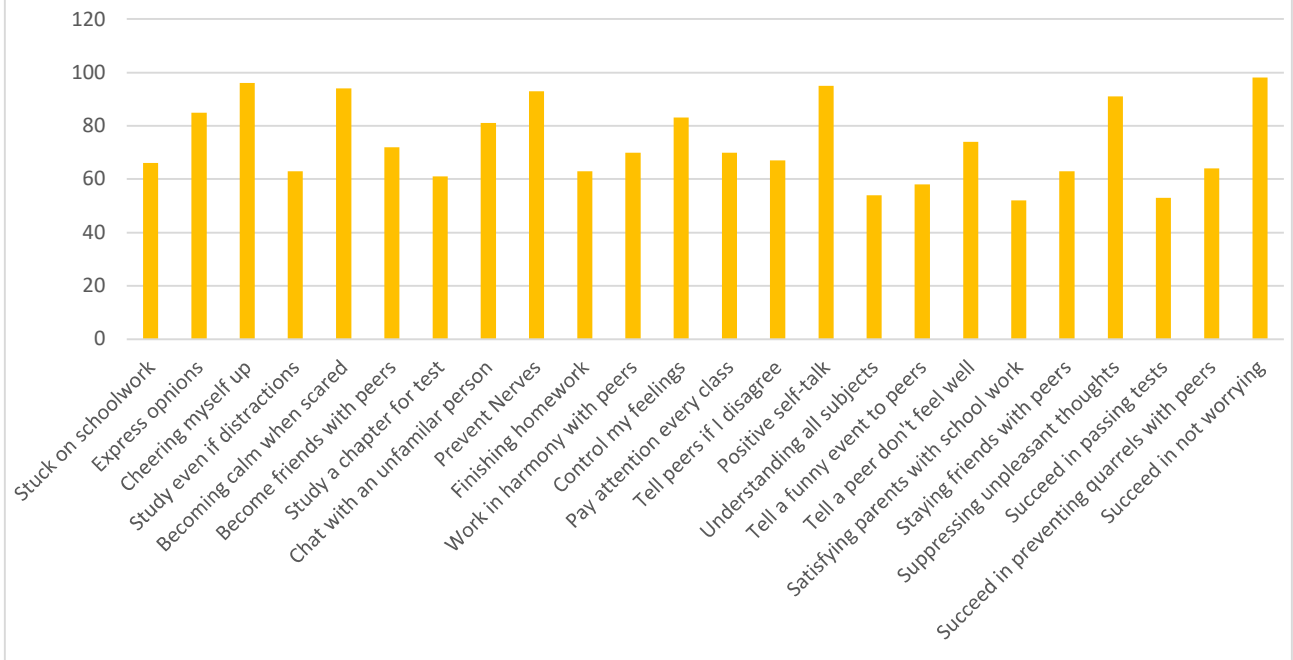
Elevate continued to offer its one-to-one coaching service.

All the beneficiaries referred to the coaching programme are identified by the school as requiring a more-focussed approach. Due to COVID-19, many schools saw an increase of referrals to mental health and well-being services for young people. Elevate took the decision to provide well-being coaching support to those referred to the counselling and CAHMS waitlists who had more complex mental health needs. In some schools counselling services had not been resumed and therefore due to both these presenting conditions referrals to Elevate were significantly higher than previous years for one-to-one support. To meet demand, Elevate contracted a freelance coach from January 2022. All the beneficiaries put forward are given an opportunity to identify what it is that they want to see positively change in their lives because of the coaching relationship.

In the three terms the coaching service served 161 young people referred, of these 37% were male, 63% female. We have seen an increase in female clients in the Covid-19 period.

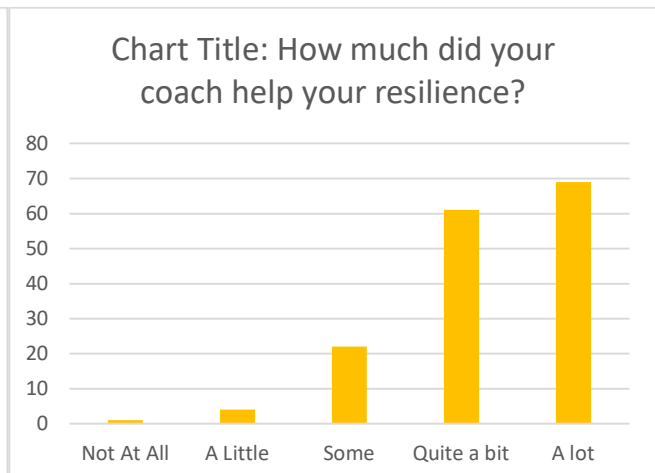
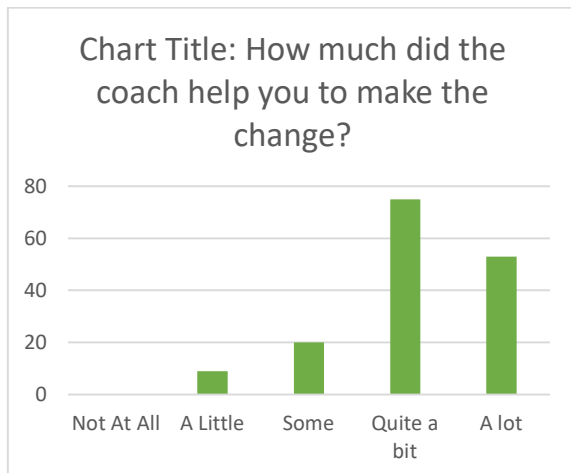
We used the Muris Self-Efficacy scale for young people to measure post-coaching impact. The bar chart below represents changes in self-efficacy per category for 150 of those who completed exit data. Changes reported showed improvements in thinking optimistically, positive-self talk, and worrying less about things (reduction in anxiety). 79.5% reported an improvement in self-efficacy, of these 79% in emotional self-efficacy and social self-efficacy, and 77% in academic self-efficacy. This suggests post coaching beneficiaries reported a higher sense of capability beliefs in managing their emotional, social, and academic situations.

Chart Showing Pupil Change in MURIS SELF-EFFICACY Categories Post One-To-One Coaching Programme

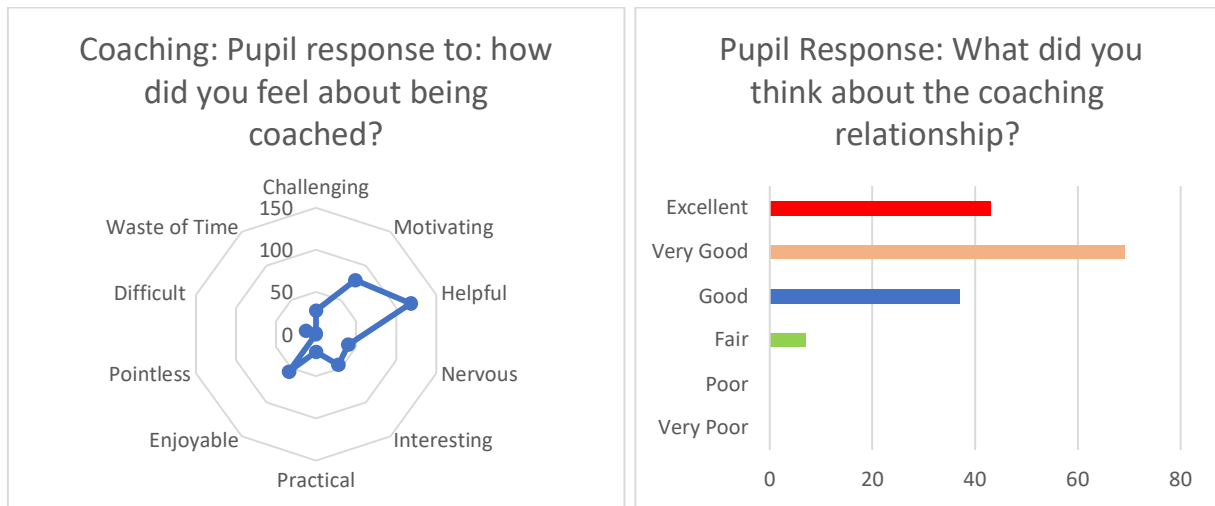


Qualitative data showed most clients found the intervention improved their positivity, their thinking, and their emotions.

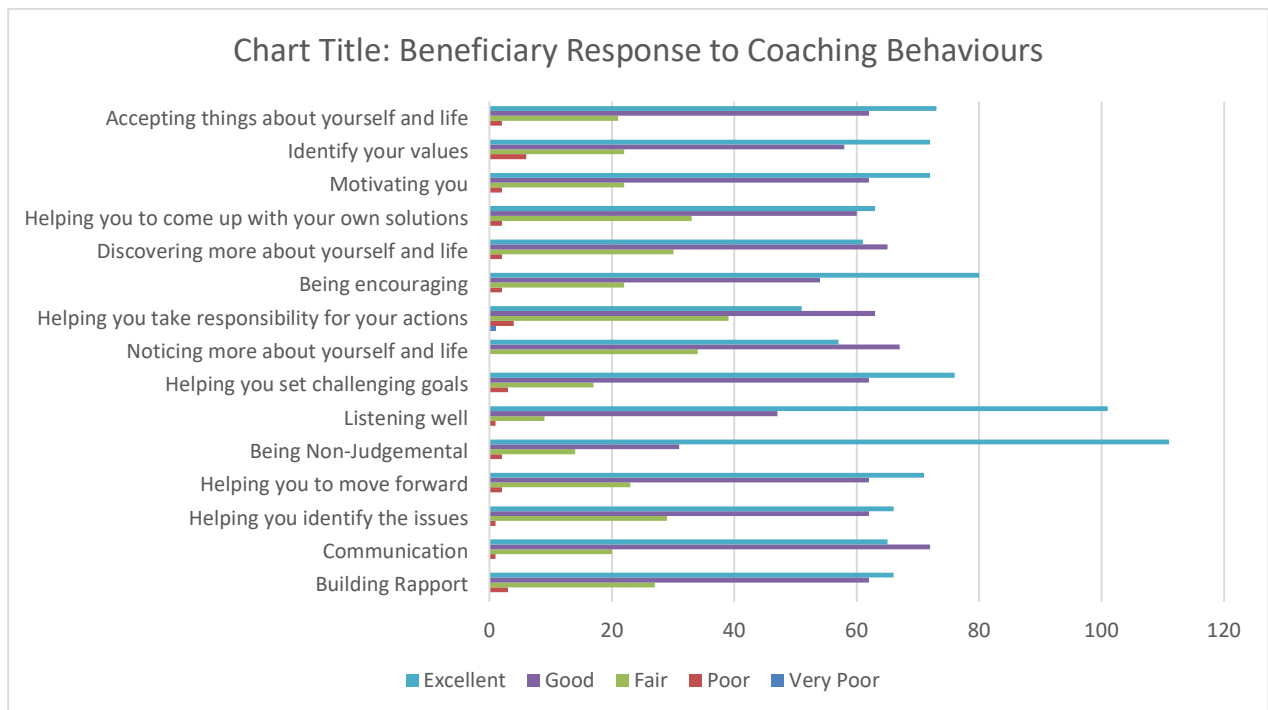
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient.



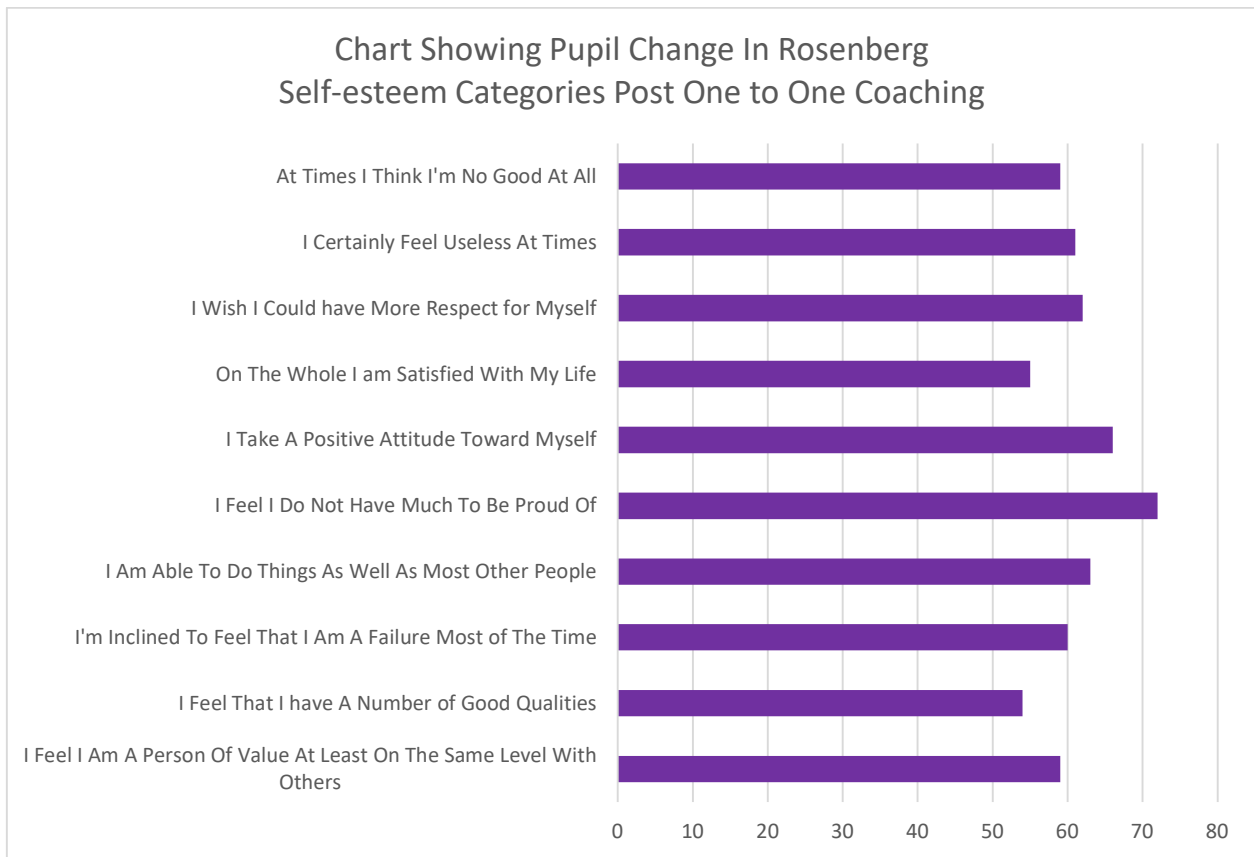
This surface radar and bar chart below suggests that the coaching relationship was helpful, motivating and most beneficiaries found it good to excellent.



We also measured coaching behaviours, and the behaviours that are rated highly by the beneficiaries (meaning that these were the behaviours they found most useful). These were being encouraging, non-judgemental, listening well, focus on setting goals and helped the beneficiary create more self-acceptance.



The project also measured self-esteem data using the Rosenberg Self-Esteem Scale. Most reported an improvement in being prouder of themselves, able to do as well as other people and in having more respect for self. Of those that Elevate were able to collect data from, 79% reported an increase in their self-esteem.



### C) Near Peer Coaching

The Near Peer Coaching project works to build the capacity of schools to provide well-being coaching for young people who are identified as having mild to moderate well-being needs. The project works to train older pupils who apply through their school systems to become Near Peer Coaches. The project was initially piloted as result of ideas coming out of the schools, from staff and our beneficiaries. Young people fed-back that pupils in schools feel more comfortable talking to their peers and would value a listening peer, who was skilled in supporting them. The pilot proved successful, and the Near Peer Coaching project was awarded funding by TNL Community Fund to grow into the Cardiff and Vale areas. The aim for the charity is to put a Near Peer Coach in every secondary school in Wales. When consulting schools in Cardiff and the Vale, they were interested in having the project in their schools as soon as possible. We started Near Peer Coaching work in September 2021 and continued it until March 2022. From Sept 2021 to March 2022, we trained 168 near peer coaches across secondary schools in the Vale, Cardiff and one on the border of the Vale of Glamorgan in Rhondda-Cynon Taff and 11 university near peer coaches, whom we matched with beneficiaries in schools in Cardiff and the Vale of Glamorgan.

Near Peer university coaches were asked about their experience, and reported back positively about their voluntary activity. They were well supported and resourced.

University volunteers coached 41 young people. Exit data for all beneficiaries could not be gathered in time for this annual report, the exit data will be affected by resurgence of Covid-19.

## **D) FINAL COMMENTS**

This report covers activity with beneficiaries from April 2021 to March 2022 in its report. The charity has already received enquiries from more schools about its Near Peer Coaching programmes, including primary schools. Having received WCVA monies to develop resources, the charity has developed 13 products and had key products translated into the Welsh language.

## **SECTION 5**

### **FUTURE PLANS**

The charity will continue to deliver its current grant funded activities.

The trustees champion the further development of the Near Peer Coaching programme and continue to believe this will enable the charity to widen its reach cost effectively. The Near Peer programme works to train in-school coaches in core coaching skills and builds capacity for the schools to provide well-being intervention, these older pupils are then matched with younger people that the school identifies as in need of support. The charity has used WCVA resilience funding to develop its near peer programme professionally and expand it to create a 'social enterprise' model of income. This fund has also allowed the charity to develop an online presence with accredited training courses and a group well-being resource, linked to the new Welsh Curriculum Area of Learning and Experience in Health & Wellbeing. The charity intends to charge for these products as a source of income.

The charity is looking at sources of income through coach training, it has been accredited for its training programme by the Association of Coaching and is also a recognised delivery partner for Adult Learning Wales. The aim of accreditation is to monetise the charities offerings and create a more self-sustainable model. The charity will work closely with Elevate Coaching Services Ltd, which provides training and support for adult clients and generates income from non-grant funded activity. Elevate Coaching Services Ltd has agreed to donate 20% of pre-tax profits to the charity.

The charity is in dialogue with the Looked After Children department of the local authorities in the Vale of Glamorgan and Cardiff, and with primary schools in Cardiff. It envisages a Near Peer Coaching programme for these sectors in the future and will actively seek funding for potential projects serving primary schools and looked after children.

The charity continues to be engaged in research collaboration. The charity continues to be involved with the Special Group in Coaching Psychology, an interest group in the British Psychological Society, and the international Coaching in Education group, made up of representatives of various universities.

**FINANCIAL REVIEW & RESERVES POLICY**  
**Financial Year from April 2021 – March 2022**

In the year ended 31 March 2022, the COVID-19 pandemic had some effect on charity activities but the charity towards the end of the financial year was seeing a recovered demand for its work. To meet the increased demand for services as schools go through a recovery period from the pandemic, the charity took on the services of a freelancer. The National Lottery Community fund received an additional £91,450 and the remaining part loan part grant of £1,821 was received from the WCVA. Unrestricted income received was £2,115.

For a full operational year, the annual costs of £110,327 (2021: £71,154) gave a year-end restricted fund of £98,192 (2021: £98,301) and unrestricted fund of £110 (2021: 97).

Although the grants have provided restricted working capital, the charity's year-end reserves (unallocated, unrestricted funds) of £110 are obviously inadequate to fund working capital for future work-streams. The charity's aim is, through fundraising and primary-purpose trading, to build up reserves of at least £5,000 to provide general working capital.

This trustees' annual report was approved by the trustees on 12th November 2022 and signed on their behalf by:

A handwritten signature in black ink, appearing to read 'Lyndon Watkins', written over a faint horizontal line.

Lyndon Watkins, Chair

**Independent Examiner's Report to the Trustees of  
Elevate**

I report to the Charity Trustees on my examination on the accounts for the year ended 31 March 2022.

**Responsibilities and basis of report**

As the Charity Trustees of the Charitable Incorporated Organisation, 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 Charitable Incorporated Organisation's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all 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 in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records

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



Mr Clive Edwards FCA  
Haines Watts Wales LLP  
7 Neptune Court  
Vanguard Way  
Cardiff  
CF24 5PJ

22nd November 2022

## Elevate - Receipts and Payments Accounts: year ending 31 March 2022

	Unrestricted Funds	Restricted Funds	Total for Year	
	£	£	2021/22 £	2020/21 £
<b>Receipts</b>				
Donations	6	5	11	-
National Lottery Community Fund	-	91,450	91,450	97,516
WCVA Grant	-	5,464	5,464	21,856
Other income	2,102	-	2,102	46,733
Bank interest	7	-	7	8
	<u>2,115</u>	<u>96,919</u>	<u>99,033</u>	<u>166,113</u>
<b>Asset and investment sales</b>				
Loans received from WCVA	-	1,821	1,821	7,285
	<u>-</u>	<u>1,821</u>	<u>1,821</u>	<u>7,285</u>
Total receipts	<u>2,115</u>	<u>98,740</u>	<u>100,855</u>	<u>173,398</u>
<b>Payments</b>				
Staff	2,102	77,291	79,393	61,236
Service delivery	-	11,572	11,572	3,251
Promotion/Marketing & Advertising	-	5,059	5,059	1,697
Equipment purchases	-	14,303	14,303	-
Administration	-	-	-	4,970
	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total payments	<u>2,102</u>	<u>108,225</u>	<u>110,327</u>	<u>71,154</u>
Net of receipts/(payments)	13	(9,485)	(9,473)	102,244
Cash funds last year end	97	107,677	107,774	5,530
<b>Cash funds this year end</b>	<u><u>110</u></u>	<u><u>98,192</u></u>	<u><u>98,301</u></u>	<u><u>107,774</u></u>
<b><u>Statement of Assets and Liabilities as at 31 March 2022</u></b>				
<b>Cash Funds</b>				
Bank accounts	110	98,192	98,301	107,774
<b>Total cash funds</b>	<u><u>110</u></u>	<u><u>98,192</u></u>	<u><u>98,301</u></u>	<u><u>107,774</u></u>
<b>Assets retained for Charity's own use (at cost)</b>				
Laptops/printer	7,512	-	7,512	2,391
Other equipment	472	-	472	472
Furniture	458	-	458	279
<b>Total own use assets</b>	<u><u>8,442</u></u>	<u><u>-</u></u>	<u><u>8,442</u></u>	<u><u>3,142</u></u>
<b>Liabilities</b>				
Independent examination creditor	-	1,500	1,500	845
WCVA Loan	-	9,107	9,107	7,285
Other creditors	-	-	-	-
<b>Total liabilities</b>	<u><u>-</u></u>	<u><u>10,607</u></u>	<u><u>10,607</u></u>	<u><u>8,130</u></u>

The trustees confirm, in accordance with the Charitable Incorporated Organisations (General) Regulations 2022 that at the year end the CIO did not have any outstanding guarantees to third parties nor any debts secured against assets of the CIO.

Approved by the trustees on 12th of November 2022 and signed on their behalf by:



Lyndon Watkins, Chair

**ELEVATE**

England & Wales - Charity number 1163004

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# Accounts

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# elevate

Raising Skills, Lifting Aspirations, Improving Community

# TRUSTEES ANNUAL REPORT & FINANCIAL STATEMENTS

## YE 31 MARCH 2021

### Chairman Summary

Resilience - /rɪ'zɪliəns/

noun

the capacity to recover quickly from difficulties; toughness.

"the often remarkable resilience of so many British institutions"

The sector in which Elevate operates is one in which there are often many difficulties and barriers to overcome; the global COVID-19 pandemic was nothing short of the most challenging hurdle which Elevate has faced, both in terms of delivering our services to those in critical need, but also in terms of keeping our valued staff and volunteers safe. I am pleased to report that our staff, both paid and volunteer, demonstrated outstanding professionalism and flexibility to continue service delivery in as many ways as possible.

We retained our focus on the wellbeing and engagement of young people at risk of disengaging with the education at a time where such services are sorely needed through mixed mediums to suit and support the wider communities of the Vale of Glamorgan and surrounding areas.

I would like to single out the amazing contribution made by our stellar volunteers, who deliver much needed support at such a critical time in our service users lives, and once again thank them for their dedication.

Our usual extensive data reporting in this Annual Report will be limited by the effects of the pandemic, which took us out of schools for significant periods of time. That said, the most important aspect of our aims always remained available: supporting those most in need.

As well as our volunteers, our paid staff must be recognised for their exceptional resilience to change and innovating new methods of service delivery, which will help steer future programs and potentially see Elevate expand our area of operations.

Finally, thank you to our financial supporters, without whom, Elevate would cease to provide such excellent and much needed support to those who increasingly need it.



Lyndon Watkins  
Chairman of the Board of Trustees

## **SECTION 1**

**Charity Name:** **ELEVATE**

**Charity Number:** **1163004**

**Charity Address:** **The Business Centre**  
**Cardiff House**  
**Cardiff Rd**  
**Barry**  
**CF63 2AW**

## **TRUSTEES:**

Lyndon Watkins	CHAIR/TREASURER
Mark Nickerson	Volunteer Support
Dave Williams	Secretary/Staff Support

## **ADVISORS**

Jo Daley	MOE Coach Trainer
HSBC Bank Helen Williams	Community Banking Independent Examiner

## **SENIOR STAFF**

Kantz Misra	Project Director
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## SECTION 2

GOVERNING DOCUMENT	The charity is governed by constitution adopted in Aug 2015
STATUS	The Charity is a CIO
TRUSTEE SELECTION	Appointed / reappointed by a trustee board annually

### ADDITIONAL GOVERNANCE

The charity has the following policies in place:

Safeguarding Policy	Annually Reviewed
Health & Safety Policy	Annually Reviewed
Flexible Working Policy	Annually Reviewed
Bullying & Harassment Policy	Annually Reviewed
Lone Workers Policy	Annually Reviewed
Home Working Policy	Annually Reviewed
Performance and Appraisal Policy	Annually Reviewed
Social Media Policy	Annually Reviewed
Adverse Weather Policy	Annually Reviewed
Staff Expenses Policy	Annually Reviewed
Substance Abuse Policy	Annually Reviewed
Volunteer Policy	Annually Reviewed
Volunteer Expenses Policy	Annually Reviewed
Environmental Statement	Annually Reviewed
Financial Controls Policy	Annually Reviewed
Time off For Dependents Guidance	
Staff Handbook	

All policies are reviewed. DBS checks are carried out on all staff and volunteers who will work with young people.

The Project Manager is a member of the British Psychological Society to keep informed of evidence based developments in the field of wellbeing.

The Project Manager is a member of the Special Group in Coaching Psychology part of the British Psychological Society.

The Charity works closely with the University of South Wales.

The Charity is a member of the Glamorgan Voluntary Services organisation.

The Charity works collaboratively with local statutory services.

The Charity works collaboratively with the MOE Foundation – Coaching and Mentoring organisation.

The charity is an organisational member of the Association of Coaching.

All the Charity Trustees operate in a voluntary capacity.

## SECTION 3

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

To act as a resource for young people up to the age of 21 in particular but not exclusively living in the Vale of Glamorgan by providing advice and assistance and organising programmes of physical, educational, and other activities.

Summary of the Main Activities Undertaken for the public benefit in relation to the objects:

In planning and delivering our activities for the reporting period outlined above, the trustees kept in mind the Charity Commissions guidance on public benefit at our trustee meetings.

The focus of our activities is on the wellbeing and engagement of young people at risk of disengaging with the education. We provided one-to-one coaching and mentoring interventions to referred young people and wellbeing group based programmes to young people. These programmes benefit the young person in developing their self-agency in dealing with the barriers they face in engagement. In addition, it develops their self-confidence, resilience, optimism and social skills. The interventions provide young people with a safe space to discuss their life goals, personal issues and their perceived barriers, encouraging them to be solutions focussed and future orientated. They are enriched by the experience, and develop coping strategies and solutions to self-regulate.

Programmes are delivered by staff, and by trained volunteers from the community, near peers (these are young people closer to the age of the young people they will be coaching) and undergraduates.

The charity receives and welcomes referrals regardless of gender, ethnicity, faith, personal background and sexuality.

A great contribution is made by trained volunteers, who give up their time to deliver hours of one-to-one coaching and mentoring. In this space they actively listen, ask challenging questions and create rapport that allows open and honest discussion and solutions to be found to the barriers the young person faces. We are extremely grateful to our volunteers and staff. They approach the support provided with enthusiasm, and genuine interest in supporting the young person they are matched with.

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## SECTION 4

### PROJECT BACKGROUND, ACHIEVEMENTS AND PERFORMANCE

The following is a summary of the report submitted by the project director:

#### A) Background Outline

- The project focus for this reporting year was to be on Near Peer Coaching. However due to COVID-19 service delivery was affected. During the autumn term of 2019, schools primarily in Cardiff and the Vale of Glamorgan requested Near Peer Coaching support.
- **Covid Affected Method:** The project worked with 9 secondary schools in the Vale of Glamorgan and Cardiff between April 2020 to March 2021. All in-school work was suspended from mid-March 2020 to September 2020, and then in November 2020 with the firebreak lockdown, followed by early lockdown pre-Christmas.
- During lockdown, staff worked with referred pupils over Skype on a flexible furlough basis. Until Mar 2020 staff and volunteers worked face to face in schools delivering one-to-one wellbeing coaching.
- Staff resumed this in-schools work from September 2020 to December 2020. Due to COVID-19 restrictions and individual school health and safety assessments, volunteers did not return to in-schools work. This pattern was repeated during Jan 2020 to Mar 2021. Staff worked on a flexible furlough basis.
- Data collection was affected by COVID-19, data from every one-to-one coachee could not be collected. What is presented here is data collected from those that did feedback, and were able to do so, via electronic form submission or via in-school submission. Elevate collect pre-test, post-test data with one-to-one coachees. From Jan 2020-Mar 2020 we used the Butler Self-Image Profile for Adolescents (Butler SIP-A) to collect esteem and aggregate data along with the school life questionnaire (SLQ) which collects self-efficacy data and feedback sheets to collect qualitative data. We changed our pre-test, post-test measures in September 2020, to the Muris Self-Efficacy assessment, and the Rosenberg Esteem assessment.

**PLEASE NOTE THE FIGURES IN THIS REPORT WERE AFFECTED BY COVID-19. THE CHARITY COULD NOT COLLECT EXIT DATA FOR A NUMBER OF CLIENTS AND VOLUNTEERS.**

#### B) One to One Coaching

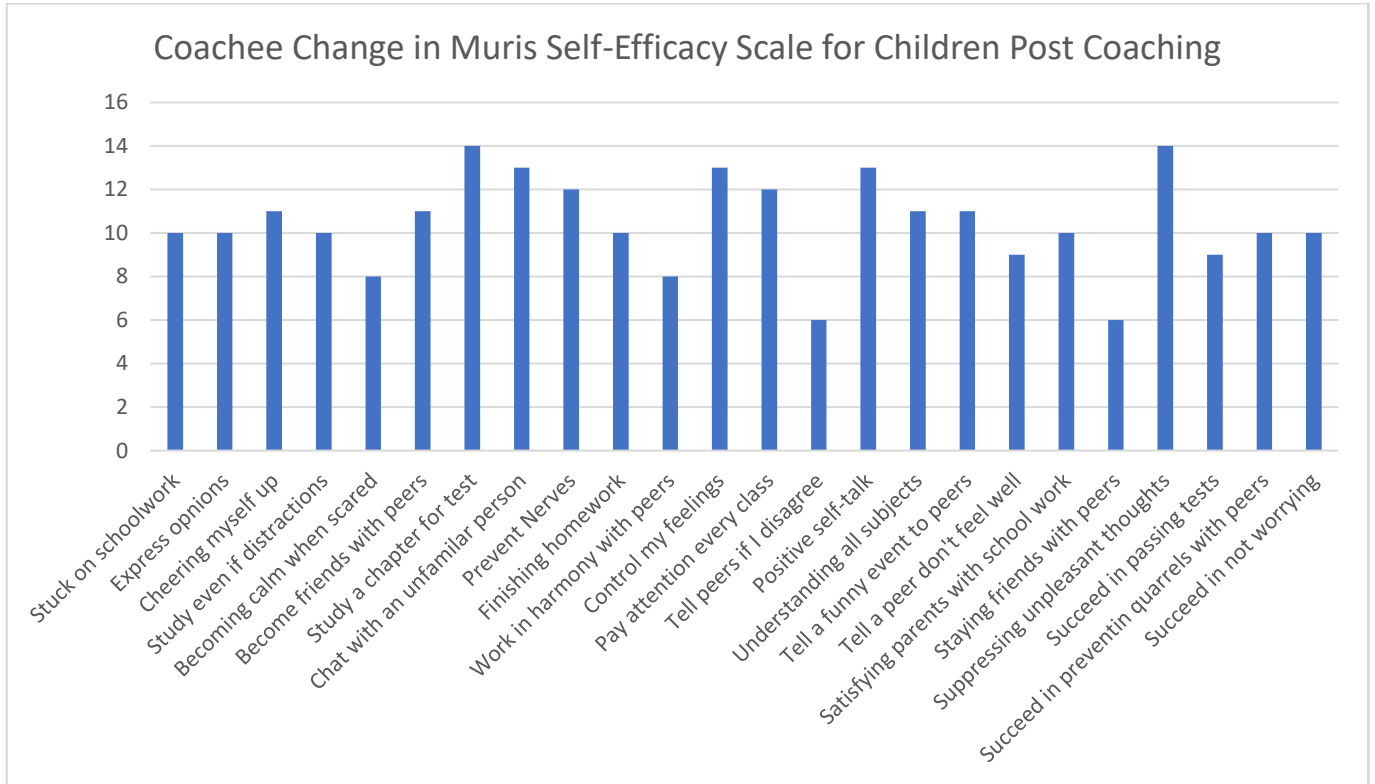
Elevate continued to offer its one-to-one coaching service, as due to social bubbling it's near peer coaching programme was affected. We were not able to utilise volunteers due to COVID-19 restrictions in schools.

All the beneficiaries referred to the coaching programme are identified by the school as requiring a more-focussed approach. Due to COVID-19, many schools saw an increase of referrals to mental health and wellbeing services for young people. Elevate took the decision to provide wellbeing coaching support to those referred to the counselling and CAHMS waitlists who had less complex needs. In some schools counselling services had not been resumed and therefore due to both these presenting conditions referrals to Elevate were significantly higher than previous years for one-to-one support. All the beneficiaries put forward are given an opportunity to identify what it is that they want to see positively change in their lives as a result of the coaching relationship.

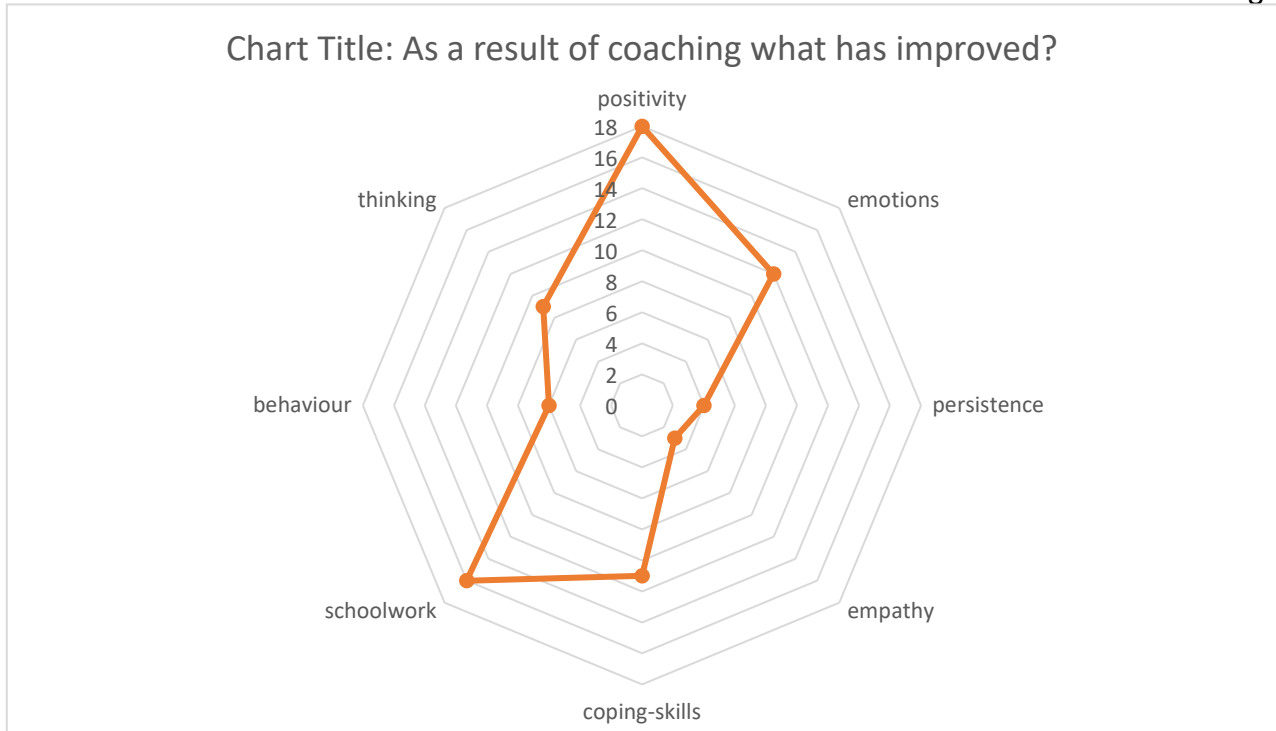
In the three terms the coaching service served 39 young people referred, of these 11 had Skype sessions. Staff operated on a flexible furlough basis. It was difficult to collect data from the Skype

coachees, and when pupils had to self-isolate in our face to face programme. Skype coachee data was analysed in a narrative synthesis format.

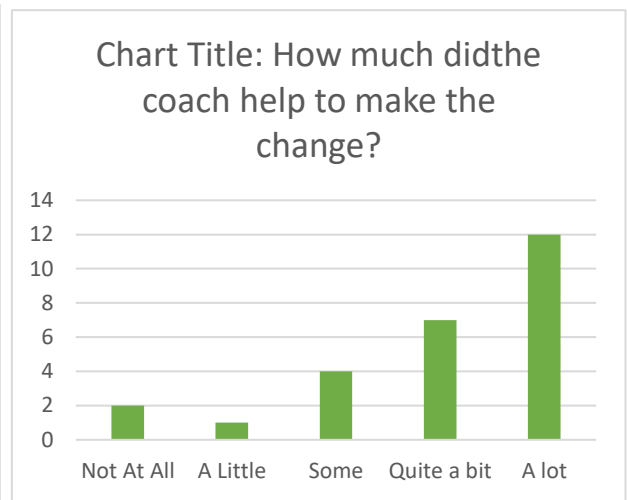
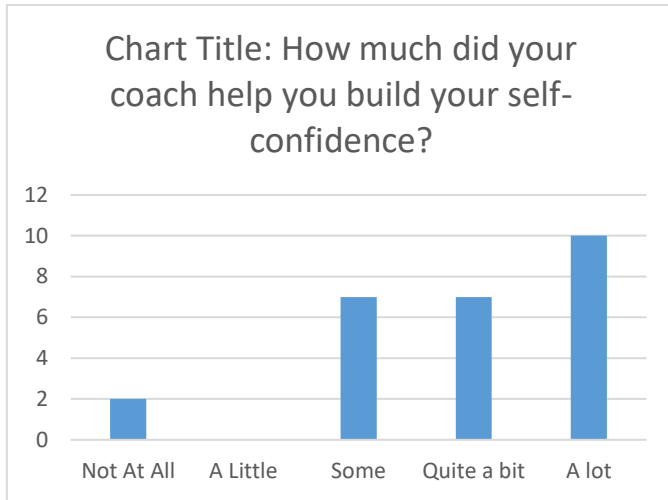
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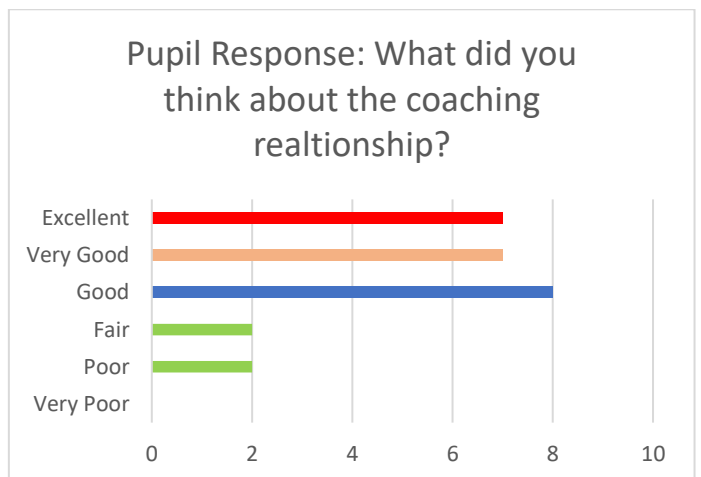
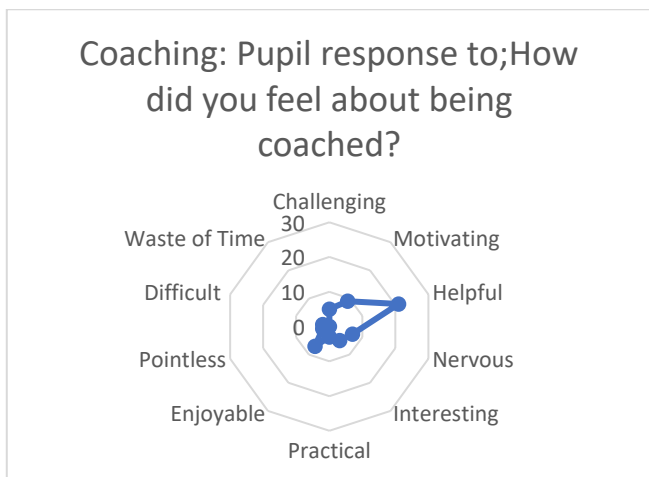
The below radar shows most clients found the intervention improved their positivity, their schoolwork and their self-regulation.



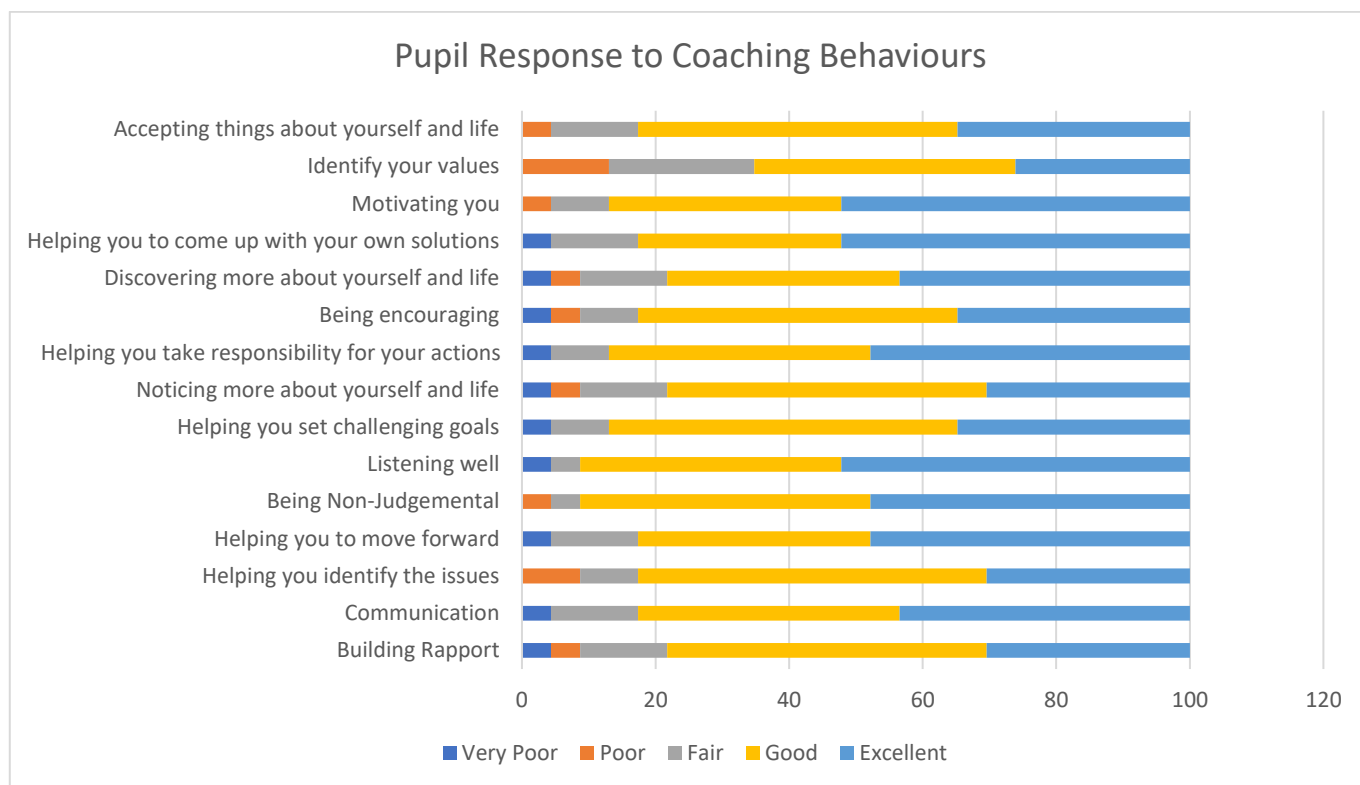
Additional qualitative data collected showed that the young people coached found that their coach helped a lot in making those changes particularly in self-confidence and raised their self-awareness.



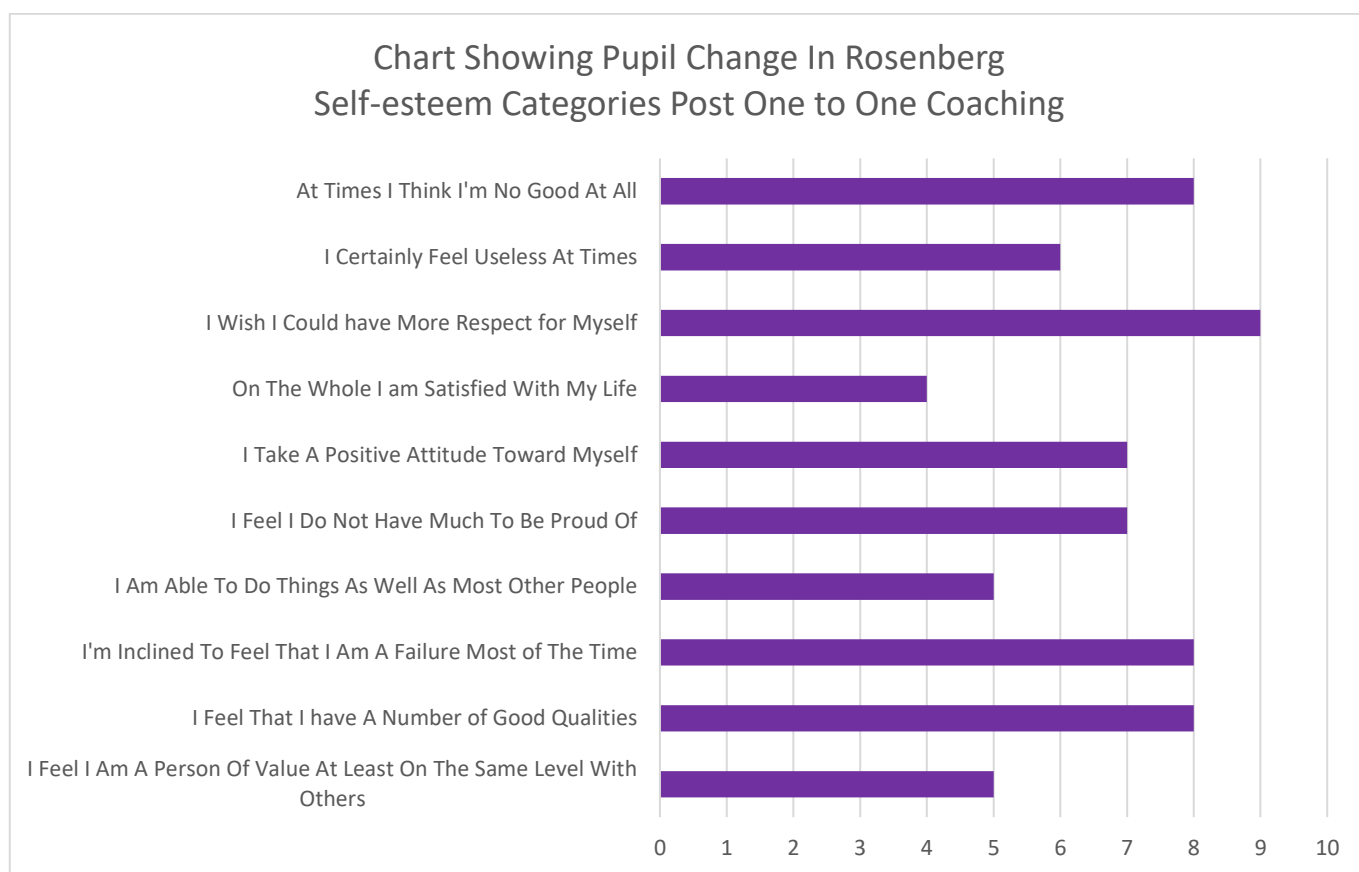
This surface radar and bar chart below suggests that the coaching relationship was helpful and most beneficiaries found it good to excellent.



We also measured coaching behaviours, and the behaviours that are rated highly by the beneficiaries (meaning that these were the behaviours they found most useful) were that the coaches listened well, helped them find their own solutions, were encouraging, non-judgemental, focused on forward motion and helped the beneficiary take responsibility for their own actions.



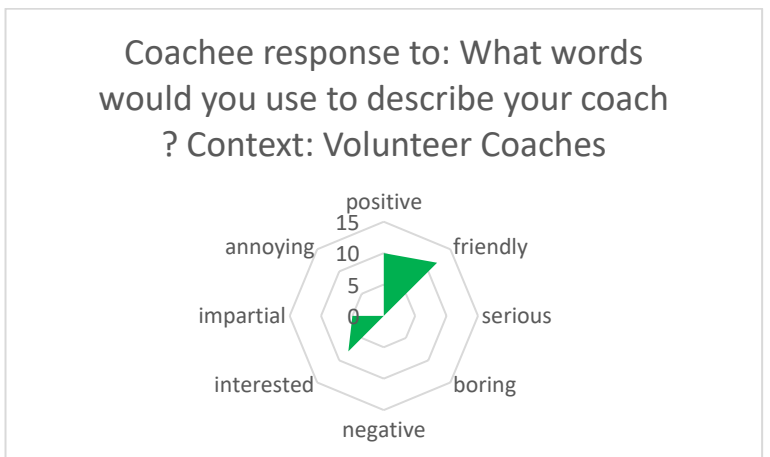
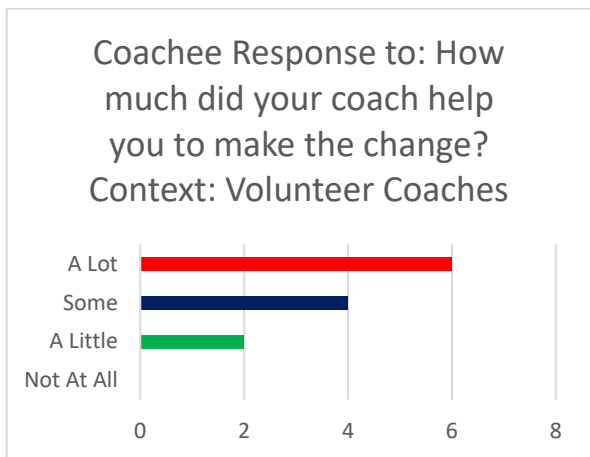
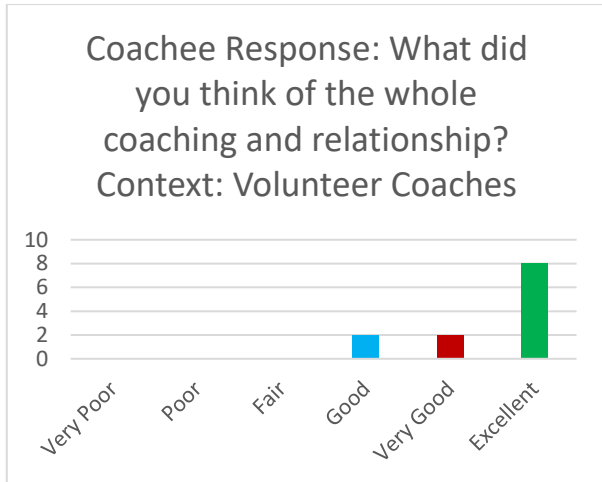
The project also measured self-esteem data using the Rosenberg Self-Esteem Scale. Most reported an increase having more respect for themselves, and better approaches to self and their thinking. Of those that Elevate were able to collect data from, 80% reported an increase in their self-esteem.



### C) Near Peer Coaching

The Near Peer Coaching project works to build the capacity of schools to provide wellbeing coaching for young people who are identified as having mild to moderate wellbeing needs. The project works to train older pupils who apply through their school systems to become Near Peer Coaches. The project was initially piloted as result of ideas coming out of the schools, from staff and our beneficiaries in the Can-Do project. Young people fed-back that pupils in schools feel more comfortable talking to their peers and would value a listening peer, who was skilled in supporting them. The pilot proved successful, and the Near Peer Coaching project was awarded funding by TNL Community Fund to grow into the Cardiff and Vale areas. The ultimate aim for the charity is to put a Near Peer Coach in every secondary school in Wales. When consulting schools in Cardiff and the Vale, they were interested in having the project in their schools as soon as possible. This resulted in Elevate working to get training of Near Peer Coaches in to meet the demand of schools that were consulted. We started Near Peer Coaching work in September 2019, and continued it until March 2020. Our Near Peer Coaching data was held back from the previous trustees annual report, and is included in this years report. From Sept 2019 to Jan 2021 we trained 138 near peer coaches across secondary schools in the Vale, Cardiff and one on the border of the Vale of Glamorgan in Rhondda-Cynon Taff and 18 university near peer coaches, but could not fulfil the full voluntary activity due to COVID-19 restrictions.

The bar charts and radar present what coaches thought of their volunteer university near peer coaches. The beneficiaries found their volunteer coaches to be excellent, helpful and helped them change a lot.



Near Peer university coaches were asked about their experience, and reported back positively about their voluntary activity. They were well supported and resourced.

**UNIVERSITY VOLUNTEERS COACHED 48 YOUNG PEOPLE FROM 4 DIFFERENT SCHOOLS. DUE TO COVID-19 THE EXIT DATA FOR ALL COACHEES COULD NOT BE GATHERED SO FULL IMPACT COULD NOT BE REPORTED ON IN THIS ANNUAL REPORT.**

**D) FINAL COMMENTS**

This report covers activity with beneficiaries from April 2020 to March 2021 in its report. The charity has already received enquiries from schools about its Near Peer Coaching programmes ‘post’ COVID-19. Covid-19 has resulted in not being able to fully report on the full impact of the charities work.

## SECTION 5

### FUTURE PLANS

The charity will continue to deliver its current grant funded activities.

The trustees champion the further development of the Near Peer Coaching programme and continue to believe this will enable the charity to widen its reach cost effectively. The Near Peer programme works to train in-school coaches in core coaching skills and builds capacity for the schools to provide wellbeing intervention, these older pupils are then matched with younger people that the school identifies as in need of support. The Near Peer Project was awarded funding and started Jan 2020, but has been affected by COVID-19 due to indefinite school closures. The charity has secured WCVA resilience funding to develop its near peer programme professionally and expand it to create a 'social enterprise' model of income.

The charity is looking at sources of income through coach training, it has been accredited for its training programme by the Association of Coaching, and is also a recognised delivery partner for Adult Learning Wales. The aim of accreditation is to monetise the charities offerings and create a more self-sustainable model. This may result in forming a trading company.

The charity continues to be engaged in research collaborating with the University of South Wales. The charity continues to be involved with the Special Group in Coaching Psychology, an interest group in the British Psychological Society, and the international Coaching in Education group, made up of representatives of various universities.

### **FINANCIAL REVIEW & RESERVES POLICY** **Financial Year from April 2020 – March 2021**

In the year ended 31 March 2021, due to the ongoing global pandemic the charity activities were limited as described in the above report. This meant the charity's staff were furloughed and £46,733 of furlough monies were received. The National Lottery fund received an additional £97,516 and a new part grant, part loan of £29,141 was received from the WCVA.

For a full operational year, the annual costs (all restricted) of £71,154 (2020: £72,955) gave a year-end restricted fund of £107,677 (2020: £5,441).

Although the grants have provided restricted working capital, the charity's year-end reserves (unallocated, unrestricted funds) of £97 are obviously inadequate to fund working capital for future work-streams. The charity's aim is, through a combination of fundraising and primary-purpose trading, to build up reserves of at least £5,000 to provide general working capital.

This trustees' annual report was approved by the trustees on 10 December 2021 and signed on their behalf by:



Lyndon Watkins, Chair

## **INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF ELEVATE**

I report on the accounts of Elevate (the charity) for the year ended 31 March 2021, which are set out on the last page.

### **Responsibilities and basis of report**

As the trustees of the charity, 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 charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the Directions applicable to receipts and payments accounts 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 in connection with the examination giving me cause to believe that in any material respect:

- Accounting records were not kept in respect of the charity as required by section 130 of the Act.
- The accounts do not accord with those records.

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



Helen Williams FCA

Derwen Accountancy Limited  
28a Cowbridge Road  
Pontyclun  
CF72 9EE

10 December 2021

**Elevate Receipts and Payments 2020/21**

	Unrestricted	Restricted	Total for Year	
	Funds	Funds	2020/21	2019/20
Receipts	£	£	£	£
National Lottery Community Fund	-	97,516	97,516	24,957
WCVA Grant	-	21,856	21,856	-
Other income	-	46,733	46,733	6
Bank interest	8	-	8	24
	<u>8</u>	<u>166,105</u>	<u>166,113</u>	<u>24,987</u>
<b>Asset and investment sales</b>				
Loans received from WCVA	-	7,285	7,285	-
	<u>-</u>	<u>7,285</u>	<u>7,285</u>	<u>-</u>
Total receipts	<u>8</u>	<u>173,390</u>	<u>173,398</u>	<u>24,987</u>
<b>Payments</b>				
Staff	-	61,236	61,236	63,919
Service delivery	-	3,251	3,251	2,626
Promotion/Marketing & Advertising	-	1,697	1,697	176
Administration	-	4,970	4,970	6,234
	<u>-</u>	<u>71,154</u>	<u>71,154</u>	<u>72,955</u>
Total payments	<u>-</u>	<u>71,154</u>	<u>71,154</u>	<u>72,955</u>
Net of receipts/(payments)	8	102,236	102,244	(47,968)
Cash funds last year end	89	5,441	5,530	53,498
<b>Cash funds this year end</b>	<u><b>97</b></u>	<u><b>107,677</b></u>	<u><b>107,774</b></u>	<u><b>5,530</b></u>
<b><u>Statement of Assets and Liabilities as at 31 March 2020</u></b>				
<b>Cash Funds</b>				
Bank accounts	97	107,677	107,774	5,530
Cash float	-	-	-	-
<b>Total cash funds</b>	<u><b>97</b></u>	<u><b>107,677</b></u>	<u><b>107,774</b></u>	<u><b>5,530</b></u>
<b>Assets retained for Charity's own use (at cost)</b>				
Laptops/printer	2,391	-	2,391	2,391
Other equipment	472	-	472	472
Furniture	279	-	279	279
<b>Total own use assets</b>	<u><b>3,142</b></u>	<u><b>-</b></u>	<u><b>3,142</b></u>	<u><b>3,142</b></u>
<b>Liabilities</b>				
Independent examination creditor	-	845	845	845
WCVA Loan	-	7,285	7,285	-
Other creditors	-	-	-	414
<b>Total liabilities</b>	<u><b>-</b></u>	<u><b>8,130</b></u>	<u><b>8,130</b></u>	<u><b>1,259</b></u>

The trustees confirm, in accordance with the Charitable Incorporated Organisations (General) Regulations 2012, that at year end the CIO did not have any outstanding guarantees to third parties nor any debts secured on assets of the CIO.

Approved by the trustees on 10 December 2021 and signed on their behalf by:



Lyndon Watkins, Chair

