

Veterans in Sefton

Charity No. 1168128

Trustees' Report and Unaudited Accounts

31 March 2022

Veterans in Sefton
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Veterans in Sefton
Trustees Annual Report

The trustees present their report with the unaudited financial statements of the charity for the year ended 31 March 2022.

REFERENCE AND ADMINISTRATIVE DETAILS

Charity No. 1168128

Principal Office

52 St Elizabeth Avenue
Bootle
Sefton
L20 6FA

Names of the charity trustees who manage the charity:

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
S. Calderbank			
S.A. Hunter			
P. Lappin	Chair		
J.R. Price			

Accountants

Sefton Council for Voluntary Service
Burlington House
Crosby Road North
Waterloo
Liverpool
L22 0LG

Bankers

HSBC UK
99-101 Lord Street
Liverpool
L2 6PG

STRUCTURE, GOVERNANCE AND MANAGEMENT

Type of governing document

Constitution

How the charity is constituted

Charitable incorporated Organisation

Trustee selection methods

Appointed by a quorate meeting of the Trustees properly notified as per our constitution and considered to have skills valuable to the charity

Additional governance issues

Veterans in Sefton have become embedded in the community, establishing links to multiple organisations, healthcare and council services, including housing, to ensure an integrated approach through Service Level Agreements, building relationships with local community service providers and employers.

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Below is a comprehensive list of all the active partners and originations that ViS work alongside:

- Sefton Metropolitan Borough Council (MBC), Investment in Housing Scheme – Commissioned Service
- Sefton MBC, Preventing Men’s Suicide Scheme – Commissioned Service
- South Sefton, Formby & Southport Clinical Commissioning Group (CCG)- Formal NHS Partnership.
- Invest Sefton- Sefton MBC- Business growth structure-Formal Agreement
- Sefton Council for Voluntary Service (CVS) -Business and sustainability advice Formal Partnership
- Spacehive- Crowdfunding platform- Formal Agreement
- Talking Matters Sefton-Mental Health-Formal Partnership
- Sovini Group(One Vision Housing), Housing. Service level Agreement - Formal Partnership
- My Space, Rehousing Veterans with needs – Formal Partnership
- Creative Change Housing (CCH) Housing-Rehousing Veterans with needs – Formal Partnership
- Riverside Housing-Rehousing Veterans with needs – Formal Partnership
- Launch Pad: Speke House-Housing Provider- Formal Agreement
- Liverpool City Waterfront, Pathways to Employment - Formal Partnership
- Complete Skill Solutions- Pathways into Employment- Formal Partnership
- Households into Work- Pathways to Employment, Veterans financial support and advice- Formal partnership
- Department of Work and Pensions (DWP)- Pathways into Employment- Formal Partnership
- The Royal British Legion- Veterans needs and welfare- Service level Agreement - Formal Partnership
- Armed Forces Bikers- Grant providers assisting veteran’s needs- Formal Partnership
- B- Skills Training-Pathways into Employment- Formal Partnership
- St Leonard's, Debt Advice Service - Formal Partnership
- Veterans Welfare Services-Welfare, pension and benefit advice-Service level Agreement - Formal Partnership
- The Recovery Circle, Dependency Programme - Formal Partnership
- The Rucksack Club, Well-fare & well-being residential Breaks - Formal Partnership
- Sale Sharks-activities- Formal Partnership
- Myerscough College- Myerscough specialises in education and training for the land-based and sports industries. Including horticulture, arboriculture and grounds maintenance skills
- Hope University - Psychologist placements.
- Southport College University Centre - Psychologist placements.

OBJECTIVES AND ACTIVITIES

Summary of the objects of the charity set out in its governing document

Veterans in Sefton will relieve the need of persons living in Sefton, Merseyside and surrounding areas, who are currently serving or who have served in the armed forces, regular and reservists, their families and dependents, by advancing any lawful charitable purpose at the discretion of the trustees and in particular but not exclusively by: -

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- Providing opportunities to participate in activities which promote their social inclusion;
- Providing counselling, advice and mentoring support;
- Promoting and protecting their health, mental health and well-being and well-being;
- Advancing the education and awareness of the public in the armed forces and; to promote and organise cooperation in the achievement of the above purposes.

Summary of the main activities in relation to these objects

The activity programme has been very successful this has mainly due the volunteers taking the lead in organising and facilitating the majority of day to day activities, these activities have included day trips, NAAFI Breaks, educational trips, such as western approaches and museums.

There have also been many camping trips over the year where the volunteers have worked alongside ViS staff to organise and execute. 2 main excursions to the Battlefields Normandy have taken place which have also been a great success.

Cost effective NAAFI Breaks

We have lessened the cost of our volunteer expenses over the past year by becoming more self-sufficient.

The NAAFI Breaks are by far our most attended activity, being populated by over 50 veterans and family members each week. At the beginning of the year a group of volunteers started selling bacon and sausage butties at the NAAFI Breaks, at a very modest price, the money generated by this helps to fund some of the volunteer's expenses and covers the cost of the minibus fuel on most of the days out.

Well-being retreats

Funding was secured to support Veterans Wellbeing Breaks at the Anabasis Mountain Club in North Wales. This provision was from Awards for All the project enabled groups of up to 10 Veterans to participate in 8 3-day visit, this project was hugely successful and over 80 veterans took part. Due to the success of this project funds were raised by veterans themselves to carry on this project on an ad hoc basis until March of this year we were successful in another Awards for All bid to carry this on.

The breaks are based on various individual and group structured activities. The break is supervised and coordinated by Veterans in Sefton's Operations Manager and supported by our Well-being Care team consisting of a fully qualified Psychotherapeutic Counsellor, a therapy dog and 2 of our highly skilled Befrienders/Mentors.

The benefits of being back with nature, fresh air and with the time and space for reflection and unobtrusive distraction has been agreed by Psychiatrists, Therapists, Clinicians and other Health Care professionals to dramatically promote mental health and well-being whilst maximizing recovery potential from Mental Health conditions (particularly PTSD, Stress, Anxiety and other Trauma related issues. This "Well-being Experience" is an integral part of the charity's objectives in the re-orientation of its user base back into society. Users of this Well-being Programme have loosely called it "The magic of Anabasis.

As an extra measure to gather reliable data for all participants complete a Patient Health Questionnaire-9 (PHQ-9. The PHQ-9 is a NHS 9-question instrument given to patients in a depressed or anxious mood) both prior to taking part in the retreat and a month after arriving back. The results have nothing more than astounding, all have reported in improvement in their mental and general health and wellbeing

Additional details of objectives and activities

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Veterans in Sefton have a Peer Support Group (PSG) within the Charity comprising 12 volunteers (all SU). The PSG is chaired by an individual for a 3-month period to ensure fair rotation. The PSG is the voice of the SU. The CEO or the Project Manager will attend the monthly meetings to answer any question and deliver immediate feedback. The minutes of the PSG meeting are presented at the Senior Management and Board meeting to ensure full disclosure.

Summary of ViS volunteering roles = 24

They comprise of:

2 Fully qualified Psychotherapeutic Counsellors to work alongside the Wellbeing Manager 20 each week per person- weekly total 40 hours

1 Art therapist to run 2 art therapy sessions per week. Total weekly hours 6

4 Fully trained Development Officers who work alongside the Operations Manager to carry out Needs Assessments and deliver Personal Centred Plans for Veterans in need of support. 10 hours each week per person- weekly total 40 hours.

1 Activity Coordinator responsible for the day to day activities of Veterans in Sefton including the minibus trips and coordination with outside organisations who wish to use the minibus. weekly total 20hours

2 Kitchen staff Role provide bacon and sausage butties at the NAAFI Breaks and provide any catering beyond the NAAFI Break, i.e. buffets and BBQs to eliminate the need for expensive outside catering. Along with the general volunteers they will be catering for the Veterans in Sefton Christmas dinner this year, which had 40 seated. 10 hours each per week. Weekly total hours 20

6 Minibus drivers to drive and maintain the minibus. Average 2 hours per week each, depending on the length of a day out Weekly total 12 hours

4 Allotment coordinators, responsible for the maintenance and activity programme on the allotment. 5 hrs each week per person, Weekly hours 20

4 General Volunteers to assist with the daily running of the charity across all areas of general help. 2 hours each per week. Weekly hours total 16

In total ViS volunteers contribute a total of weekly hours total 174

ACHIEVEMENTS AND PERFORMANCE

Summary of the main achievements of the charity during the year

The data to form this report is derived from a range of programme records which principally include the number of individuals referred to Veterans in Sefton (ViS) all additional data about: age, postcode and the origin of the referral (i.e. through media, social media, NHS sources, etc). has also been collected and is available on request.

Analysis of this data has informed our forecast of trends and future needs. On this basis we have been able to conclude our annual service delivery demand show the increase over the 4 years of funding.

It should be noted that since we captured data to show where individuals have been referred from, this information helped ViS to improve our engagement strategy and gives us a natural path of development to improve our reach. For example, over the funding period over 55% have engaged as self-referrals via Facebook or other types of social media, but we have continued to noticed that our figures are still as low as 5% from GPs and other NHS sources. This data has allowed ViS to approach the appropriate agencies to improve this data.

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In addition, ViS has continued actively support individuals by making referrals to complimentary and support services. Data has been recorded to show these details. The data also reflects individual referrals as well as multiple referrals of individuals who have sought our service. (For example; Veteran A refers to our charity, a needs assessment is carried out, it is identified that he/she requires assistance/guidance with mental health, dependency and financial issues, we would then refer the individual onto the appropriate organisations or produce a support strategy to suit the needs that requires addressing).

Veterans in Sefton's Wellbeing Manager has counselled over 500 individuals across this reporting period, working very closely with organisations such as the Sefton Integrated Care Teams Care Co-ordinators, veterans in Mind NHS, Op Courage (NHS funded Veterans programme) Local GPs and MerseyCare. It was extremely notable to hear feedback from the individuals taking part in the wellbeing programmes that they found the previous experience a real benefit in helping them to cope with their "demons". They felt they had some tools to use for themselves and a support group to share things that went well and not so well. They felt a upturn in mood state in the after engaging with our well-being programmes they felt a "pinning" for that social scaffolding. They also reported experiencing a sense of "self-actualisation" in having some self-help concepts they could utilise in their life journey and build self-confidence. Many of the attendees expressed a desire to return to Employment.

There are an estimated 5 million veterans in the UK, an estimated 27,000 of whom reside in Sefton, Merseyside, and a further 20,000 personnel leave the forces each year. When staff leave HM Forces, their healthcare transfers from the military to the NHS, a system military personnel are not familiar with. Only around 6% of regular service personnel are discharged annually for mental health reasons. However, a large number of veterans develop mental health problems after leaving service, many of whom will be experiencing PTSD. (Iversen et al 2005).

Until recently, little was known about these veterans. What we know is that only half of those experiencing mental health problems sought help from the NHS, and those that did were rarely referred to specialist mental health services.

We believe the key to unlocking the issue of poor mental health is the in-depth needs assessment and finding the base cause of the issue, we have the time to unravel the bits and pieces and strike at the core. In many cases it is either poor social inclusion, financial issues, dependency issues, housing or homelessness, in nearly all cases it is a complex mixture of them all.

Following the very successful additional funding from the Armed Forces Covenant Trust Positive Pathways programme to support the Project Manager post. Tom Trainer, Head of Impact from the Trust, wrote a detailed case study on the project (please see the links attached at the end of question).

At ViS we now deliver a wide range of services for veterans, serving personnel and their families, which includes: mentoring and befriending services; health and wellbeing advice and activities; housing support; financial advice; employment support; volunteering opportunities; early intervention psychological support; social events and activities that promote social inclusion and reduce isolation and anxiety. The organisation is now the only approved provider of services to veterans in the Sefton area by the local council and other statutory agencies. We have now been made a Strategic Partner of Sefton Council and sit on the Sefton Armed Forces Community Covenant's (SAFCC) Board, chaired by Sefton's Armed Forces Champion, Councillor Carragher, who is now also a Trustee to ViS., This links us directly with the SAFCC including the veterans' leads for the Police, Ambulance Service, Fire Department, Education, Health, Justice and Law.

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FINANCIAL REVIEW

We fund raise constantly to ensure we have sufficient unrestricted funds to cover our operating costs. We adjust expenditure inline with income.

Restricted funds are used for the purpose given and within the time period stated by the provider. These are not considered to be reserves.

DECLARATION

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

A handwritten signature in black ink, appearing to be 'S.A. Hunter', with a long horizontal stroke extending to the right.

S.A. Hunter
Trustee
15 September 2023

Veterans in Sefton

Independent Examiners Report

Independent Examiner's Report to the trustees of Veterans in Sefton

I report to the trustees on my examination of the accounts of Veterans in Sefton for the year ended 31 March 2022.

Responsibilities and basis of report

As the charity's trustees 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 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 which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts do not accord with the accounting 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.



Anthony Deegan

MAAT

Sefton Council for Voluntary Service

Burlington House

Crosby Road North

Waterloo

Liverpool

L22 0LG

15 September 2023

Veterans in Sefton
Receipts and Payments Account
for the year ended 31 March 2022

	Unrestrict ed funds 2022 £	Restricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Receipts from:				
Donations, legacies and similar income	19,254	-	19,254	28,500
Grants	-	81,981	81,981	135,321
Fundraisin g	10,728	-	10,728	-
Total gross income	29,982	81,981	111,963	163,821
Total receipts	29,982	81,981	111,963	163,821
Payments on:				
Charitable payments	3,305	11,276	14,581	13,626
Charity costs	19,544	107,311	126,855	110,916
Total gross expenditure	22,849	118,587	141,436	124,542
Total payments	22,849	118,587	141,436	124,542
Net of receipts/(payments)	7,133	(36,606)	(29,473)	39,279
Transfers between funds	-	-	-	-
Cash funds last year	13,046	60,503	73,549	34,270
Cash funds this year end	20,178	23,897	44,075	73,549

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Statement of Assets and Liabilities
at 31 March 2022

Charity No. 1168128

	Unrestricted funds 2022 £	Restricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Cash funds				
Current accounts	20,178	23,897	44,075	73,549
Total cash funds	<u>20,178</u>	<u>23,897</u>	<u>44,075</u>	<u>73,549</u>

Signed by the trustees on 30 September 2023

And signed on their behalf by:



S.A. Hunter
Trustee
30 September 2023

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Notes to the Accounts

for the year ended 31 March 2022

1 Accounting policies

Basis of preparation

The financial statements have been prepared on the 'Receipts and Payments' basis.

Fund accounting

Unrestricted funds	These are available for use at the discretion of the trustees in furtherance of the general objects of the charity.
Designated funds	These are unrestricted funds earmarked by the trustees for particular purposes.
Revaluation funds	These are unrestricted funds which include a revaluation reserve representing the restatement of investment assets at their market values.
Restricted funds	These are available for use subject to restrictions imposed by the donor or through terms of an appeal.

2 Income from grants

	Restricted funds	Total 2022	Total 2021
	£	£	£
Lottery Main Grant	78,901	78,901	78,901
Covid 19 Response Grant	-	-	8,370
LCR Community Foundation Grant	-	-	8,800
Armed Forces Covenant Grant	-	-	33,250
SCVS Winter Access Grant	3,080	3,080	-
NHS GWW FT Grant	-	-	6,000
	<u>81,981</u>	<u>81,981</u>	<u>135,321</u>

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Detailed Receipts and Payments Account

	-	10,400	10,400	10,342
General administrative costs				
Bank charges	15	-	15	-
Equipment expensed	394	-	394	2,485
Equipment repairs and maintenance	320	-	320	-
General insurances	-	973	973	1,464
Postage and couriers	65	-	65	-
Software, IT support and related costs	-	2,496	2,496	3,948
Stationery and printing	193	-	193	-
Subscriptions	940	-	940	390
Sundry expenses	60	-	60	-
Telephone, fax and broadband	-	3,455	3,455	2,543
	1,987	6,924	8,911	10,830
Legal and professional costs				
Accountancy and bookkeeping	996	-	996	702
Other legal and professional costs	-	-	-	200
	996	-	996	902
Total gross expenditure	22,849	118,587	141,436	124,542
Total payments	22,849	118,587	141,436	124,542
Net receipts (payments)	7,133	(36,606)	(29,473)	39,279
Transfers between funds	-	-	-	
Cash fund last year end	13,046	60,503	73,549	34,270
Cash fund this year end	20,178	23,897	44,075	73,549