

# 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**

<b>Charity Name:</b>	<b>ELEVATE</b>
<b>Charity Number:</b>	<b>1163004</b>
<b>Charity Address:</b>	<b>The Business Centre</b>
	<b>Cardiff House</b>
	<b>Cardiff Rd</b>
	<b>Barry</b>
	<b>CF63 2AW</b>

## **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  
STATUS  
TRUSTEE SELECTION

The charity is governed by constitution adopted in Aug 2015  
The Charity is a CIO  
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.

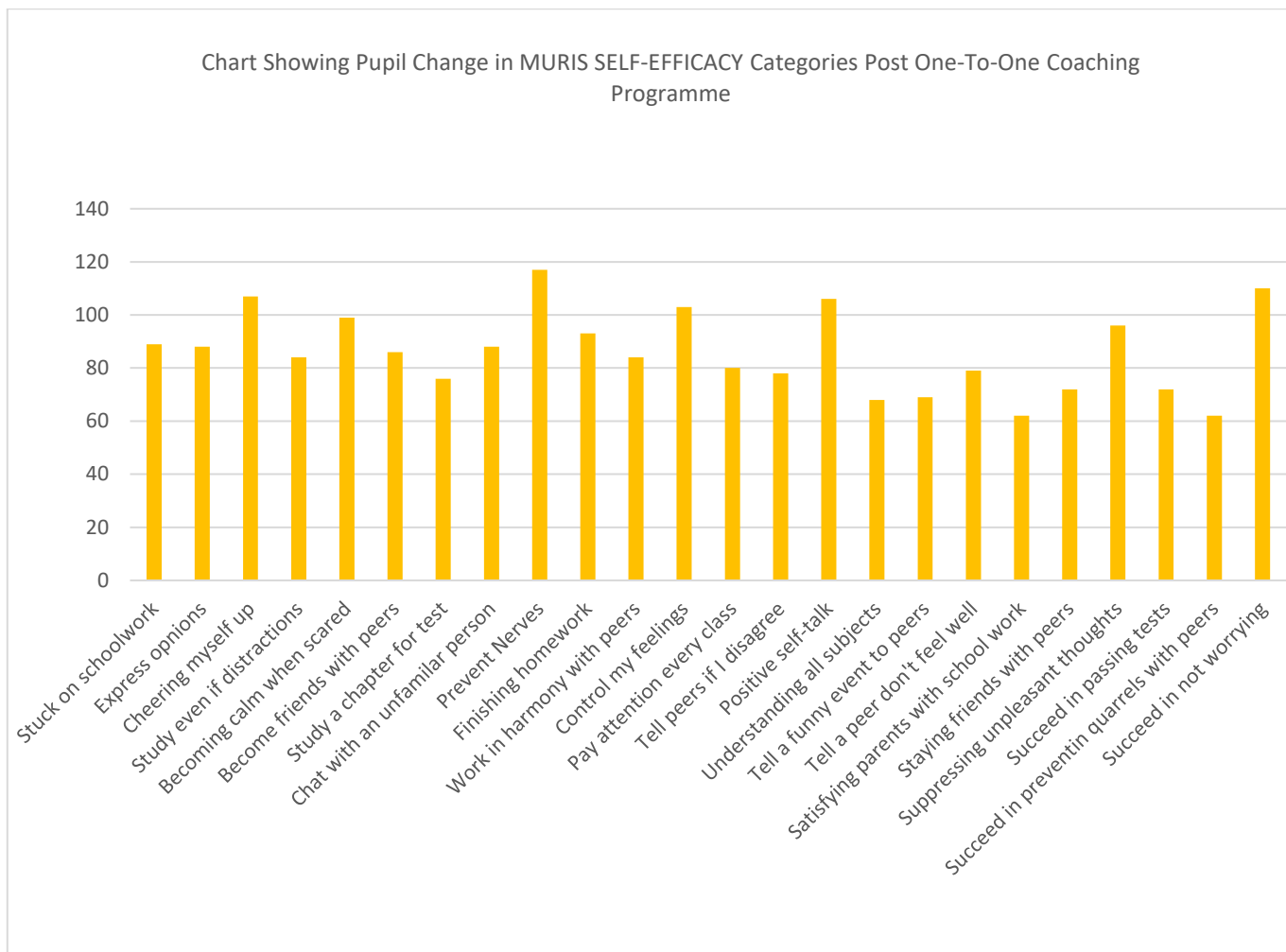
#### **B) One to One Coaching**

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.

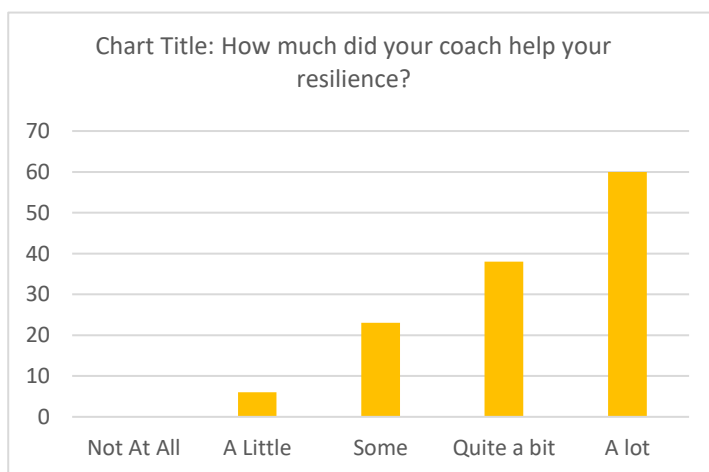
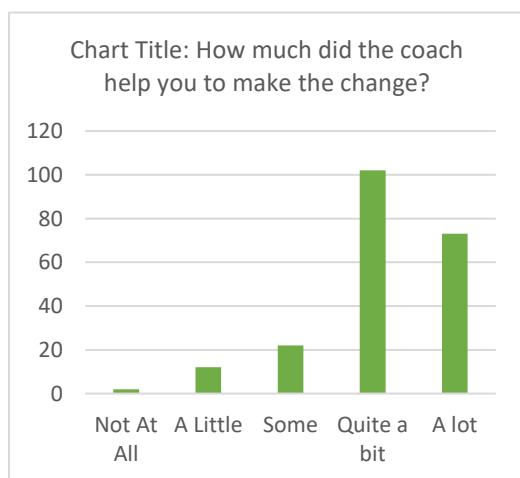
In the two terms the coaching service served 230 young people referred. Attendance of beneficiaries ranged from 89%-100% on our coaching programme. We received data from 171.

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.

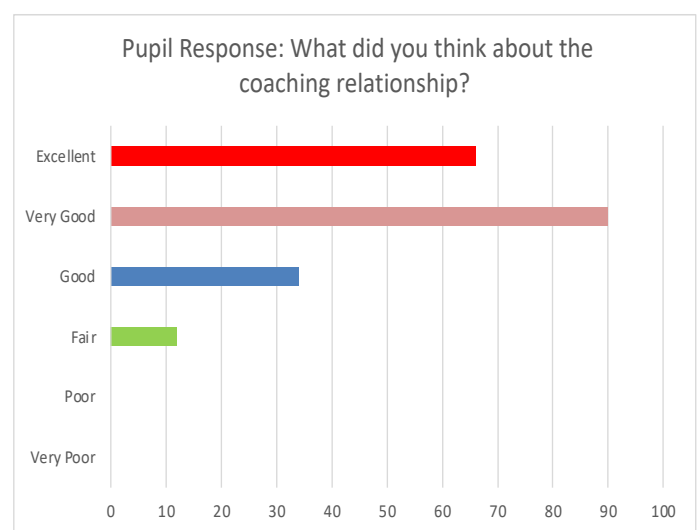
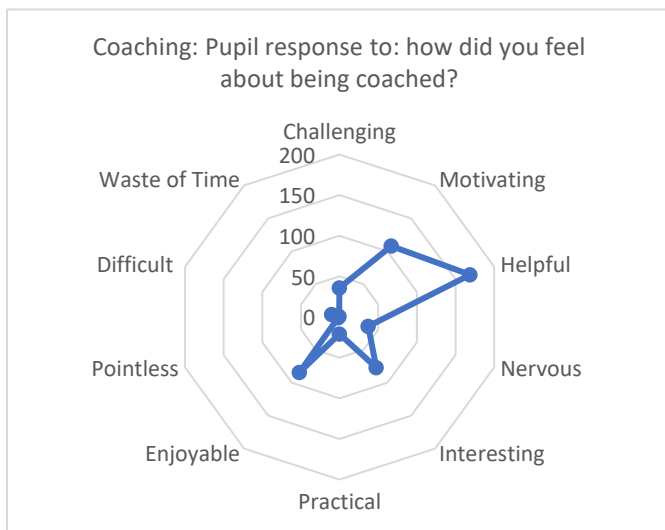


Qualitative data showed most clients found the intervention improved their positivity, their thinking, and their emotions.

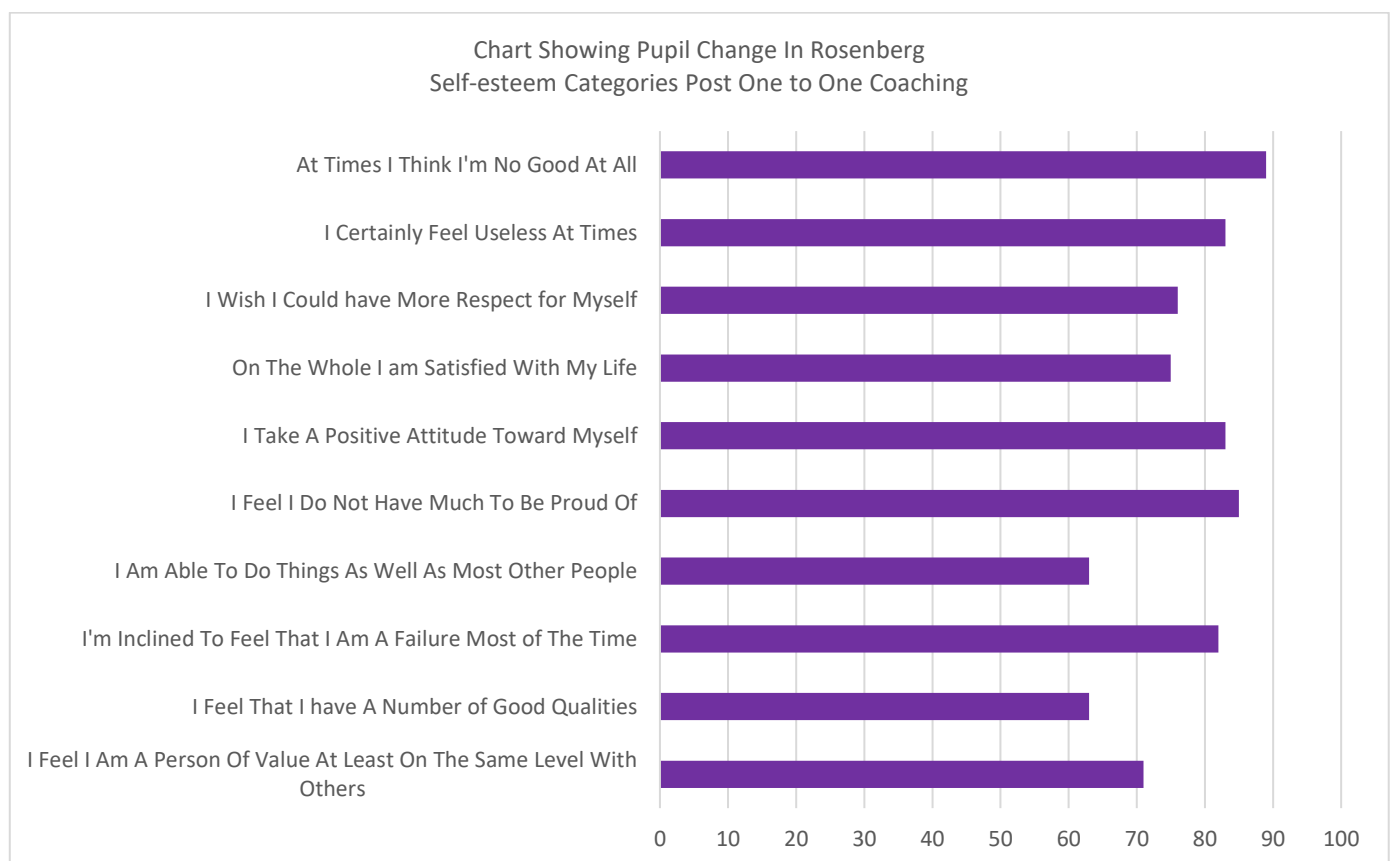
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient.



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