

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.

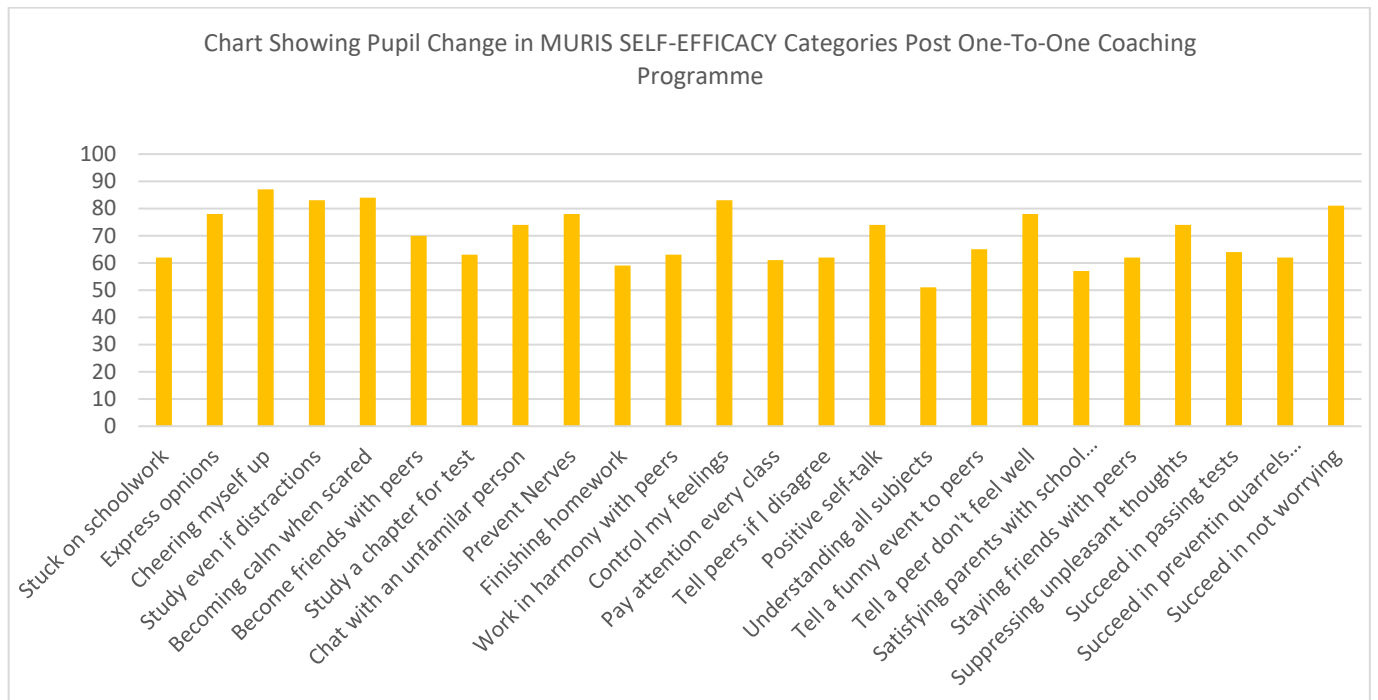
B) One to One Coaching

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.

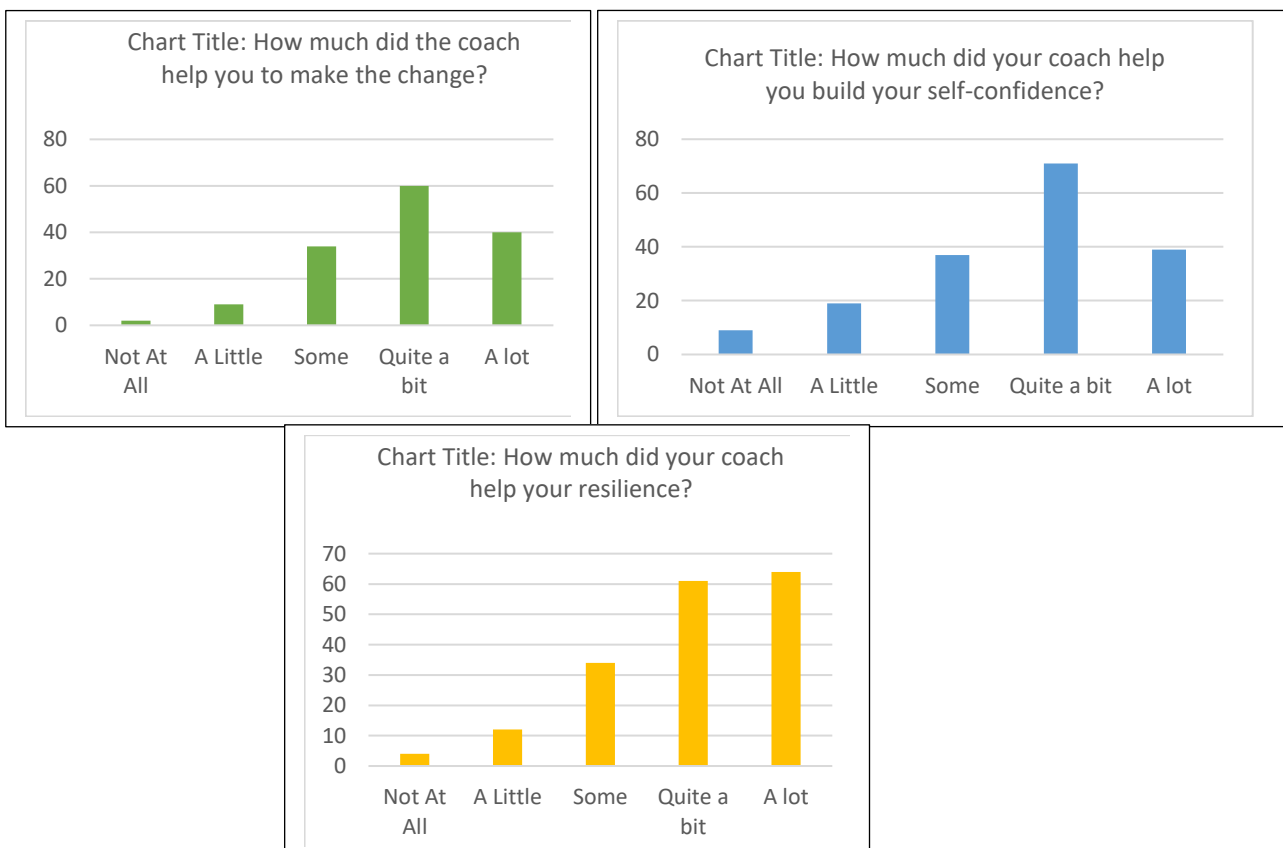
The coaching helped the clients to increase their sense of positivity, emotional self-regulation, thinking skills in managing their own mental health and associated behaviours. Clients stated that coaching helped them with their resilience, with the majority self-reporting increases in self-confidence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

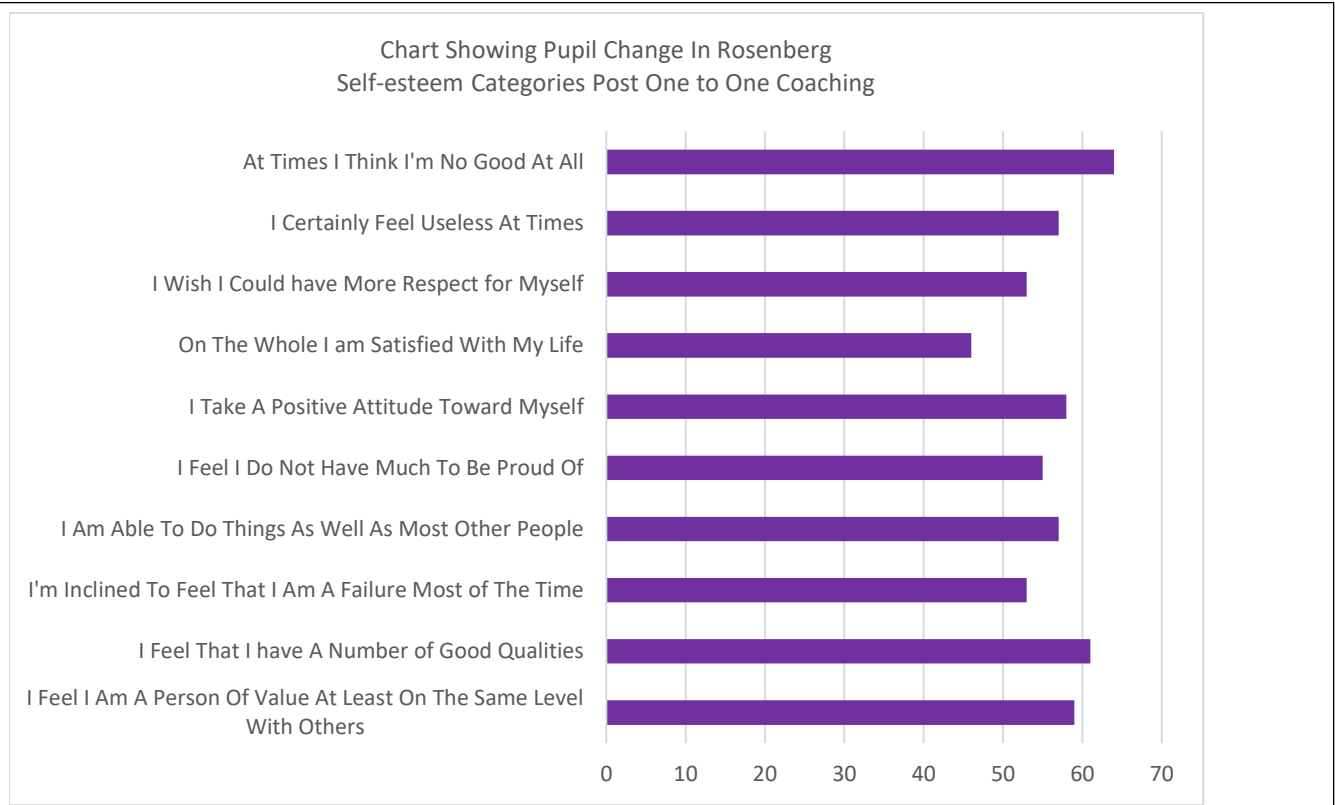
Additional qualitative data collected showed that the young people coached found that their coach helped a quite a bit to a lot in making those changes, particularly beneficiaries reported being more resilient and self-confident.



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', 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 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
5th 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
Receipts	£	£	£	£
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>
Asset and investment sales				
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>
	<u>28,958</u>	<u>79,105</u>	<u>108,064</u>	<u>118,756</u>
Total receipts				
	<u>28,958</u>	<u>79,105</u>	<u>108,064</u>	<u>118,756</u>
Payments				
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
	<u>-</u>	<u>100,301</u>	<u>100,301</u>	<u>100,168</u>
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
	<u>60,398</u>	<u>55,958</u>	<u>116,357</u>	<u>108,595</u>
Cash funds this year end				
	<u>60,398</u>	<u>55,958</u>	<u>116,357</u>	<u>108,595</u>

Statement of Assets and Liabilities as at 31 March 2025

Cash Funds

Bank accounts	60,398	55,958	116,357	108,595
Total cash funds	60,398	55,958	116,357	108,595

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	1,670	-	1,670	1,670
Total own use assets	10,708	-	10,708	12,063

Liabilities

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

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 25th of November 2025 and signed on their behalf by:



Lyndon Watkins, Chair