

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

Community Banking

Haines Watts Wales LLP.

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	Annually Reviewed
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 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 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

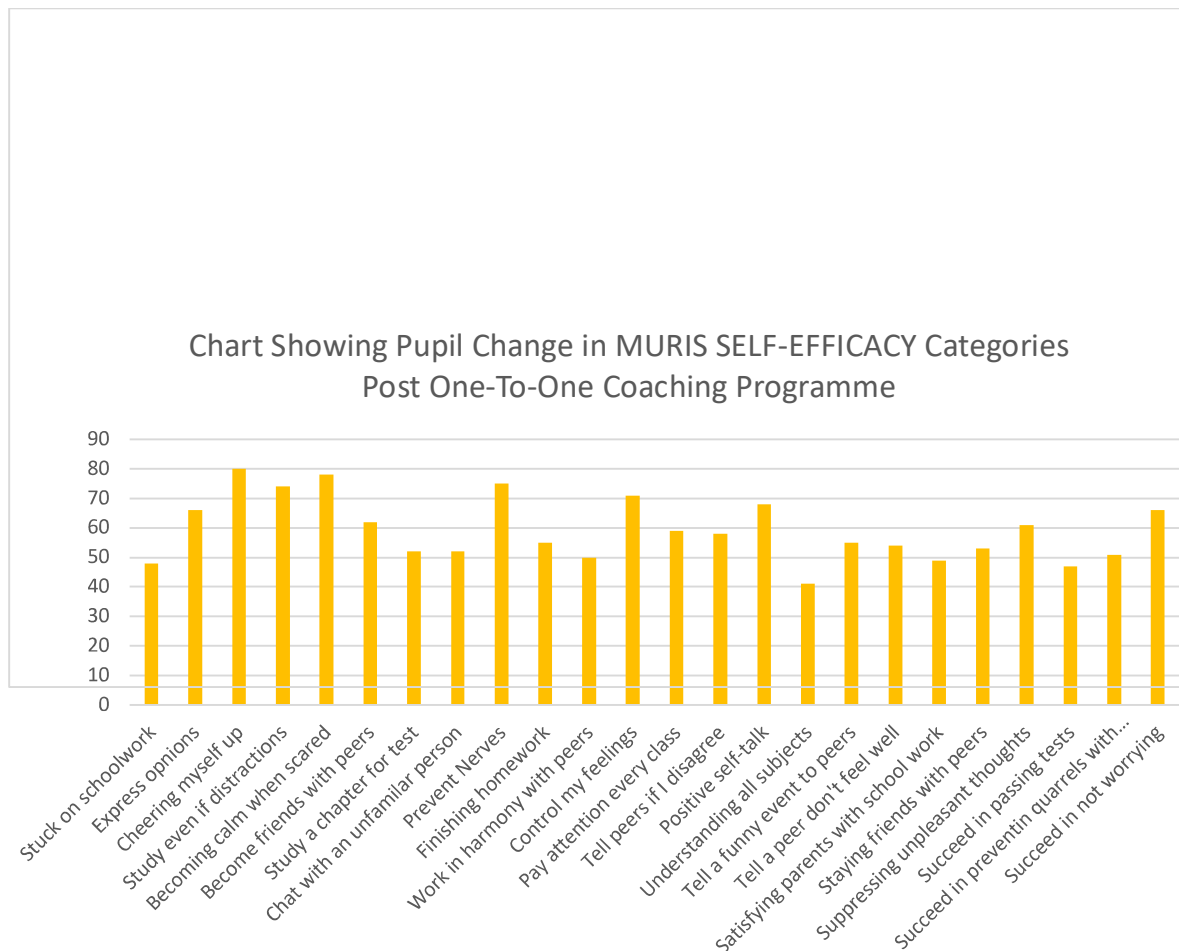
Elevate continued to offer its one-to-one coaching service.

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

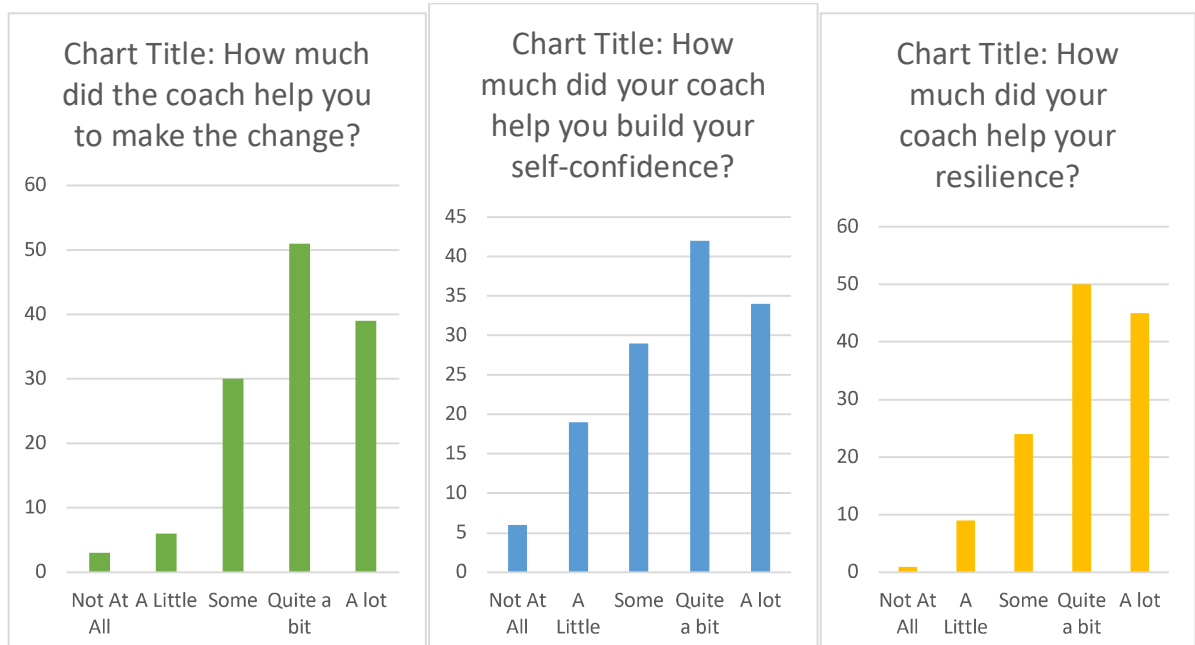
self-confidence and that the coach played a significant role in helping to bring about these changes. An assessment was carried out as to which coaching behaviours (behaviour of the coach) was most helpful. 94% found that the coach offering a non-judgemental space was useful. 90% responding that the 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.



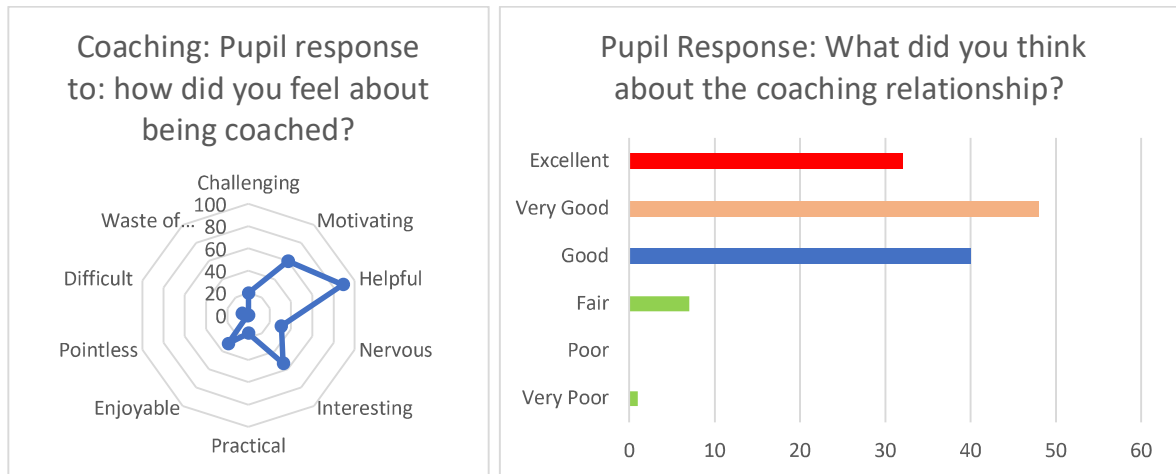
Muris data above suggests most beneficiaries improve in emotional self-efficacy.

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

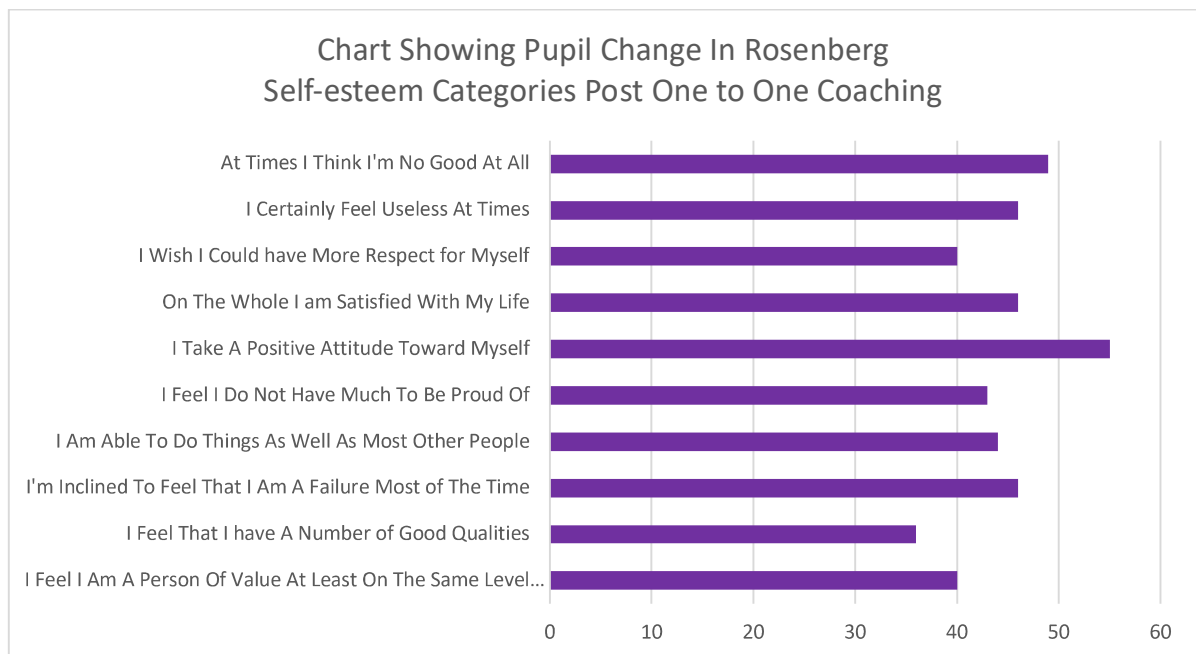
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient and self-confident.



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', 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 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 Funds	Restricted Funds	Total for Year	
	£	£	2023/24	2022/23
Receipts				
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>
Asset and investment sales				
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>
Payments				
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
Cash funds this year end	<u>31,440</u>	<u>77,155</u>	<u>108,595</u>	<u>90,007</u>

Statement of Assets and Liabilities as at 31 March 2024

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