

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
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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 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

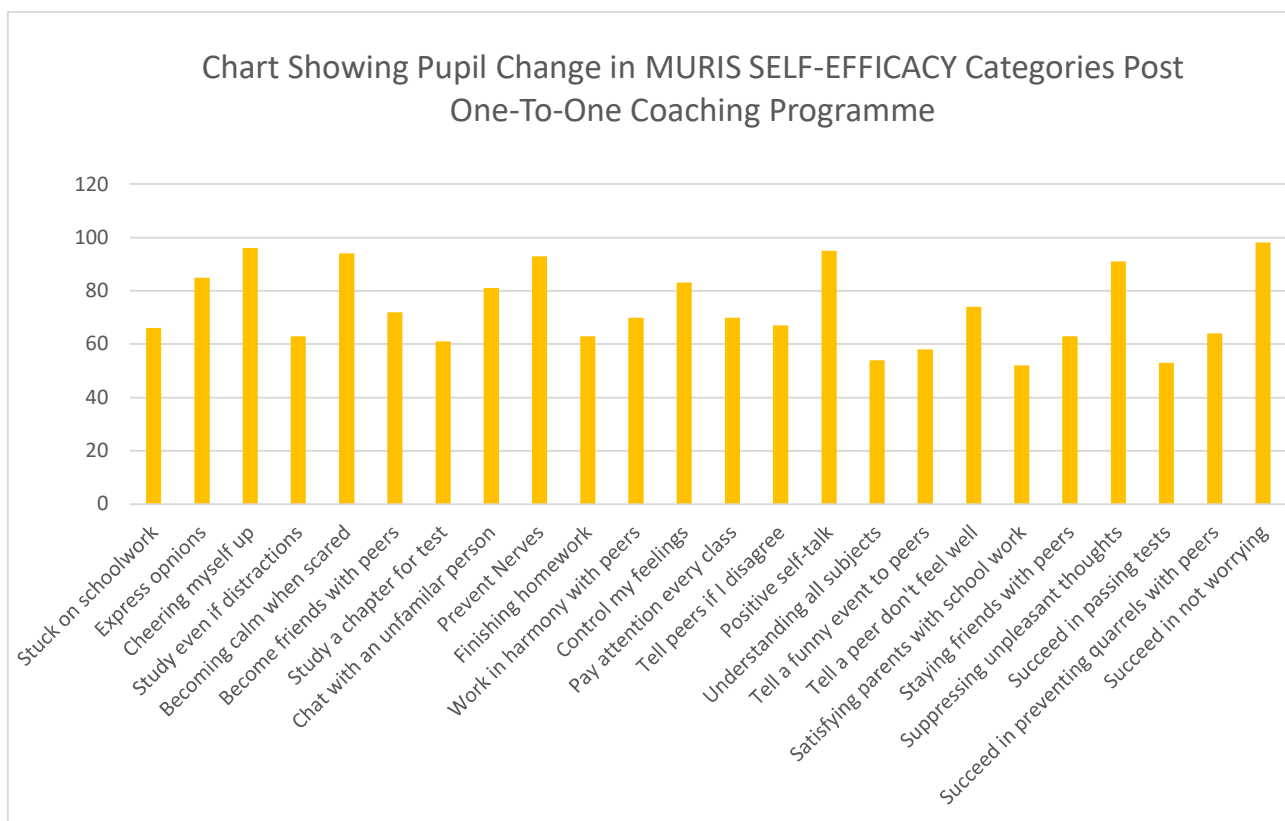
B) One to One Coaching

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.

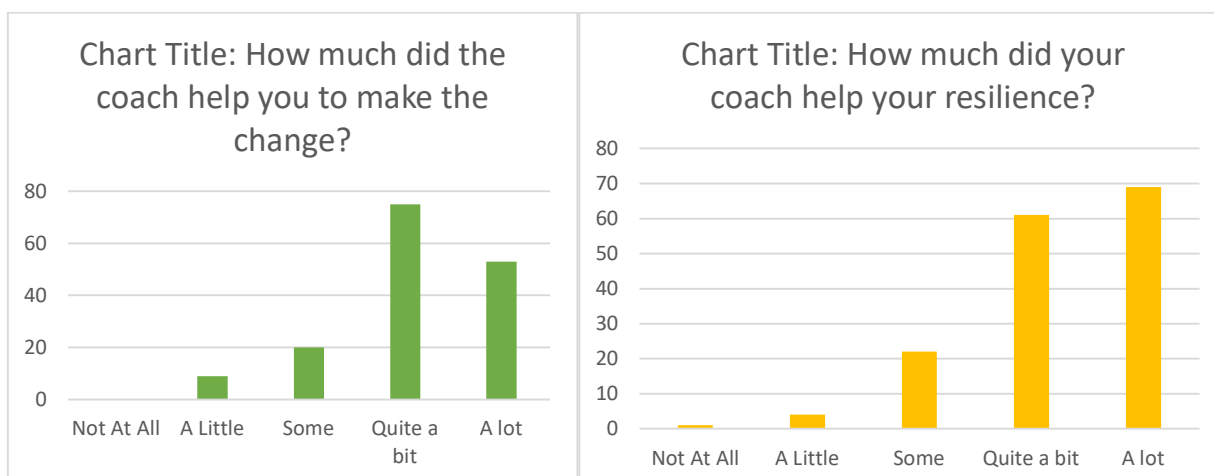
In the three terms the coaching service served 161 young people referred, of these 37% were male, 63% female. We have seen an increase in female clients in the Covid-19 period.

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.

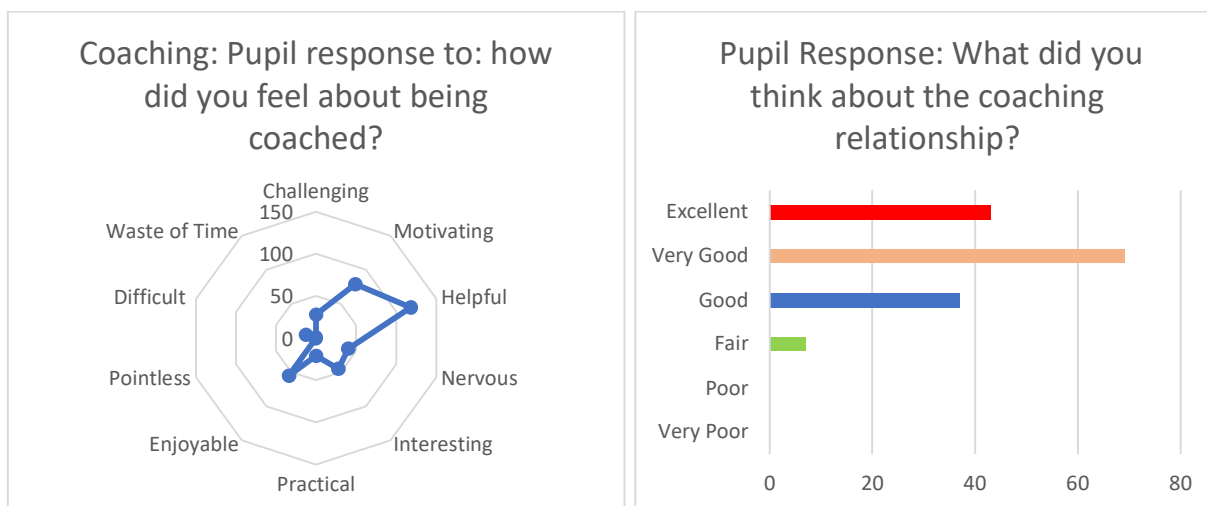


Qualitative data showed most clients found the intervention improved their positivity, their thinking, and their emotions.

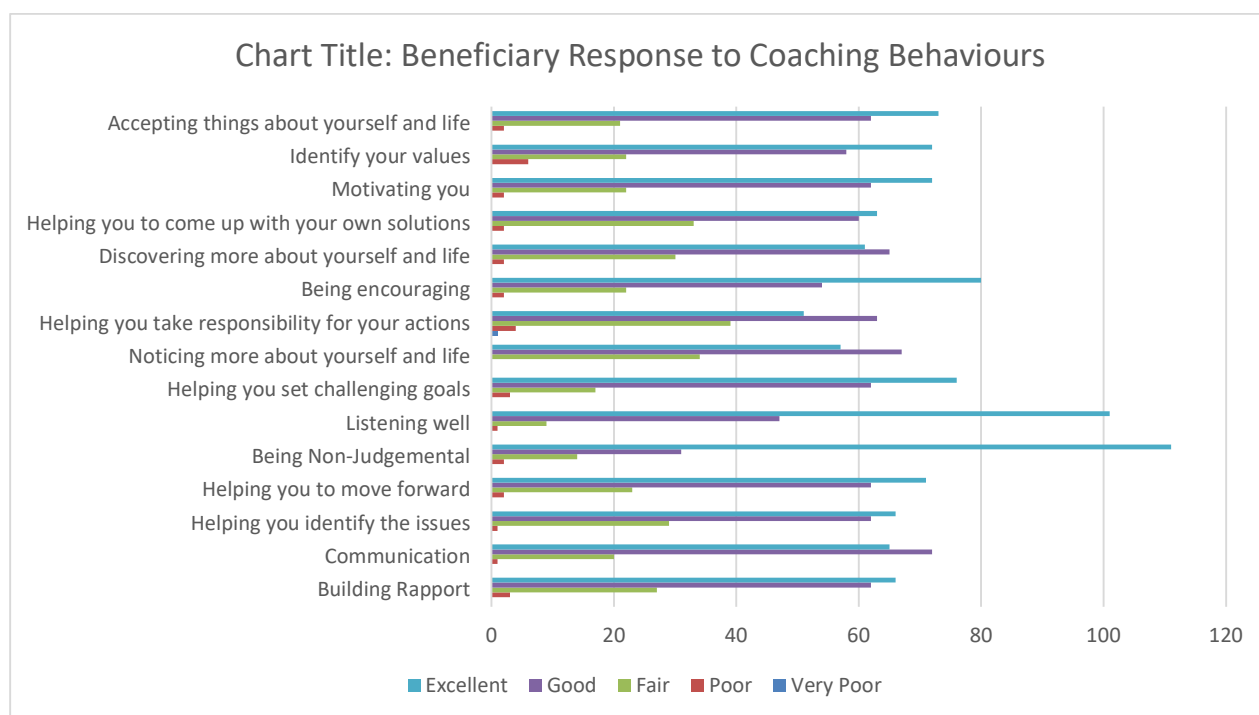
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient.



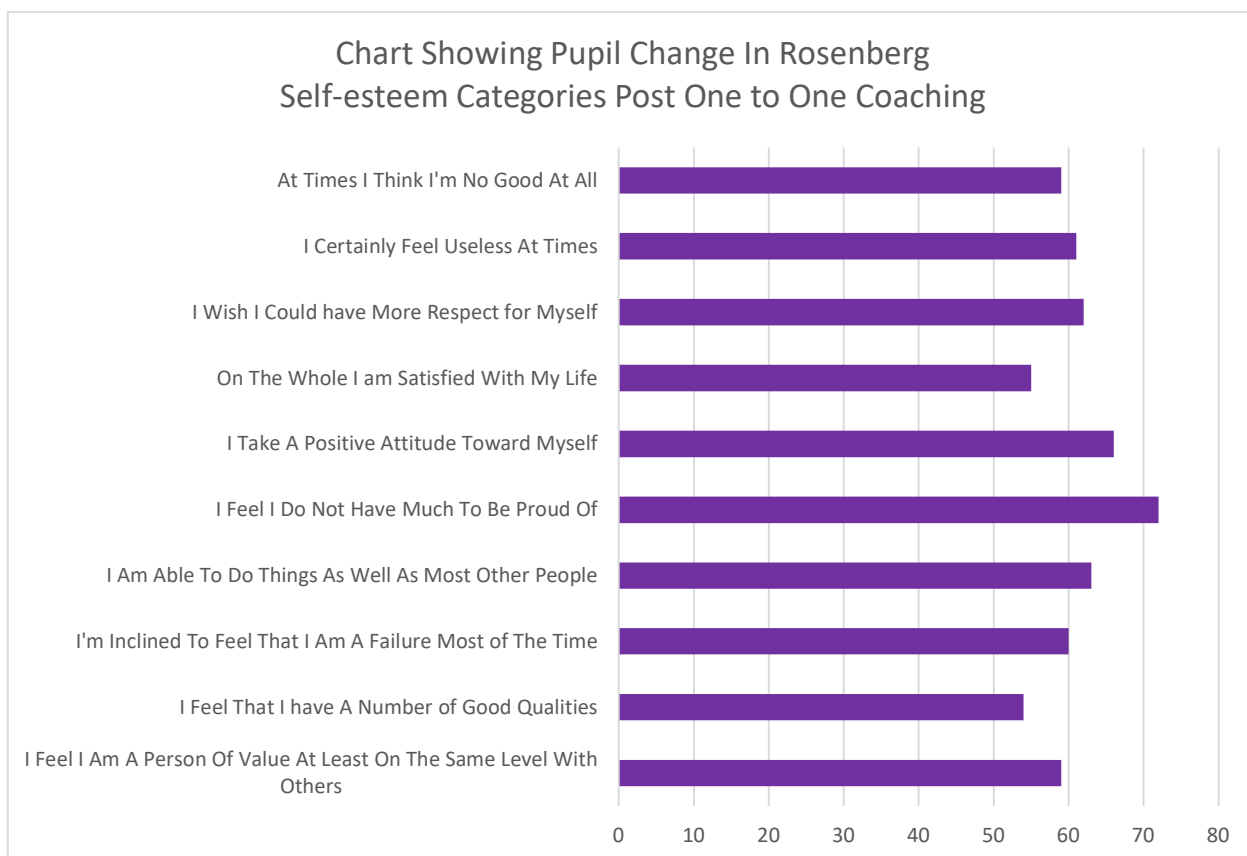
This surface radar and bar chart below suggests that the coaching relationship was helpful, motivating and most beneficiaries found it good to excellent.



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', with a stylized flourish at the end.

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 £
Receipts				
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>
Asset and investment sales				
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>
Payments				
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
Cash funds this year end	<u><u>110</u></u>	<u><u>98,192</u></u>	<u><u>98,301</u></u>	<u><u>107,774</u></u>
<u>Statement of Assets and Liabilities as at 31 March 2022</u>				
Cash Funds				
Bank accounts	110	98,192	98,301	107,774
Total cash funds	<u><u>110</u></u>	<u><u>98,192</u></u>	<u><u>98,301</u></u>	<u><u>107,774</u></u>
Assets retained for Charity's own use (at cost)				
Laptops/printer	7,512	-	7,512	2,391
Other equipment	472	-	472	472
Furniture	458	-	458	279
Total own use assets	<u><u>8,442</u></u>	<u><u>-</u></u>	<u><u>8,442</u></u>	<u><u>3,142</u></u>
Liabilities				
Independent examination creditor	-	1,500	1,500	845
WCVA Loan	-	9,107	9,107	7,285
Other creditors	-	-	-	-
Total liabilities	<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 2008 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