

elevate

Raising Skills, Lifting Aspirations, Improving Community

TRUSTEES ANNUAL REPORT & FINANCIAL STATEMENTS

YE 31 MARCH 2021

Chairman Summary

Resilience - /rɪˈzɪliəns/
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.

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. 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

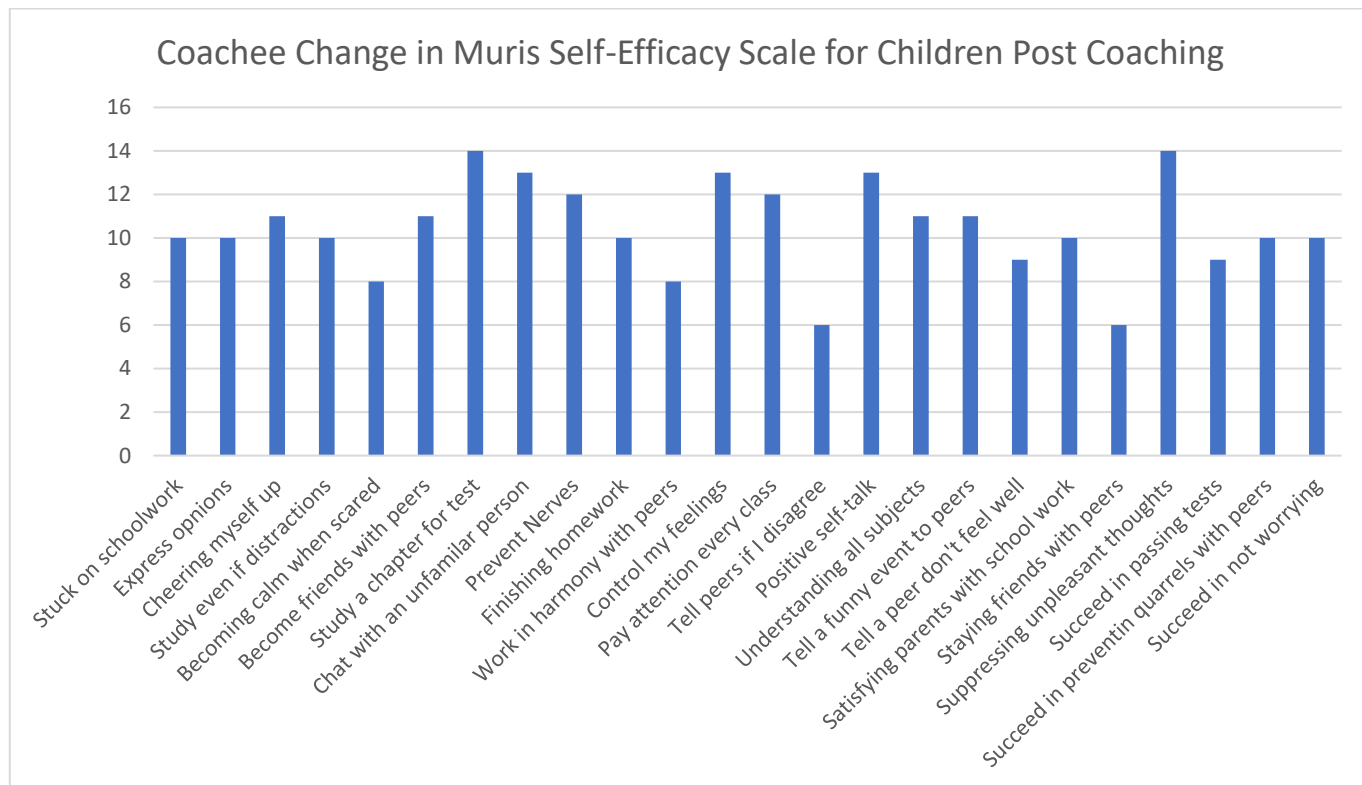
Elevate continued to offer its one-to-one coaching service, as due to social bubbling it's near peer coaching programme was affected. We were not able to utilise volunteers due to COVID-19 restrictions in schools.

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.

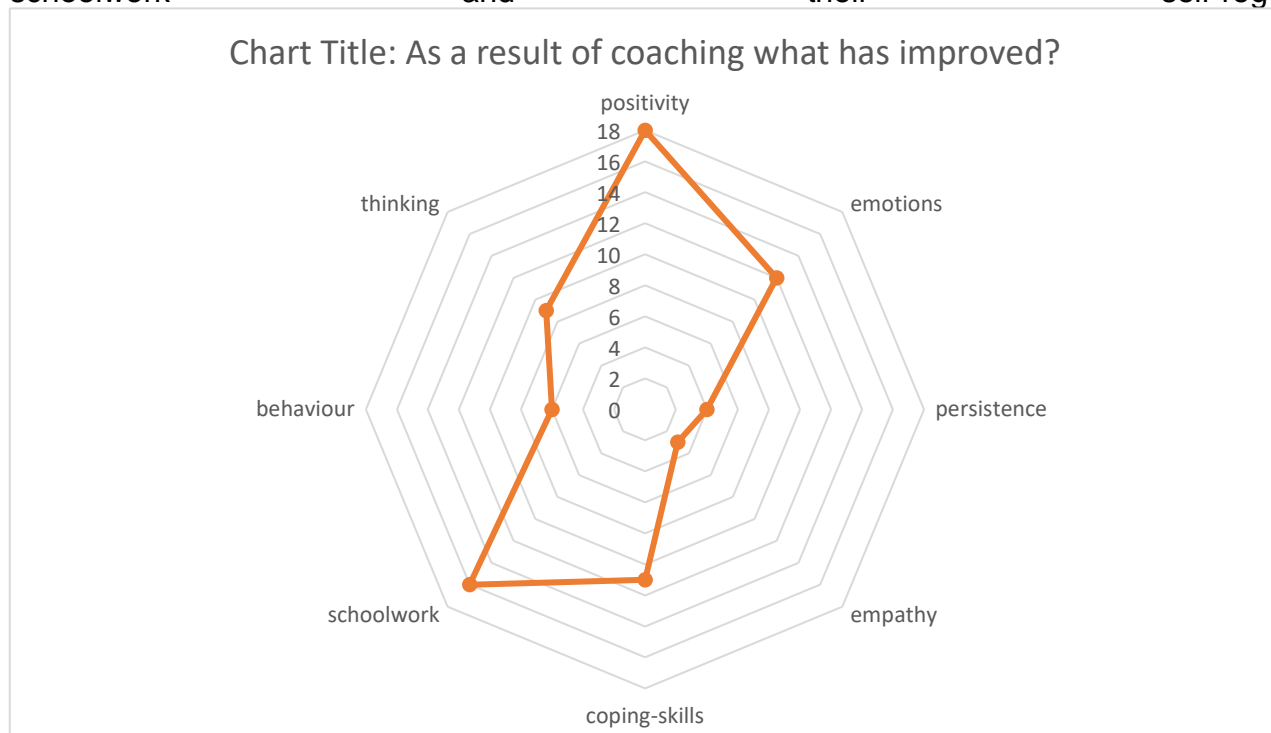
In the three terms the coaching service served 39 young people referred, of these 11 had Skype sessions. Staff operated on a flexible furlough basis. It was difficult to collect data from the Skype

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

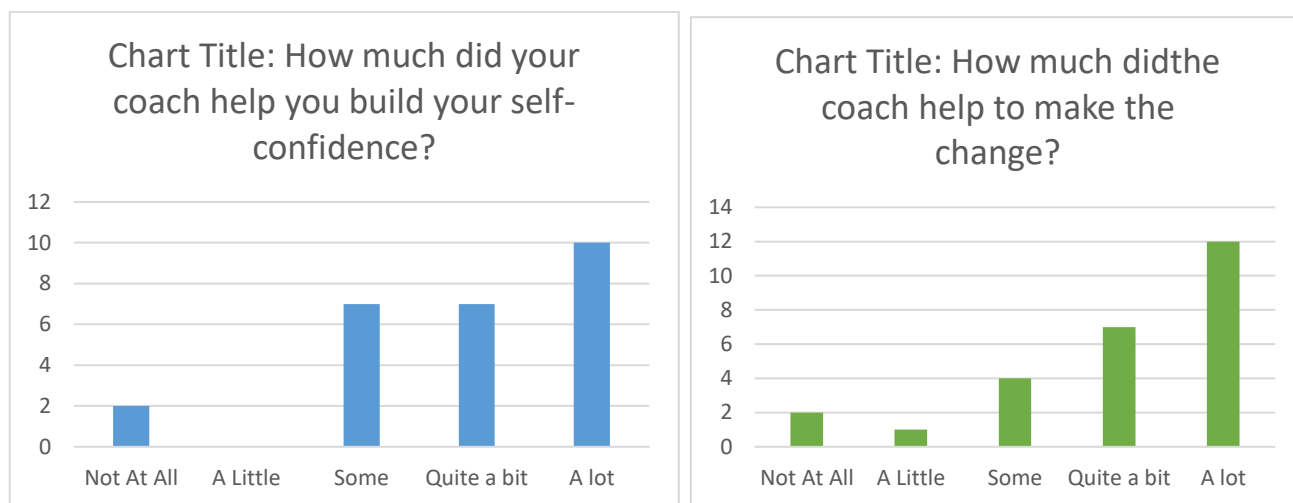
We used the Muris Self-Efficacy scale for young people to measure post-coaching impact. The bar chart below represents changes in self-efficacy per category. Changes reported showed improvements in thinking, self-regulation and academic approaches.



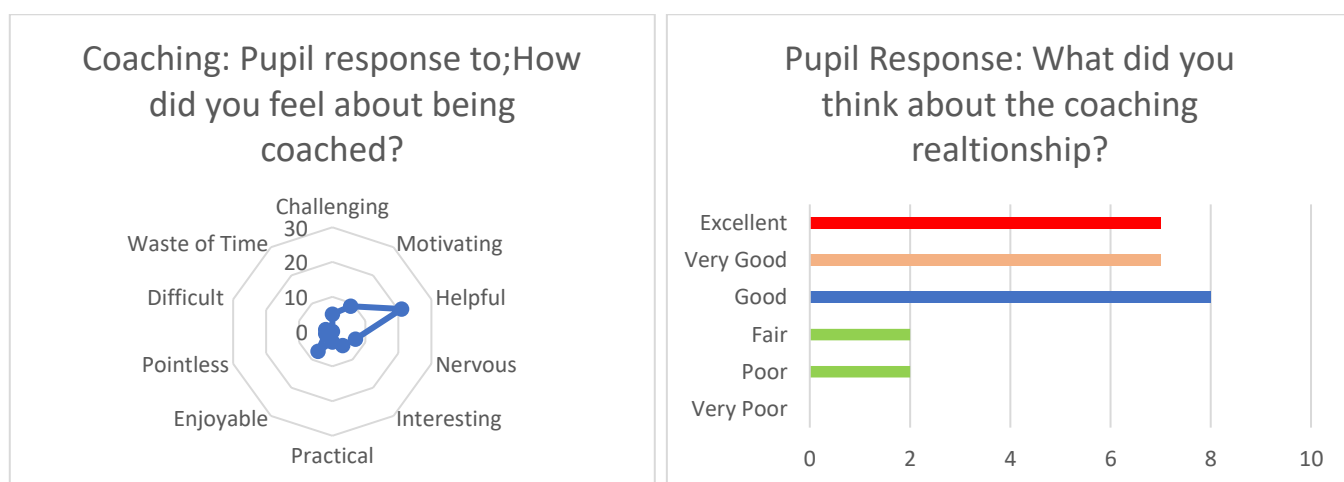
The below radar shows most clients found the intervention improved their positivity, their schoolwork and their self-regulation.



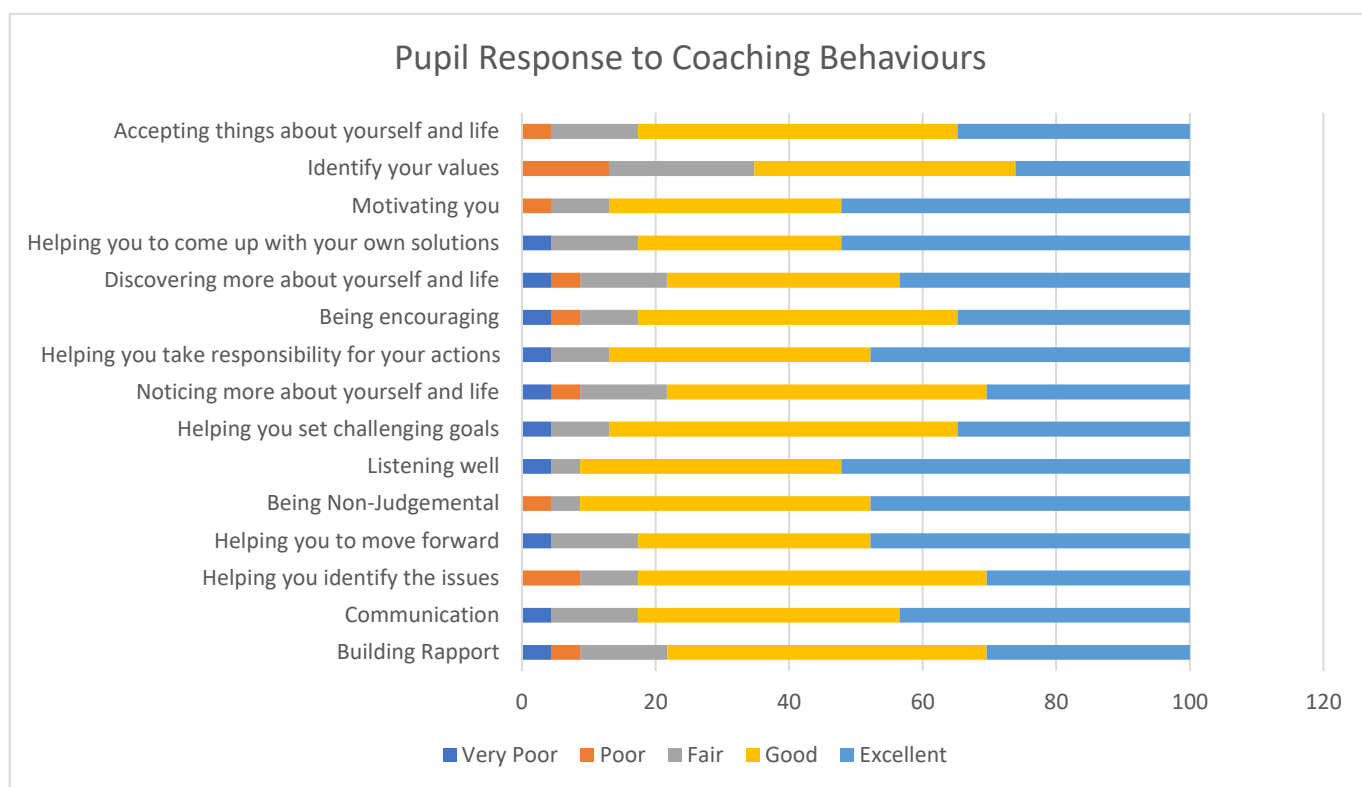
Additional qualitative data collected showed that the young people coached found that their coach helped a lot in making those changes particularly in self-confidence and raised their self-awareness.



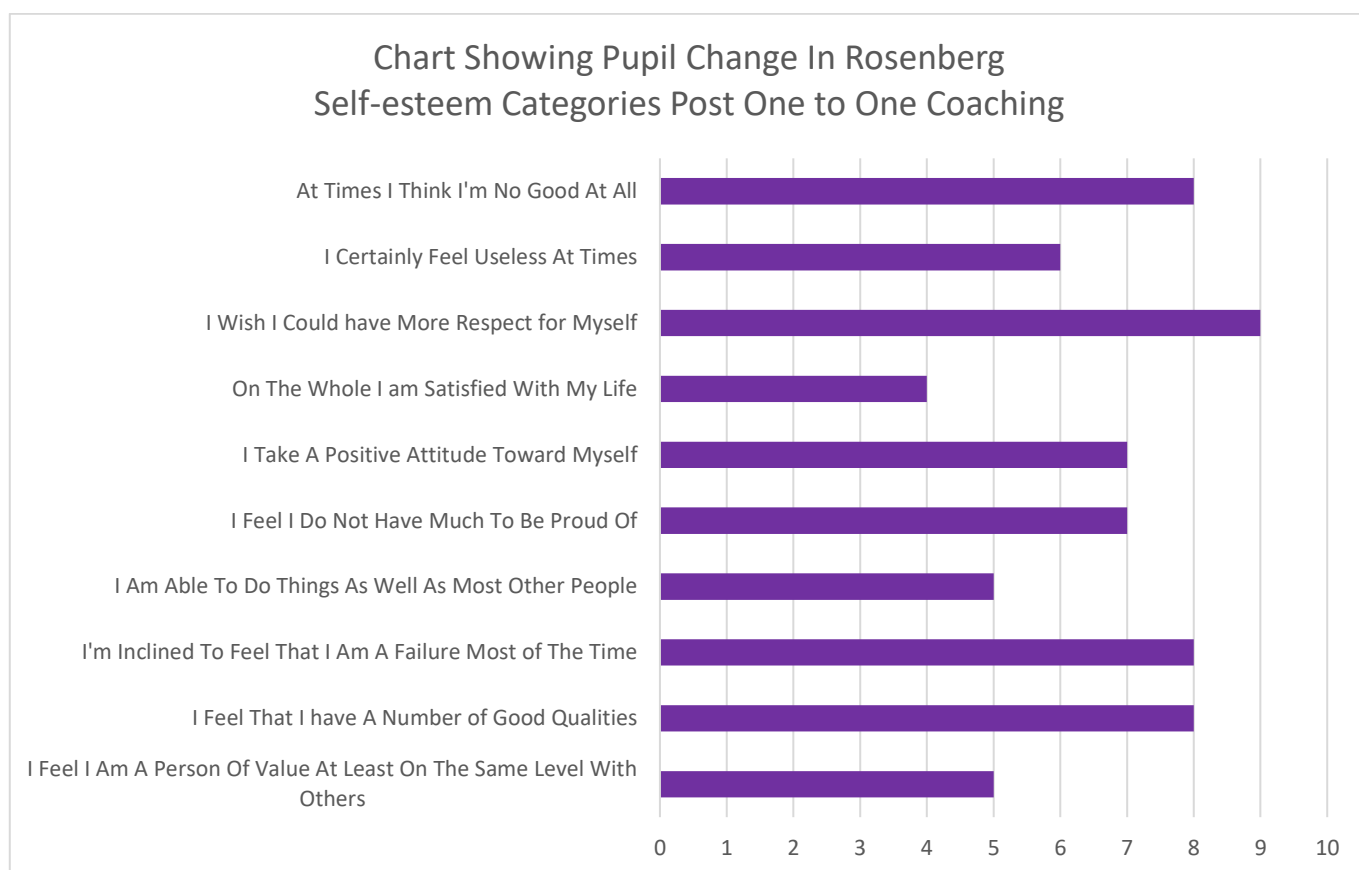
This surface radar and bar chart below suggests that the coaching relationship was helpful and most beneficiaries found it good to excellent.



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.



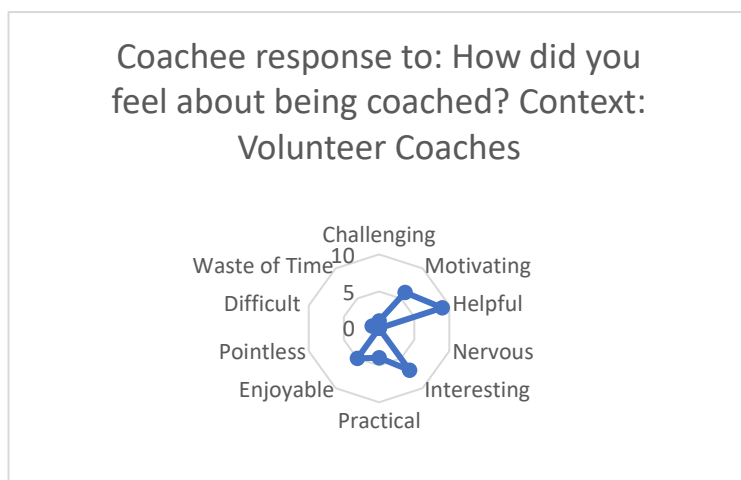
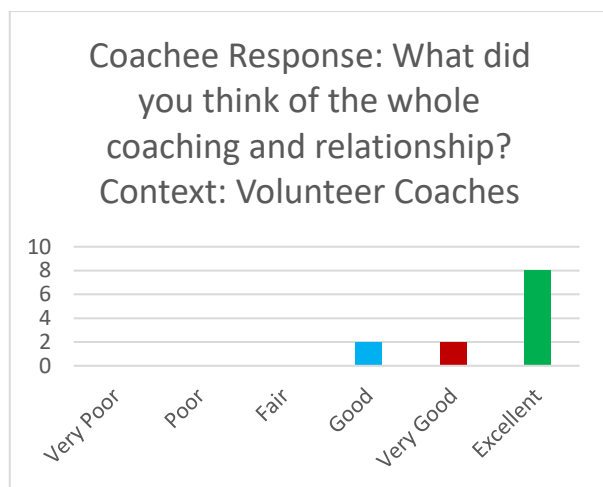
The project also measured self-esteem data using the Rosenberg Self-Esteem Scale. Most reported an increase having more respect for themselves, and better approaches to self and their thinking. Of those that Elevate were able to collect data from, 80% reported an increase in their self-esteem.



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').

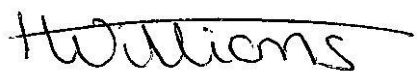
I report in respect of my examination of the charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the Directions applicable to receipts and payments accounts given by the Charity Commission under section 145(5)(b) of the Act.

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.

A handwritten signature in black ink, appearing to read 'H Williams', with a horizontal line drawn through the middle of the letters.

Helen Williams FCA

Derwen Accountancy Limited
28a Cowbridge Road
Pontyclun
CF72 9EE

10 December 2021

Elevate Receipts and Payments 2020/21

	Unrestricted Funds	Restricted Funds	Total for Year	
	£	£	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>
Asset and investment sales				
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>
Payments				
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
Cash funds this year end	<u><u>97</u></u>	<u><u>107,677</u></u>	<u><u>107,774</u></u>	<u><u>5,530</u></u>
<u>Statement of Assets and Liabilities as at 31 March 2020</u>				
Cash Funds				
Bank accounts	97	107,677	107,774	5,530
Cash float	-	-	-	-
Total cash funds	<u><u>97</u></u>	<u><u>107,677</u></u>	<u><u>107,774</u></u>	<u><u>5,530</u></u>
Assets retained for Charity's own use (at cost)				
Laptops/printer	2,391	-	2,391	2,391
Other equipment	472	-	472	472
Furniture	279	-	279	279
Total own use assets	<u><u>3,142</u></u>	<u><u>-</u></u>	<u><u>3,142</u></u>	<u><u>3,142</u></u>
Liabilities				
Independent examination creditor	-	845	845	845
WCVA Loan	-	7,285	7,285	-
Other creditors	-	-	-	414
Total liabilities	<u><u>-</u></u>	<u><u>8,130</u></u>	<u><u>8,130</u></u>	<u><u>1,259</u></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

