

# DORSET MENTAL HEALTH FORUM

England & Wales · Charity number 1169215

## Details

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**Other names** DMHF

**Status** Registered

**Legal form** CIO

**Registered** 2016-09-16

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** Dorset Mental Health Forum  
29 Durngate Street  
Dorchester  
DT1 1JP

**Phone** 01305 257172

**Email** [admin@dorsetmentalhealthforum.org.uk](mailto:admin@dorsetmentalhealthforum.org.uk)

**Website** [www.dorsetmentalhealthforum.org.uk](http://www.dorsetmentalhealthforum.org.uk)

## Activities

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**Objects:** TO PROMOTE AND PROTECT MENTAL HEALTH FOR THE PUBLIC BENEFIT, INCLUDING BUT NOT EXCLUSIVELY BY: SUPPORTING THE RECOVERY OF PEOPLE EXPERIENCING MENTAL DISTRESS, BY CREATING OPPORTUNITIES FOR PEOPLE TO RECONNECT WITH THEIR OWN STRENGTHS AND RESOURCES, IN ORDER TO BUILD THE LIVES THEY WISH TO LIVE. CHALLENGING DISCRIMINATION AGAINST PEOPLE EXPERIENCING OR AFFECTED BY MENTAL DISTRESS BY MODELLING THE VALUE OF LIVED EXPERIENCE EXPERTISE, INCLUDING REPRESENTATION AND INVOLVEMENT IN THE IMPROVEMENT AND SHAPING OF MENTAL HEALTH SERVICES. ADVANCING THE EDUCATION AND UNDERSTANDING OF THE GENERAL PUBLIC IN ALL AREAS RELATING TO MENTAL HEALTH BY PROMOTING THE PRINCIPLES OF MENTAL HEALTH, WELLBEING AND RECOVERY THROUGH COPRODUCTION AND RECOVERY EDUCATION. DEVELOPING THE SKILLS, CAPACITY AND OPPORTUNITIES TO BUILD SOCIALLY INCLUSIVE, EQUITABLE AND RECIPROCAL COMMUNITIES WHICH ACTIVELY SUPPORT GOOD MENTAL HEALTH.

**Activities:** The Dorset Mental Health Forum is a local peer led charity, which promotes the principles of wellbeing, recovery and coproduction through partnership working and providing recovery orientated partnership and peer led services.

## Classification

- **How:** Provides Services, Provides Advocacy/advice/information, Other Charitable Activities
- **What:** Education/training, Disability, Economic/community Development/employment, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** Children/young People, Elderly/old People, People With Disabilities, The General Public/mankind

## Geography

- Bournemouth
- Dorset
- Poole

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£1,455,487	£1,492,923	£1,295,401	68
2024-03-31	£1,489,331	£1,410,032	£1,332,837	72
2023-03-31	£1,433,108	£1,444,809	£1,253,538	76
2022-03-31	£1,544,580	£1,076,395	£1,265,239	77
2021-03-31	£1,186,147	£941,466	£797,054	72

## Trustees

Name	Role	Appointed
Alison Chorley		2022-11-24
Arthur Merchant		2019-10-01
David Christopher Pain		2025-11-27
Keith Thomas Phalp		2025-11-27
Lesley Jane Haig		2025-11-27
Peter Locke Lovibond		2019-10-01
Sorrelle Jessica Ford		2022-11-24
Stephen Webb		2025-11-27
Timothy Robin Harry Mr		2022-11-24

**DORSET MENTAL HEALTH FORUM**

England & Wales - Charity number 1169215

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# Accounts

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# Welcome from our Chair

The Trustees have pleasure in presenting their Annual Report and the financial statements for the year ended 31 March 2025.

We introduce our Annual Report for 2024/25 by first thanking and celebrating our inspirational workforce, who bring their own life and lived experience every day to their work as they model Recovery and influence people's understanding of mental health. We could not have achieved such impact for people in Dorset this year without the dedication, commitment and continued hard work of our whole workforce.

We would also like to give special thanks to Ann Abraham, recently retired as Forum Chair, for her steadfast leadership over the last four years.

The last year has been one of more challenge, change and transformation across Dorset. It continues to be a difficult time for people and communities, with increased pressure on local mental health and social care services.

During 2024/25, guided by our new Strategy, we are very proud to have responded positively to the ongoing challenges and continual change around us, evolving and structuring our work and activities to meet and support people on their own terms, educating and enabling people, services and systems to celebrate and build on what is strong, in order to meet the challenges of today and those of the future.

There has been a continued focus on collaboration and integration throughout mental health services and across the Dorset System. This includes a commitment to embedding partnership working with the broader voluntary and community sector within local mental health services. We have been delighted to bring our expertise and support to this

significant and ongoing transformation work, facilitating coproduction and ensuring that people's voices and perspectives are always heard and integrated throughout the ongoing review, shaping and design of local services. By supporting people and local organisations to share their voices, we have continued to build capacity within services and communities.

Looking ahead into 2025/26, we are excited to build on the developments and achievements of recent years, guided by the needs of beneficiaries and stakeholders. We believe that our work is even more relevant and vital today and for the years ahead and we remain deeply committed, agile and passionate about driving social and cultural change within services and communities across Dorset.



**Tim Harry**  
Chair of the Trustee Board



**Becky Aldridge**  
Chief Executive



# Our journey so far

## Having a Voice

**1991**

Forston Clinic opens

**1992**

Herrison Hospital (former asylum) closes and site sold for luxury flats

**1992**

West Dorset Mental Health Forum established

**2001**

Administrator recruited

**2001**

Service user involvement established

## Involvement to Partnership

**2003**

Advocacy Service and Forum moved to independent premises

**2006**

Expand to Dorset Mental Health Forum

**2007**

Awarded Big Lottery Funding

**2008**

Sports and Social Programme launched

**2009**

Dorset Wellbeing and Recovery Partnership (WaRP) established

**2011**

WaRP ImROC Demonstration site status

**2012**

Forum Employment Service launched

**2012**

Recovery Education Centre launched

**2012**

Hidden Talents launched

## Education

**2015 and 2017**

CQC validate WaRP work

**2016**

Acute Care Pathway Review

**2018**

Retreat East opens

**2019**

Retreat West opens

**2019**

Mental Health Integrated Community Care (MHICC) Review commences

**2019**

Discovery Project launched

**2019**

Dorset Work Matters launched

**2020**

Dorset Open Door launched

**2024**

Complex Trauma Pathway and Flourish project launched



# Our Impact

**58,750**

hours of Lived Experience expertise, to increase understanding, model Recovery and support people to build lives they wish to live.

**15,781**

Recovery focused interactions with people supporting them to have a voice, agency and control.

**12,047**

opportunities for people to have agency in building their lives.

Lived Experience leadership and representation to

**77**

decision making boards, steering groups and system meetings, participating in

**980**

meetings during the year.

We collaborated with

**246**

community organisations during the year, influencing local services with people's voices and experiences.

**429**

Recovery Education courses delivered in partnership throughout the year.

**224,712**

social media impressions and

**34,530**

visitors to our websites.

# Strategic Report

## About Us

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and coproduction.

We believe that experiencing mental ill health and managing one's symptoms, should not preclude or diminish a person's right to enjoy all of the opportunities that life can provide, as with managing any physical health condition. This is one of the aspirations that sits behind all our work, along with a passionate desire to challenge the stigma, prejudice and discrimination that still exists around people's experiences of mental health problems.

We have contact with many people who do not want to be defined by their illness or diagnosis, despite managing serious long-term conditions. Many people can lead meaningful and satisfying lives, others require more support to do so, often having been supported by services for most of their lives.

Recovery is at the heart of all that we do, enabling and promoting the value and efficacy of people doing for themselves what they have traditionally been reliant on services to provide, encouraging an environment where people work in partnership with providers of care and treatment, in order to build the lives they wish to live.

“**Recovery is not about 'getting rid' of problems. It is about seeing people beyond their problems - their abilities, possibilities, interests and dreams - and recovering the social roles and relationships that give life value and meaning.**

*Repper and Perkins, 2003*

## Our Vision

A world that understands mental health: where people and communities can enjoy good mental health, citizenship, shared humanity and appropriate support when they experience emotional distress and trauma.

## Our Mission

To increase understanding of mental health through lived experience expertise, support Recovery and develop capacity within services and communities to bring about change.



## Our Values

Guide everything that we do:

- **Honesty** is our foundation stone.
- Our work requires **Courage**, to be vulnerable and to grow.
- We know the power of **Compassion**.
- **Respect** for who we are is a human right.
- Having **Integrity** means living our values and staying true to our purpose.

## Our Beliefs

We believe:

- That people with lived experience of mental health problems have a wealth of specialist knowledge, valuable expertise and experiences.
- In the effectiveness of partnership working in the design and provision of services.
- That everyone has an equal right to enjoy all the opportunities that life provides.
- That there is 'no health without mental health' and that 'mental health is everyone's business'.
- That individuals and communities hold many of their own solutions.
- That hope, mental health and wellbeing are essential to us all.



# Activities and Objectives

## What we do

We are a community of people who have experiences of mental distress and managing a mental health condition, experiences of trauma, living with long term health issues or caring for someone who is in emotional distress. Our lived experience infrastructure brings the collective voice of lived experience expertise to the heart of real and sustainable change across Dorset.

Utilising our lived experience expertise, we influence and facilitate significant culture change around mental health in Dorset, as well as undertake a range of specialist independent and partnership activities to fulfil our mission and objectives, supporting individuals, communities and local systems to understand mental health. Intrinsic to this work is modelling Recovery and developing capacity and capability within individuals and communities, through Recovery Education and Coproduction.

## Social Connection

Our Social Connection Programme works with individuals and organisations to offer different activities across Dorset, developing connections and helping people to build a life within their local community.

## Advocacy

We support people to have a voice and exercise their rights in matters that directly affect their lives, including times when they may be subject to the Mental Health Act.



## Dorset Wellbeing and Recovery Partnership (WaRP)

The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised, formal partnership between the Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust, putting lived experience expertise hand in hand with professional and technical expertise. The Partnership promotes coproduction and drives culture change across the Integrated Care System in Dorset.

**Together the Dorset Wellbeing and Recovery Partnership provides the following projects:**

### Dorset Recovery Education Centre

Dorset Recovery Education Centre (REC) provides Recovery focused, educational opportunities that enable people to identify their strengths, find hope and build skills, to reframe their experiences of trauma and emotional distress.

### Discovery Project

Discovery Project works closely with schools and youth projects to facilitate participation and create mechanisms for young people to have a voice within local services and their communities.

### Dorset Open Door

Dorset Open Door is a collaborative, multi-agency bereavement support and signposting service for people in Dorset who have been bereaved by trauma or suicide.

### Retreats

Retreats provide a collaborative approach to crisis support in Dorset, through open access safe spaces for people to make sense of their distress in times of self-defined crisis.

### Peer Specialists

Peer Specialists within services are staff who intentionally utilise their lived experience of mental health issues, trauma, and emotional distress, to support Recovery oriented practices within local services and broader communities across Dorset.

### Carers Project

Carers Project supports the development of lived experience voices of carers, particularly people who have been bereaved by suicide or cared for people who have experienced complex trauma.

### Dorset Work Matters

Dorset Work Matters provides an Individual Placement and Support (IPS) employment service to people accessing secondary Mental Health services, as part of a broader ambition to create meaningful vocational opportunities for people in Dorset.



# Strategic Goals for 2024-2029

Development of our new Strategy for the period 2024-2029, has been an important workstream during the year, giving the organisation a clear focus and road map

for the years ahead, as we work to influence change and deliver impact across three strategic areas:



## Education

People's understanding of mental health and the impact of trauma will be increased through Recovery Education and Coproduction.



## Agency

People will have agency and be supported and enabled to live the lives they wish to live, beyond services, within their communities.



## Influence

Local services and communities will be influenced, shaped and transformed with the collective voice of Lived Experience.

A close-up photograph of a person's hands holding a light blue sticky note. The person is wearing a dark blue denim jacket with yellow stitching and a white and blue striped shirt underneath. The sticky note has the text "Making ... a Difference" written in blue ink, with a blue arrow pointing to the right below the word "Difference". The person's right hand is wearing a silver ring with three diamonds. The background is slightly blurred, showing the texture of the denim and the striped shirt.

Making ...  
a  
Difference  
→

# Our 2024-2029 Strategy is underpinned by four quality priorities:

We continue to grow and develop our lived experience infrastructure, creating opportunities and mechanisms for people to make sense of and reframe their

experiences, utilising their learning to model Recovery, increase understanding, give hope and support to others and to influence culture change in Dorset.

## Proficient workforce

Developing a diverse, influential, inspiring and thriving workforce.

## Sustainability and Efficacy

Innovating, diversifying funding, developing partnerships.

## Engagement in Communities

Gathering voices, extending reach, and growing contagion.

## Impact and Evaluation

Demonstrating impact, building evidence of change being made.



# Achievements and Performance during 2024-2025

## Lived Experience Infrastructure

Our diverse lived experience infrastructure brings an alternative perspective around mental health to local services and communities, challenging stigma through lived experience expertise and coproduction.

Our courageous and inspiring workforce promote and model the principles of Wellbeing and Recovery in various roles and settings throughout the organisation, local services and across Dorset. Our staff are employed in many different roles, utilising their lived experience and technical expertise. Employment is an intrinsic part of our people's own Recovery journeys, as they discover and develop skills and resilience to build the lives they wish to live, focusing on their strengths, rather than deficits, "what's strong, rather than what's wrong".

Maintaining a psychologically safe, values-based workplace and culture throughout our organisation is paramount for our work. Many of our workforce have experienced periods of crisis and trauma in their lives.

Our people demonstrate courage, tenacity, and compassion within their work and in support of their colleagues every day. Developing capacity, resilience, and sustainability across the organisation to support the workforce and to fulfil our purpose and objectives as a charity continues to be our priority.

During the year, we have further developed pathways for people exploring peer work and opportunities to contribute to the Forum's work, providing a more diverse selection of job roles, that offer supported and substantive employment. We continue to encourage career progression for staff, developing managers and focusing on Lived Experience Leadership. Some people have grown and been promoted within the Forum; others have gained a good understanding of their transferable skills and moved on to develop diverse careers in different sectors across Dorset.

There continues to be significant transformation across the Dorset System, including ongoing review of health and

social care workforce requirements. During recent years, the Forum has been able to contribute to System wide workforce planning, including demonstrating the value and importance of a Lived Experience infrastructure, promoting different ways of working and bringing about culture change across Dorset. There is growing appetite across Dorset to create opportunities and space for people to bring their lived experienced perspectives to a range of new and emerging roles.

Gaining understanding and learning from the experiences of our staff and our beneficiaries is core to everything that we do. Through ongoing feedback and engagement with our staff, we gain further understanding of how best to support people's emotional health in the workplace. This enables us to articulate to other employers and organisations, the fundamentals required to support the mental health and wellbeing of all staff in the workplace.

Our workforce delivered **58,750** hours of Lived Experience expertise across Dorset during the year.

Growing our collective voice is fundamental to the Forum's work. This year we have increased our focus on community engagement, developing responsive, local opportunities for people to contribute their voices and perspectives, to local change. We understand the importance of reciprocity and contribution within people's personal Recovery journeys and that sharing your story is an individual process that takes courage and at times, specific support.

It has been important to reach out and create opportunities for people who may not feel able or confident to contribute their experiences, to be heard, as new local mental health services are being mobilised. The way that people can access services and support locally is transforming and evolving.

Through different engagement activities, beneficiaries are sharing the things that matter most to them, within their lives and communities. This underpins and shapes the Forum's activities within the Dorset System.



**“ I learned what my values are and this helped me to identify what to take with me to grow personally and professionally from here.**

*Staff Leaver*

# Strategic Goal: Education

People's understanding of mental health and the impact of trauma will be increased through Recovery Education and Coproduction.

Our experiences are the core of what makes us human. Sharing our stories enables us to connect with each other, regardless of our role, identity or background. Recovery Education helps us to make sense of our experiences and to learn together, as we move forward to create a life that has meaning and purpose for us.

In 2024/25 we celebrated 15 years of the Dorset Wellbeing and Recovery Partnership, a formal partnership between the Forum and Dorset HealthCare University NHS Foundation Trust, putting Lived Experience expertise hand in hand with clinical, professional or technical expertise to facilitate change. Much of the Forum's work is delivered in partnership, modelling how power can be shared and all people can be valued equally as citizens and contributors, bringing about cultural change within Dorset.

This first year of the Forum's new five-year Strategy has provided an opportunity to revisit the basic principles of Recovery and to layer our learning, giving us renewed energy and focus in influencing and advocacy for social justice.

We know from our own and other people's experiences that the impact of trauma is far reaching. The things that happen to us in our lives matter and they influence

and shape who we become as people, how much agency and control we feel we have in our lives and in our relationships, networks and employment. We are delighted that there has been a significant expansion in the Recovery Education Centre (REC) this year, with a specific focus on accessibility and inclusion for people who have experienced complex trauma in their lives. This is important given the detrimental impact of particular diagnostic labels and unfortunately, the stigma that exists within mental health services, which can at times result in more harm for individuals who have already experienced untold trauma and distress.

New courses including Exploring Emotions, Building Safer Connections and Community and Belonging have provided space for people to build understanding, acceptance and self-awareness while benefiting from peer-to-peer learning and support.

Alongside Recovery Education in the REC, we have continued to build and evolve our staff training offer across the Dorset System, supporting the development of new services such as Access Mental Health, embedding trauma informed approaches, alongside delivery of Mental Health Awareness training.

Courses including Our Mental Health and Safety Now bring Lived Experience perspectives and expertise alongside clinical and technical expertise, challenging perceptions and building understanding, which is influencing staff practice and cultural change.

In 2024/25, we have been utilising our Lived Experience of difference to build understanding around neurodiversity and neurodivergence and to challenge stigma. When people experience the world differently, whatever their diagnosis or specific challenges, there can be additional barriers and increased stigma, impacting the person being heard and impeding their access to appropriate support. We believe that defining people by a diagnostic label can be largely unhelpful and that we all have the right to aspire and the ability to thrive, with the right support.

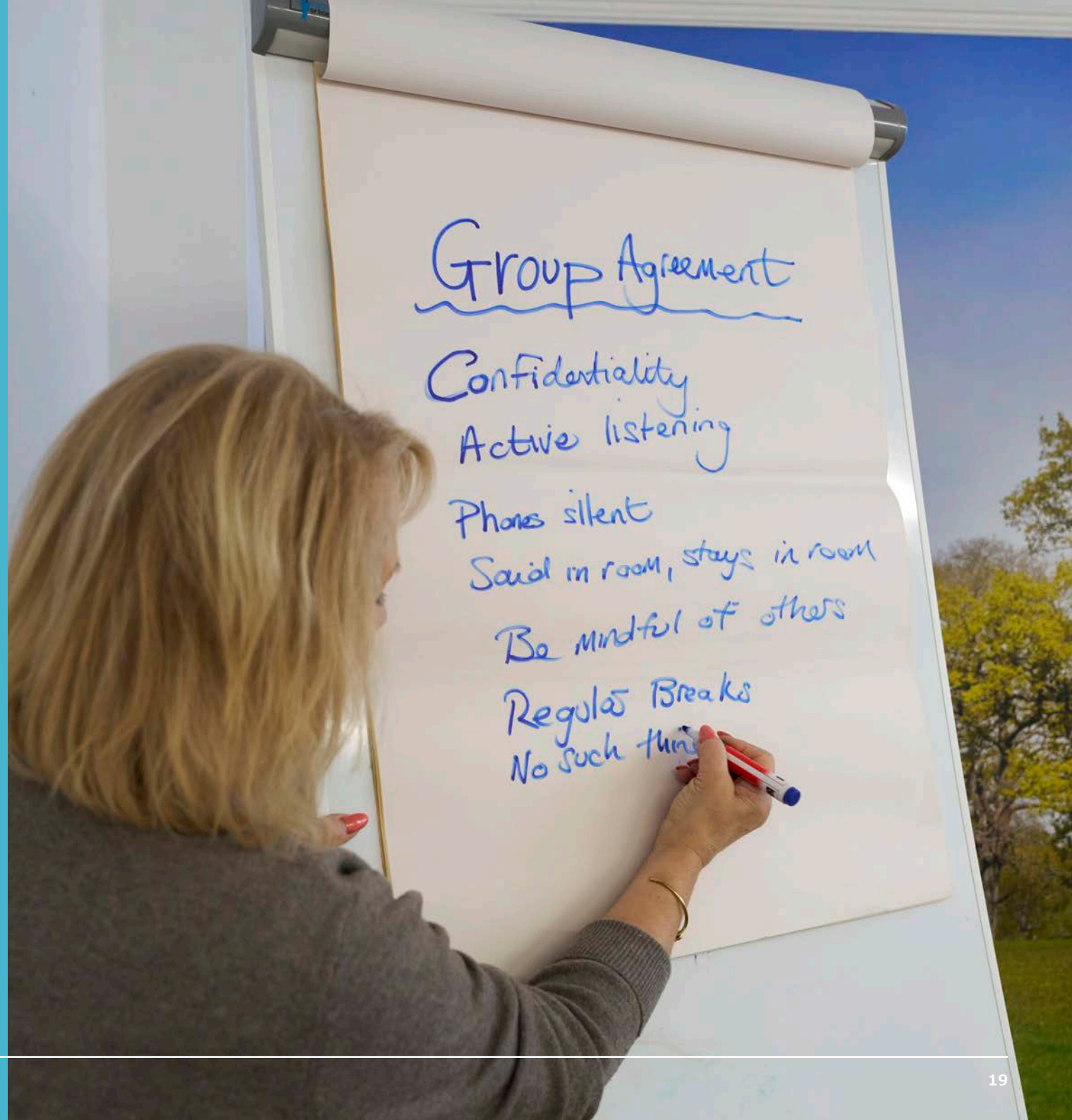
During the year, we have worked in partnership to reduce environmental impacts for people with sensory needs and addressed communication barriers for people. This work has informed the development of Recovery Education and peer support, specifically focused on people with diagnoses of Autism and ADHD and with challenges with food and self-harming.

We have also partnered with Dorset Council to codevelop the local implementation of Oliver McGowan Training (OMT) which aims "to save lives by ensuring that health and social care workforce have the right skills and knowledge to provide safe, compassionate and informed care to autistic people and people with a learning disability".

“

At my lowest I did not realise how my mental health was affecting my life. As a result of this programme, I have come out of the other side of my mental depression. Previously, I was waking up and wishing I had not woken up (I was not suicidal, I just did not want to live) - I did not think I would get back to being me, but I have.

*Participant in Flourish Trauma Programme*



# Impact

This year, through Recovery Education, Lived Experience expertise and sharing people's stories and perspectives, we have increased understanding around mental health and Recovery.

**1,478** new students to the Recovery Education Centre.

**2,624** Recovery focused conversations within inpatient and community settings.

**1,567** staff across the Dorset System received training and Recovery Education.

**862** contacts with people impacted by suicide and complex bereavement.

# Strategic Goal:

## Education

People's understanding of mental health and the impact of trauma will be increased through Recovery Education and Coproduction.

### Public Health

In 2023, just over 6,000 people died by suicide in England and Wales. For every death by suicide, it is estimated that 135 people will know and be impacted by each loss of life. Healthcare staff and charity workers make up a significant proportion of those impacted by suicide and sudden death. This is a public health issue and an area that we have been focusing on during 2024/25.

This year, we have codesigned and codelivered Suicide Prevention Level 2 training and begun development of Level 3 training. Alongside this, we have worked with people who have survived or been bereaved by suicide to develop resources focused on safety. We have developed a network of organisations working closely together to provide timely and appropriate support for people in Dorset who are impacted by sudden death and provided peer support to people who have been bereaved by suicide.

Our Young Peers and Discovery Project Team have worked with schools and with young people directly to make sense of loss and to explore what safety means for them and their families.

### Equality and Difference

2024/25 has been a year of conflict and unrest across the world. Political volatility and a rise in pejorative rhetoric, alongside continued austerity has left some communities fractured. The impact on mental health and wellbeing is significant and there is a growing sense of unease amongst marginalised groups, creating further isolation. We have intentionally focused on creating opportunities for integration, using Lived Experience and stories to build understanding and promote social connection.

Attendance from the migrant community at our Sports and Social groups increased this year, as the universal language of football brought communities together, enabling us to break-down barriers and create more understanding of what connects us all as humans. We have also expanded partnerships with organisations such as International Care Network (ICN) to remove barriers for individuals to access Recovery Education and benefit from peer support.

Our Peer Specialists continue to work within mental health services and teams across Dorset, bringing Lived Experience perspectives, having Recovery focused conversations and providing peer support to people at times when they are particularly unwell and in hospital. During 2024/25 we have provided Lived Experience expertise at different levels to Dorset's implementation of the nationally driven Culture of Care Programme. This Programme firmly values Lived Experience perspectives and aims to ensure that all inpatient care is Trauma Informed, Autism Informed and Culturally competent.



**I thoroughly recommend the training to everyone. The training is just what the title suggests, 'Our Mental Health' .... the content can be used to help yourself, your friends, family, colleagues and the people we support and work with. I'm actively encouraging people to attend so that they can hopefully benefit in the same way that I have. Thank you!**

*NHS Staff Member*

## Strategic Goal:

# Agency

People will have agency and be supported and enabled to live the lives they wish to live, beyond services, within their communities.

When we speak to people about what it means to have agency, they talk to us about the importance of connection, having control in their lives and the right and knowledge to develop aspiration and hope for the future. They describe having a life worth living and wanting the opportunity to enjoy relationships, appropriate housing, safe and welcoming spaces, employment, learning, spirituality, meaning and purpose. Our work during 2024/25 has been guided by this, walking alongside individuals to explore what matters most to them, enabling people to explore and identify a life worth living on their own terms.

Over the past few years, we have been working in partnership with mental health services and local community organisations, to codesign support that is more integrated and accessible for people within their local communities, ensuring timely and local help when people are struggling with their mental health and wellbeing.

These changes alone do not address the barriers and isolation that people continue to experience at times within their local communities. For people to recover a life that they deem to be worth living, they need to find a place to belong, to develop networks and to find meaning and purpose on their own terms.

These aspects are not the province of mental health services and are more about what happens for people within communities themselves. The Forum continues to utilise its collective voice and Recovery Education to promote Recovery and build capacity within these communities across Dorset.

During 2024/25 we have had over 10,000 attendances across our Sports and Social Connection programme. We facilitate Sports and Social activities on a neighbourhood level and our team are embedded within local communities. We use relational approaches and our Lived Experience expertise to build trust and confidence. During the year we have offered groups that have helped people to connect with nature through gardening, develop teamwork and social skills through football and sports activities, and build fitness through gym groups and walking, as well as holding regular social groups.

## Connection

Access to Lived Experience at the point of transition from service to service, service to home, or through life stages, helps people to find hope for the future. Peers act as a bridge, inspiring hope and facilitating connection with groups and networks in people's local neighbourhoods and communities. People tell us that meeting someone who has been on a similar journey and who speaks your language, enables them to see that Recovery is possible for themselves and to move forward.

In 2024/25, our peer team worked alongside clinicians and support staff in a number of NHS services including Hospitals to Home, Psychiatric Liaison, Rehabilitation and the Criminal Justice Liaison and Diversion services. We continue to support people throughout their Recovery journeys and our experiences enable us to sit alongside people when they are at their most vulnerable and in crisis. Peers working in Retreats as part of the Access Mental Health pathway, skillfully facilitate conversations that enable people to connect with their own strengths and values, to begin to move forward.

## Collaboration

Over the last 15 years, we have evolved our understanding of Coproduction, partnership working and the importance of sharing power. This learning has enabled us to work with other organisations across Dorset and beyond, facilitating conversations and undertaking learning activities that build understanding and ignite change. Much of this work involves supporting people and beneficiaries who access projects and services to have a voice. Organisations we have worked with this year include Dorset ICS, Dorset Council, BCP Council, Help and Care, Bournemouth University, Dorset Police, Homewards, Hampshire and Isle of Wight Healthcare, Poole College and International Care Network.



The groups have given me a purpose to get up and get ready for the day. It's been helpful having people to socialise with and to talk / support one another if we need. It's opened up my world that felt so closed off when I was going through some really rough times, and I look forward to attending the groups.

*Attendee at Forum Social Group*



# Impact

This year, through Sports and Social Connection activities, Employment support and access to Lived Experience expertise in different settings, we have supported and enabled people to be active citizens and to have agency to build their lives beyond their mental health experiences.

**1,038** groups and activities within local communities across Dorset.

**246** collaborations with community groups and organisations.

**812** interactions with young people and families.

**735** people accessing Employment support.

# Strategic Goal:

## Agency

People will have agency and be supported and enabled to live the lives they wish to live, beyond services, within their communities.

### Citizenship

The right and ability to participate as equal citizens within our communities is essential if we wish to develop agency and have more control in our lives. To do this, we need access to education, vocation and employment opportunities and to resources. During 2024/25 we have expanded our reach through the Partnership employment service, Dorset Work Matters (DWM). DWM is an IPS (Individual Placement and Support) service that works with people who are under the care of secondary mental health services. The service was recognised and celebrated this year as the top performing IPS service in the Southwest and has been awarded an IPS Grow Quality Mark.

The Forum continues to focus on ensuring that aspiration and access to work is explored throughout a person's Recovery journey and also that support is offered to people who have work but are struggling to maintain their jobs due to deteriorating mental health and wellbeing. This work includes linking people into Recovery Education and primary care support such as GPs and Steps to Wellbeing, as well as providing advice and training for employers on how to provide appropriate conditions to support staff wellbeing and to enable people to thrive at work.

There are increasing challenges for young people to cope with in today's world. The world of social media, societal unrest and increasing pressure to succeed in education are all impacting young people in different ways. As a result, there is increased demand for mental health services for young people, rising acuity and growing discomfort in schools. This year we have focused on creating space for young people to make sense of the world around them on their own terms.

By working on a 1-1 basis with young people in crisis and providing courses such as Tackling Loneliness & Making Connections for Young Adults (18-25) and Managing Anxiety as a Young Adult (18-25), we are able to bring the perspective of our Young Peer workforce alongside clinical teams to amplify the voices of young people, supporting and enabling them to articulate and contextualise their experiences for themselves.



**N was referred for peer support on discharge from hospital and described feeling socially isolated and alone. She was concerned for her Recovery, if she was continually exposed to activities involving alcohol and drugs. N bravely shared her experiences and why she had self-medicated with substances. Through peer support N was able to talk about friendships, a love for baking, arts and crafts and how much she loved her family. N has now accessed the REC and developed her own action plan focused on her wellbeing. N was truly inspiring and demonstrates that with the right support and belief, you can start your Recovery journey.**

*Hospital to Home Team*

# Strategic Goal:

# Influence

Local services and communities will be influenced, shaped and transformed with the collective voice of Lived Experience.

The Forum continues to be a valued strategic partner within the Dorset Health and Social Care system, working in partnership with organisations across Dorset to represent and amplify the voices and perspectives of people and communities. The Forum has been built over the past 30 years with the voices and experiences of people across Dorset. As we mature as a System partner it is important to ensure that we are representing and amplifying the voices of people and communities to actively influence local priorities and agendas.

On a national level 2024/25 has seen unprecedented changes and challenges within the NHS. This inevitably impacts people and communities; for example responses to people experiencing mental health crisis or access to treatment for people who have struggles with drugs and alcohol, or more than one diagnosis. With the current pressures, there is a danger that people with experiences of trauma and mental ill health can be blamed for pressure on NHS acute services, increasing the likelihood of discrimination and lack of support when it is needed, which then exacerbates challenges for everyone.

Through partnership, we can be courageous and embrace change, particularly different ways of working, putting people and communities at the heart of service design and delivery, sharing power, building understanding and co-creating solutions. We fundamentally believe that people and communities have the capacity to support each other and to reduce reliance on statutory services. To release this capacity, we must build understanding and the most effective way to do this is through hearing people's stories, sharing experiences and advocating for those who often do not have a voice.

This year, we have undertaken a number of community focused listening activities, in response to nationally and locally proposed changes, getting alongside people to gather their views, perspectives and ideas. These activities have enabled us to bring people's voices to the heart of service changes in Dorset, challenging stigma and perceptions, as well as exploring radical solutions for complex problems. We collected 167 individual stories from people within communities across Dorset, who would not otherwise have been able to share their views, without advocacy and support.

## Activism

During the year, we have supported activities within healthcare that highlight the harm that can occur when there is inadequate care and support. Initiatives that aim to reduce the use of restrictive practice, such as restraint and seclusion, in mental health acute settings, and to improve the culture of care, have been a key focus for teams during 2024/25. Through people's experiences we have been able to highlight the long-term effects of systemic trauma and racism and to hold space to enable coproduction around specific challenges that are difficult to discuss or to find solutions.

As well as acting as a critical friend to organisations that provide care and support for people, it has been important to enable people to access trusted information and advocacy. We have used our digital presence, through our website and social media, to raise awareness and encourage people to have their say in issues that matter to them.



Having the Forum in this space to ensure we really think about people who live with mental health challenges everyday has been important. The purpose of these changes is to try and ensure that people get the right care by the right person. Many of our staff want to do their best to help people but we don't think we have the necessary skills. It really is just about listening at the end of the day.

*Staff Member RCRP Group*

# Impact

This year, through utilising Lived Experience expertise and our collective voices, we have undertaken influencing activities across the Dorset System, to bring about change.

**58,750** hours of Lived Experience expertise.

**980** participations in system meetings.

**9,376** interactions with followers across social media.

**156** teams and Organisations receiving Training and support.

# Strategic Goal:

# Influence

Local services and communities will be influenced, shaped and transformed with the collective voice of Lived Experience.

## Parity

Challenging health inequalities has been a key focus in recent years as we have worked to ensure that people who experience mental health difficulties have equitable access to physical health care too. During 2024/25 we developed a series of films that aim to challenge perceptions on what it means to live with complex mental health challenges, or to be diagnosed with a serious mental illness (SMI). By exploring the barriers that people face when accessing support for their physical health, the films also aim to encourage and support people to value and attend to their physical health. We all have mental health and we all have physical health and there are times when we may need a bit of help and support for either.

People of colour and individuals from diverse cultural backgrounds experience inequity of access to health and social care. We acknowledge the need for us to broaden our engagement activities, to build specific understanding of the barriers that people face. During 2024/25 we have worked alongside Dorset HealthCare to support the implementation of PCREF (Patient and Carer Race Equality Framework), NHS England's first anti-racism framework.

We have also proactively expanded our networks to foster allyship, sharing and utilising our position for less listened to perspectives and voices.

## System

This year, our focus on Lived Experience Leadership has included building understanding and skills for people to develop their ability to influence. This work has enabled us to ensure that we have more people across our workforce who are able to intentionally share their Lived Experience expertise at a leadership level, alongside team leaders, operational managers, commissioners and community leaders, to bring about change.

Through the service transformation experiences of the past few years, Dorset has developed a good understanding of Coproduction and there is a commitment to work together to bring about culture change. However, we know that this can become more challenging in the midst of operational pressures and difficulties. Embedding individuals with leadership skills, in addition to their Lived Experience expertise, within services and across the system, we can provide challenge but also increased capacity for the cocreation of solutions.

This important work also creates additional progression opportunities, raising the bar for people who historically may not have considered management or leadership roles.

We believe that as the landscape of healthcare changes, it is more important than ever to see people in the context of their whole lives and their communities. During 2024/25 we have continued to use our lived and living experiences to influence closer working across healthcare and within communities, breaking down barriers that have existed since the NHS began, to shape a sustainable future together.



**This has been quite a healing conversation; it was a really difficult time, and things didn't go well for me. To know that things can be different for other people and if ever I have to go back it will be a less shaming experience, that's important.**

*Participant in Listening Project*

# Future Plans

Development of our Strategy for 2024-2029, has been an important workstream during the year, giving the organisation a clear focus and road map for the years ahead, as we work to influence change and deliver impact across our three Strategic Goals.



## Diversity and Engagement

Further developing our lived experience infrastructure and constituency networks to ensure that we are engaging and representative of different communities across Dorset. We are working intentionally to create pathways and opportunities for a diverse workforce that can represent all aspects of experience in Dorset and in our society, increasing understanding and influencing change throughout our work.

## Partnerships

Developing relationships across the Dorset System and local communities to collaborate, add value, build capacity, grow connections and influence change. We will continue to enable local communities to have an increased understanding of mental health, through Recovery Education and Coproduction.





## Income diversification

Developing different income generation and fundraising activities for longer term sustainability, independence and integrity to fulfil the Forum's Vision, Mission and charitable purpose.

## Demonstrating impact

Continuing to develop the Forum's systems and processes as part of our ongoing data and evaluation journey, to capture and communicate the impact of our work for staff, funders and the people of Dorset.



## Digital transformation

Building on considerable progress made in recent years to further embrace new ways of working and explore opportunities for developing innovation, efficiencies, quality assurance, governance, communication and engagement throughout all of the Charity's operations. This includes a commitment to celebrating difference, supporting equality of opportunity and continuous learning and development.

# Future Plans

## Financial Position

The Forum has a range of funding streams, which include contracts and grants to provide specific services, as detailed in the financial statements, as well as funding from grant making bodies to fulfil our aims and objectives. In addition to this, the Forum continues to develop its social enterprise activities. Many of our activities are currently focused within the NHS and wider integrated system, in order to bring lived experience expertise and challenge on behalf of beneficiaries to the shaping and future design of local mental health services. As with many third sector and 'not for profit' organisations, our funding streams are timebound and variable, which means continual review of our funding strategy.

Maintaining independence as an organisation is vital in our work. Our fundraising strategy for the years ahead includes increasing our independent funding sources and further developing our social enterprise activities, in response to the growing awareness of the need to understand and respond to mental health differently across all sectors, communities and systems.

The Forum continues to manage its resources in an efficient manner and is therefore able to ensure that funding is targeted on developing and improving services. We recognise the necessity of

raising funds and generating diverse income streams, in order to strengthen our service delivery and to fulfil our objectives and potential as an organisation. Achieving longer term financial sustainability is a priority for the years ahead, even more so as we see increasing financial pressures on public services, as a result of the pandemic, the cost-of-living crisis and other global factors.

The Forum has received a number of generous donations and support throughout the year from individuals, community groups and organisations, which further enable our work.

The Trustees would like to thank everyone who has contributed to the Forum's activities during the year for their support, including the Charity's workforce, volunteers, beneficiaries, funders and donors.

Income for the year decreased by £33,844 on 2023/24 and expenditure increased by £82,891. Delivery activity was maintained at similar levels during the year, with expenditure against restricted reserve funds during the year, shown in Note 15 of the Financial Statements.

The cash balance held, as per the balance sheet, includes income deferred into 2025/26 for activities that will take place during that year. In addition, reserves

are held for future activities. Ideally, income received and associated activity and expenditure occur in the same financial year. This is not always possible given the nature of charity finance, the operating environment and the Charities Statement of Recommended Practice (SORP). This results in fluctuations in the Year End outturn position, as can be seen in the Statement of Financial Activities on page 44.

Income levels have been consistent overall, but variable during the year, as shown in Notes 2 and 3 of the Financial Statements.

There was increased investment in the Recovery Education Centre in the year, additional workstreams within the Dorset Wellbeing and Recovery Partnership portfolio and new workstreams for Hampshire and Isle of Wight Healthcare NHS Foundation Trust (HIoW Healthcare) and the International Care Network (ICN). There continues to be a range of income streams that have had no inflationary increase for a number of years, making it challenging to meet and sustain increased inflationary costs.

Trustees are assured and satisfied that the organisation is a going concern for the next 12 months and has financial resilience for the foreseeable future, in spite of the complex operating environment.

	2025	2024
	£	£
<b>Income during the year was:</b>	1,455,487	1,489,331
<b>Of which related to restricted project activities:</b>	1,292,669	1,335,460
<b>Total expenditure during the year was:</b>	1,492,923	1,410,032
<b>Of which was from restricted funds:</b>	1,404,778	1,306,926
<b>Of which was from unrestricted funds:</b>	88,145	103,106
<b>Net expenditure (2025) / net income (2024) for the year:</b>	(37,436)	79,299
<b>Net income relating to unrestricted activities:</b>	74,673	50,765
<b>Net expenditure (2025) / net (2024) relating to restricted funds:</b>	(112,109)	28,534

## Fundraising Activities

The Forum does not actively undertake any direct fundraising activities and does not engage anyone to undertake such activities on its behalf.



# Financial and Management Policies

## Reserves Policy

Trustees are aware of the need to retain funding for future endeavours and developments, in order to meet the needs of the Charity's beneficiaries. Trustees review the level of reserves required on a regular basis, to ensure that they are adequate to fulfil the Charity's continuing obligations and in line with the Charity's Reserves Policy and objectives.

The Charity regularly reviews its Reserves Policy to ensure that it is achieving the appropriate balance between the need to serve beneficiaries as quickly as possible and the need to manage risks appropriately. In doing so, the Charity considers sector guidance for charities to hold reserves for the purpose of protecting the continuity of the Charity's work, providing funds needed for the development of the Charity, or providing funds needed to replace assets. It is the policy of the Charity that reserves should provide adequate financial stability and means for the Charity to meet its charitable objectives for the foreseeable future.

The Reserves Policy and the designations made within the reserves are key tools in monitoring and maintaining sufficient cash flows. The Trustees deem it necessary to have the security of reserves to maintain and develop activities with confidence, particularly where there may be timing delays with funding streams and to build resilience in the event of unforeseen difficulties. The determination of an

appropriate reserves level is a key part of the strategic planning process and is linked to risk assessment of key areas of income and expenditure, along with future strategic development.

Trustees review the allocation of the Charity's reserves and make specific designations where applicable. Restricted funds are funds required to be used for a specific purpose. Free reserves represent unrestricted funds of the Charity excluding restricted and designated funds. The Trustees aim to hold sufficient free reserves to ensure financial sustainability, operational continuity to meet the needs of beneficiaries in the event of unforeseen situations and future strategic development.

The trustees have reviewed the Reserves Policy during the year. Trustees consider it prudent to set aside an amount equivalent

to between three and twelve months of anticipated annual running costs. For the coming year, based on 2024/25 figures, this range would be between £107,655 and £430,623.

As at 31 March 2025, free reserves are within the range of the Reserves Policy.

These reserves would enable the Charity to continue to operate in the short term in the event of income shortfall and while action is being taken to replace funding or to implement required changes. Trustees continue to take active steps to increase the level of free reserves to build resilience and the longer-term sustainability and stability of the Charity.

	2025	2024
	£	£
Reserves at 31 March:	1,295,401	1,332,837
Consisting of restricted funds of:	822,346	934,455
And unrestricted funds of:	473,055	398,382
Of which are determined by the Trustees as Designated funds for specific purposes*:	70,000	63,020
Less fixed assets:	Nil	Nil
Free reserves:	403,055	335,362

## Investment Powers

The Constitution authorises the Trustees to use all money raised to further its Objects and to do all things that are lawful and conducive to the attainment of those Objects and does not prevent investment.

## Investment and Cash Management Policy

Management of cash reserves is governed by the Investment and Cash Management Policy, which establishes the Charity's investment objectives (in order of priority) as:

1. Capital preservation;
2. Liquidity; and
3. Income generation.

The Policy prohibits investment in instruments which do not guarantee principal repayment and controls credit risk, with bank counterparty limits approved by the Finance and Audit Committee.

Liquidity is ensured by specifying a minimum balance to be retained in instant access bank accounts, with a complementary limit on the average term or notice period for other deposits. Within these parameters, the Finance Team has delegated authority to manage the Charity's current and deposit accounts to maximise interest income, as far as consistent with limiting operational risk. This means that sufficient funds are available at any one time to ensure that the Charity can meet all its liabilities.

The Investment and Cash Management Policy is approved by the Board annually and monitored on a quarterly basis by the Finance and Audit Committee.

## Risk Management

The Trustees acknowledge their responsibility to give due consideration to the risks to which the Charity is exposed and have put in place processes to identify and manage risks through Risk Registers. Risks are regularly reviewed, assessed, managed and escalated appropriately in accordance with the Risk Management Policy.

The Trustees have given due consideration to the major risks to which the Charity is exposed and are satisfied that systems, processes and procedures are established in order to manage these risks. Risk management processes are in place and continue to be developed as required throughout the organisation. The Forum is committed to the continuous improvement of practices and procedures, including identifying improvements to risk management processes. These include regular review of internal control systems, which enable the Senior Leadership Team and Trustees to identify, manage and satisfactorily control risk exposures.

The Board regularly reviews organisational and strategic priorities, associated risks and mitigating factors. During the year, the Board has considered the risk of loss

of funds through situations such as cyber-crime, fraud, global banking crisis or inflation and this has been a key area of focus for the Finance and Audit Committee.

The top three risks to the charity in the year ahead are:

- Sudden and significant (20-50%) decrease in funding / loss of funds - arising from changes in priorities nationally / locally, due to change and destabilisation; or situations like counterparty default, cyber-crime, fraud, banking crisis or inflation.
- Increase in demand for Forum's activities - arising from growing acuity, ongoing uncertainty and continual change across the Dorset System.
- Unable to demonstrate successful delivery of the Strategy and the Forum's impact - due to insufficient impact data and evaluation activities, as a result of underdeveloped data and reporting mechanisms across the business.

Work to strengthen governance mechanisms has been ongoing during recent years. An established Internal Audit and Quality Improvement Plan is in place, including ongoing review of the Charity's controls and procedures and development of a range of assurance mechanisms. The two Board Committees provide scrutiny, information, assurance and recommendation for the Board, adding valuable capacity to the Charity's governance processes and activities.

# Structure, Governance and Management

## Governing Document and Constitution

Dorset Mental Health Forum is a registered Charitable Incorporated Organisation (CIO) in England and Wales, Charity number 1169215. The CIO's principal office is 29/29A Durngate Street, Dorchester, Dorset, DT1 1JP. It is governed by its Constitution which was originally adopted on 16 September 2016 when the CIO was first established. The Dorset Mental Health Forum, Charity number 1073818, transferred all assets, liabilities, activities, staff and undertakings to the new Dorset Mental Health Forum CIO on 31 March 2017.

The Forum Charity is governed by its Constitution and the Objects of the CIO are:

To promote and protect mental health for the public benefit, including but not exclusively by:

- a. Supporting the Recovery of people experiencing mental distress, by creating opportunities for people to reconnect with their own strengths and resources, in order to build the lives they wish to live.
- b. Challenging discrimination against people experiencing or affected by mental distress by modelling the value of lived experience expertise, including representation and involvement in the improvement and shaping of mental health services.

- c. Advancing the education and understanding of the general public in all areas relating to mental health by promoting the principles of mental health, Wellbeing and Recovery through Coproduction and Recovery Education.
- d. Developing the skills, capacity and opportunities to build socially inclusive, equitable and reciprocal communities which actively support good mental health.

## Public Benefit

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and Coproduction.

The Trustees have paid due regard to the Charity Commission's guidance on public benefit in deciding the activities undertaken by the Charity during the year. The Trustees are satisfied that the information provided in the Trustees' report and accounts meets the public benefit reporting requirements.

Trustees understand the difference made to the lives of the Charity's beneficiaries, as well as to society for public benefit.

The Forum's beneficial purpose and activities are as stated above. The Forum's workforce models, facilitates and provides hope, opportunity and understanding around mental health throughout all of its projects and activities. This has enormous impact for people who experience mental illness and who have direct contact with any of the Forum's workforce and operational activities, as direct beneficiaries. In addition to this direct benefit, the Forum's activities also raise awareness, challenge stigma, influence culture and change behaviour within individuals, organisations, local communities and service systems, for public benefit in Dorset and beyond.

## Recruitment and Appointment of Trustees

Appointment of Board members ("Trustees" for Charity legislation purposes) is governed by the Constitution of the Charity.

Trustees are appointed, and reappointed, by the Members of the Charity at the AGM. New Trustees may also be appointed between AGMs by the existing Trustees but must retire and be reappointed by the Members at the subsequent AGM. The Board reviews its composition and performance regularly to ensure the appropriate balance of skills, experience, backgrounds and knowledge.

The following people were Trustees of the Charity during the year:

- Ann Abraham (retired as Chair in November 2024)
- Alison Chorley
- Sorrelle Ford
- Tim Harry (new Chair from November 2024)
- Peter Lovibond
- Arthur Merchant
- Sarah Murray
- Davide Rodrigues

None of the Trustees has any beneficial interest in the Charity.

The Forum's Board of Trustees is responsible for the overall governance and strategic direction of the Charity. The Chief Executive is accountable to the Forum's Board of Trustees. During the year, all Trustee and Board activities were able to be carried out either in person or virtually, with minimal disruption to business.

### Induction and Training of Trustees

New Trustees undergo an induction period in which they become familiar with the activities of the Charity, its core values, and its governance structure and processes, with support and mentoring as required. Once appointed, new Trustees keep themselves appraised of any new guidance issued by the Charity Commission and other relevant agencies. A Governance Handbook, compiled in 2021-22 is accessible to all Trustees through a shared digital space, as part of ongoing digital transformation work.

During the year, we have continued to review and strengthen the Charity's governance structure. Trustees meet quarterly for Board meetings to discuss the business and governance of the organisation. This includes developing strategy, risk management and reviewing operational and financial information for the Charity. The Finance and Audit Committee and the Appointments and Remuneration Committee meet quarterly during the year, feeding directly into Board meetings as part of a programmed Board cycle for the year. Both Committees undertake an annual review of performance in relation to their Terms of Reference, providing assurance to the Board.

Trustees are included and encouraged to participate in whole team building events and Forum activities, as well as to undertake training and attend Recovery Education Centre courses. The Forum provides full indemnity insurance for its Trustees.

### Board Development

Development work is ongoing with the Forum Board building resilience and longer-term sustainability for the organisation. Diversity of experience and perspective and the required skill set of the Board is reviewed regularly. The Charity considers review, appraisal and development of the Board and its effectiveness, to be important processes and utilises sector resources to undertake these activities and inform performance and appropriate governance. These include the current Charity Governance Code (2020) and the related NCVO Governance Wheel Toolkit (2021), which shape regular Board

Surveys to assess effectiveness and areas of development. The Board has quarterly workshops to spend specific time on learning and development for Trustees, Board development and strategic review and planning.

Succession planning has been a key consideration during the year. In November 2024, Ann Abraham retired as Forum Chair and was succeeded by Tim Harry, following an internal recruitment process. Special thanks go to Ann for her dedication and commitment during her time as Forum Chair. With longer term succession planning in mind, Trustee recruitment activities commenced in March 2025.

### Policies

The Forum is committed to the continuous improvement of practices, policies and procedures and continues to review and update these as required and on an ongoing basis. Trustees have reviewed and continued to develop the Forum Policy Framework during the year. Key policies refreshed this year included Investment and Cash Management Policy, Health and Safety Policy Statement, Risk Management Policy and the new Anti-Fraud, Bribery and Corruption Policy. Safeguarding is intrinsic to everything that we do. This year we have strengthened our Safeguarding governance structures and updated our Safeguarding Policy and Procedures. Further review and development of policies is taking place during 2025/26.

The Charity is continuing to work with the NCVO Trusted Charity Quality Standards, with a view to seeking external assessment, once development areas are complete.

# Statement of Trustees' Responsibilities

The Trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the income and expenditure of the Charity for that period. In preparing these financial statements, the Trustees are required to:

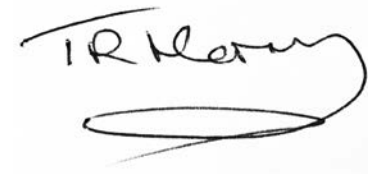
- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgments and accounting estimates that are reasonable and prudent;
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the constitution. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- There is no relevant audit information of which the Charity's auditors are unaware; and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



**Tim Harry**  
Chair

**29 July 2025**



# Independent Auditor's Report to the Trustees of Dorset Mental Health Forum

## Opinion

We have audited the financial statements of Dorset Mental Health Forum (the 'Charitable incorporated organisation') for the year ended 31 March 2025 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cashflows and notes to the financial statements, including a summary of significant accounting policies.

The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the Charity's affairs as at 31 March 2025 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- have been prepared in accordance with the requirements of the Charities Act 2011.

A C Mole LLP is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006.

## Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

## Conclusions relating to going concern

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the society's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

## Other information

The Trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

# Independent Auditor's Report to the Trustees of Dorset Mental Health Forum

## Matters on which we are required to report by exception

In light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- the information given in the trustees' report is inconsistent in any material respect with the financial statements; or
- sufficient accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records; or
- we have not received all the information and explanations we require for the purposes of our audit.

## Responsibilities of the Trustees

As explained more fully in the Trustees' responsibilities statement, the Trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

# Independent Auditor's Report to the Trustees of Dorset Mental Health Forum

## Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 144/145 of the Charities Act 2011 and report in accordance with the regulations made under section 145 of that Act.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

## Identifying and assessing potential risks of material misstatement due to irregularities

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- the legal and regulatory framework in which the Charity operates
- the nature of the sector in which the Charity operates
- the control environment and controls established to mitigate such risks
- the results of our enquiries of management about their identification and assessment of risks of irregularities
- discussions with the audit engagement team about where fraud might occur
- the incentives for fraud.

Laws and regulations which are considered to be significant to the Charity include those relating to the requirements of financial reporting framework FRS102, the Charities Act 2011, UK tax legislation, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the Charity.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

## Audit responses to risks identified

We undertook audit procedures to respond to the risks identified, and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- gaining an understanding of the Charity's procedures for ensuring compliance with laws and regulations
- testing the appropriateness of journal entries and other adjustments
- considering whether accounting estimates were indicative of potential bias
- considering whether any transactions arose outside the normal course of business
- making enquiries of management
- corroborating our enquiries through review of Board Minutes and correspondence.

# Independent Auditor's Report to the Trustees of Dorset Mental Health Forum

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditor's report.

## Use of our report

This report is made solely to the Charity's Trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

**ACMOLE LLP**

**A C Mole LLP (Statutory Auditor)  
Chartered Accountants and Statutory Auditors  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX**

**29 July 2025**

# Statement of Financial Activities

For the year ended 31 March 2025

	Notes	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
		£	£	£	£	£	£
<b>Income:</b>							
Donations and legacies	2	22,480	-	22,480	1,930	-	1,930
Charitable activities	3	103,179	1,292,669	1,395,848	116,295	1,335,460	1,451,755
Investment income		36,742	-	36,742	34,241	-	34,241
Other		417	-	417	1,405	-	1,405
<b>Total income</b>		<b>162,818</b>	<b>1,292,669</b>	<b>1,455,487</b>	<b>153,871</b>	<b>1,335,460</b>	<b>1,489,331</b>
<b>Expenditure:</b>							
Charitable activities	4	88,145	1,404,778	1,492,923	103,106	1,306,926	1,410,032
<b>Total expenditure</b>		<b>88,145</b>	<b>1,404,778</b>	<b>1,492,923</b>	<b>103,106</b>	<b>1,306,926</b>	<b>1,410,032</b>
<b>Net (expenditure)/income</b>		<b>74,673</b>	<b>(112,109)</b>	<b>(37,436)</b>	<b>50,765</b>	<b>28,534</b>	<b>79,299</b>
<b>Net movement in funds</b>		<b>74,673</b>	<b>(112,109)</b>	<b>(37,436)</b>	<b>50,765</b>	<b>28,534</b>	<b>79,299</b>
<b>Reconciliation of funds</b>							
<b>Total funds brought forward</b>		<b>398,382</b>	<b>934,455</b>	<b>1,332,837</b>	<b>347,617</b>	<b>905,921</b>	<b>1,253,538</b>
<b>Total funds carried forward</b>		<b>473,055</b>	<b>822,346</b>	<b>1,295,401</b>	<b>398,382</b>	<b>934,455</b>	<b>1,332,837</b>

# Balance Sheet

For the year ended 31 March 2025

	Notes	2025		2024	
		£	£	£	£
<b>Fixed assets</b>					
Tangible assets	9		-		-
<b>Current assets</b>					
Debtors	10		77,645		203,084
Cash at bank and in hand			1,471,418		1,332,451
			<b>1,549,063</b>		<b>1,535,535</b>
<b>Creditors</b>					
Amounts falling due within one year	11	<b>253,662</b>		<b>202,698</b>	
<b>Net current assets</b>			<b>1,295,401</b>		<b>1,332,837</b>
<b>Total assets less current liabilities</b>			<b>1,295,401</b>		<b>1,332,837</b>
<b>Net assets</b>			<b>1,295,401</b>		<b>1,332,837</b>
<b>The funds of the Charity</b>					
<b>Unrestricted funds</b>					
General funds	15		403,055		335,362
Designated funds	15		70,000		63,020
			<b>473,055</b>		<b>398,382</b>
<b>Restricted funds</b>	15		<b>822,346</b>		<b>934,455</b>
<b>Total Charity funds</b>			<b>1,295,401</b>		<b>1,332,837</b>

Approved by the Board of Trustees for issue on 29 July 2025 and signed on their behalf by:



**Tim Harry, Chair**

# Statement of Cashflows

For the year ended 31 March 2025

	Notes	2025		2024	
		£	£	£	£
<b>Cashflows from operating activities</b>					
Net cash provided by/(used in) operating activities	13		102,225		(308,401)
<b>Cashflows from investing activities</b>					
Interest from investment		<b>36,742</b>		<b>34,241</b>	
Net cash provided by investing activities			<b>36,742</b>		<b>34,241</b>
Change in cash and cash equivalents in the reporting period			138,967		(274,160)
Cash and cash equivalents at the beginning of the reporting period			1,332,451		1,606,611
<b>Cash and cash equivalents at the end of the reporting period</b>			<b>1,471,418</b>		<b>1,332,451</b>



# Notes to the Financial Statements

For the year ended 31 March 2025

## 1. Accounting Policies

### 1.1 General information

Dorset Mental Health Forum is a Charitable Incorporated Organisation governed by its Constitution.

The address of the principal office is given on page 63. The nature of the Charity's operations and its principal activities are set out in the Trustees' report on pages 3-38.

#### Basis of accounting and assessment of going concern

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes.

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (issued October 2019) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011.

The Charity meets the definition of a public benefit entity under FRS 102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

### 1.2 Income recognition

All income is included in the statement of financial activities when the Charity is entitled to the income, it is probable the income will be received and the amount can be measured reliably. The following specific policies are applied to particular categories of income.

Donations and gifts are recognised in the Statement of Financial Activities when receivable. Legacy income is recognised in the financial statements in the period that it has been received or where there is sufficient evidence that it is probable that the legacy will be received.

Income from grants and contracts, relating to charitable activities are recognised in the Statement of Financial Activities when receivable. If there is a Service Level Agreement or Contract in place income is taken into account in the period to which it relates. Where grants and contract income received have conditions or restrictions as to their use attached the income is recognised as restricted income funds. Where no such conditions or restrictions exist, grants and contract income received are recognised as unrestricted income.

Investment income in respect of funds held on deposit is included when receivable and the amount can be measured reliably. This is normally upon notification of the interest paid by the bank.

Other income is recognised in the Statement

of Financial Activities when receivable; this relates largely to the reimbursement of expenditure.

### 1.3 Donated services

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

### 1.4 Expenditure recognition

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably. All expenditure is accounted for on an accruals basis. All expenses, including support costs and governance costs, are allocated or apportioned to the applicable expenditure headings in the statement of financial activities.

Charitable expenditure comprises those costs incurred by the Charity in the delivery of its charitable activities and services. It includes both costs that can be allocated directly to such activities and costs of an indirect nature which are necessary to support them. Those support costs of an indirect nature include the resources of senior management, personnel, HR, IT, premises, finance and governance which are apportioned on a basis consistent with the use of resources largely by reference to time spent although

alternative methods of apportionment may be used where they produce a more equitable result. Details of apportionment of support costs are shown in note 5.

### 1.5 Pension costs

The Charity operates workplace pension schemes for its qualifying employees. The schemes used are the government established National Employment Savings Trust (NEST) and Standard Life Stakeholder Scheme. Both schemes are defined contribution schemes and the amount included in the Statement of Financial Activities represents the contributions payable to the scheme in respect of the accounting period.

### 1.6 Operating leases

Leases in which substantially all the risks and rewards of ownership are retained by the lessor are classified as operating leases. Rentals payable under operating leases are charged to the Statement of Financial Activities over the term of the lease. The Charity has operating leases for the premises from which it operates. The title of the leased premises remains with the lessor.

### 1.7 Fixed assets

Where fixed assets are purchased they are stated at their purchase cost plus any incidental expenses of acquisition. Where fixed assets are donated, they are stated at their estimated market value on acquisition. Depreciation is charged in respect of fixed

assets and is calculated so as to write off the cost of the assets, less any estimated residual value, over their expected useful economic useful lives as follows:

Office equipment and furniture - 25% straight line.

### 1.8 Cash and cash equivalents

Cash and cash equivalents includes cash in hand and other short term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

### 1.9 Taxation

Dorset Mental Health Forum is a registered charity and is therefore not liable to taxation to the extent that its income and gains are applicable to charitable purposes only. Value added tax is not recoverable and is therefore included in the relevant costs in the Statement of Financial Activities.

### 1.10 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Board in furtherance of general objectives of the Charity, and which have not been designated for other purposes.

Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

Restricted funds are to be used for specific purposes as laid down by the donor.

Expenditure which meets this criterion is charged to the fund, together with fair allocation of management and support costs as appropriate.

### 1.11 Financial instruments

The Charity only has financial assets and liabilities that qualify as basic financial instruments including trade and other debtors, cash and bank balances and trade and other payables. Basic financial instruments are initially recognised at transaction price and subsequently at amortised cost.

### 1.12 Critical accounting estimates and judgements

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

The Trustees are of the opinion that there are no estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

## 2. Income from donations and legacies

	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
	£	£	£	£	£	£
Donations and gifts	22,480	-	22,480	1,930	-	1,930
	<b>22,480</b>	<b>-</b>	<b>22,480</b>	<b>1,930</b>	<b>-</b>	<b>1,930</b>

### 3. Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
	£	£	£	£	£	£
<b>Advocacy</b>						
Dorset Council	-	-	-	-	11,099	11,099
Dorset Healthcare	-	-	-	-	1,261	1,261
BCP Council	-	-	-	-	16,650	16,650
<b>Lived Experience Infrastructure</b>						
Dorset HealthCare	84,259	-	84,259	84,259	-	84,259
NHS Dorset ICB	10,000	-	10,000	10,000	-	10,000
BCP Council	5,000	-	5,000	5,000	-	5,000
<b>Recovery Education Centre (REC)</b>	-	128,022	128,022	-	75,235	75,235
<b>Dorset Wellbeing and Recovery Partnership</b>						
Dorset HealthCare	-	919,652	919,652	-	907,237	907,237
DMH Carers Project Income	-	3,000	3,000	-	3,000	3,000
<b>Employment Service</b>	-	125,000	125,000	-	125,000	125,000
<b>Sports and Social Programme</b>	-	7,685	7,685	-	3,995	3,995
<b>SMI Physical Health</b>	-	3,500	3,500	-	47,800	47,800
<b>Dorset Open Door</b>	-	34,015	34,015	-	71,878	71,878
<b>Suicide Prevention</b>	-	-	-	-	27,000	27,000
<b>Health Education England</b>	-	-	-	-	45,305	45,305
<b>Social Enterprise</b>	3,920	-	3,920	17,036	-	17,036
<b>HIoW Healthcare</b>	-	49,253	49,253	-	-	-
<b>International Care Network</b>	-	7,800	7,800	-	-	-
<b>Dorset Council</b>	-	14,742	14,742	-	-	-
	<b>103,179</b>	<b>1,292,669</b>	<b>1,395,848</b>	<b>116,295</b>	<b>1,335,460</b>	<b>1,451,755</b>

## 4. Expenditure on charitable activities

	Activities undertaken directly	Support Costs	Total 2025	Activities undertaken directly	Support Costs	Total 2024
	£	£	£	£	£	£
Advocacy	-	-	-	57,941	14,284	72,225
WaRP Projects	956,125	279,628	1,235,753	671,554	216,573	888,127
WaRP Core	74,145	-	74,145	103,106	-	103,106
Sports and Social	3,773	-	3,773	1,055	-	1,055
DMH Carers Project	2,716	-	2,716	-	-	-
NHS Dorset ICB	111,522	30,704	142,226	243,130	76,455	319,585
Charity Development	8,000	-	8,000	-	-	-
Digital Development	6,000	-	6,000	-	-	-
Talbot Village Trust	-	-	-	19,387	5,996	25,383
Health Education England	-	-	-	551	-	551
Dorset Council	7,015	-	7,015	-	-	-
HIoW Healthcare	4,744	751	5,495	-	-	-
International Care Network	6,084	1,716	7,800	-	-	-
	<b>1,180,124</b>	<b>312,799</b>	<b>1,492,923</b>	<b>1,096,724</b>	<b>313,308</b>	<b>1,410,032</b>

## 5. Analysis of support costs

	Community Connection	WaRP Projects	HIoW Healthcare	NHS Dorset ICB	Total 2025
	£	£	£	£	£
<b>Central Services</b>					
HR	233	39,977	107	4,183	44,500
Finance	315	52,035	145	5,648	58,143
IT	312	51,455	139	5,583	57,489
CEO	312	51,501	139	5,593	57,545
Director of Operations	97	16,586	39	1,739	18,461
<b>Premises &amp; Office</b>	57	9,677	23	1,013	10,770
<b>Governance &amp; Strategic Costs</b>	184	23,318	75	3,274	26,851
<b>PR &amp; Marketing</b>	72	12,179	24	1,274	13,549
<b>Business Manager</b>	134	22,900	60	2,397	25,491
	<b>1,716</b>	<b>279,628</b>	<b>751</b>	<b>30,704</b>	<b>312,799</b>

Support costs have been apportioned based on actual delivery hours.

## 6. Auditor's remuneration

	2025	2024
	£	£
Audit fee	7,554	7,194
Accountancy fees	5,712	5,010
Payroll services	3,227	5,233
Other services	-	202
	<b>16,493</b>	<b>17,639</b>

## 7. Trustees expenses and remuneration

No remuneration has been paid to or on behalf of the Trustees (2024: Nil).

No trustee (2024: One) had expenses reimbursed during the year of £Nil (2024: £148).

## 8. Employees and employment costs

	2025	2024
	£	£
<b>Wages and salaries</b>	1,064,123	1,013,609
<b>Social security costs</b>	73,575	68,584
<b>Pension costs</b>	40,411	36,225
	<b>1,178,109</b>	<b>1,118,418</b>

No employees were paid over £60,000 (2024: none).

The average monthly headcount (number of staff employed) during the year was:

	2025	2024
	People	People
<b>Number of Staff</b>	68	72

The full time equivalent number of staff employed on 31 March was:

	2025	2024
	People	People
<b>Full time equivalent number of staff</b>	34	35

The key management personnel of the Charity are considered to be the Chief Executive Officer, Director of Operations. The total employee benefits for key management personnel were £125,683 (2024: £122,641).

The Charity operates defined contribution pension schemes. The pension cost charged to the Statement of Financial Activities for the period represents contributions payable by the Charity to the schemes and amounted to £40,411 (2024: £36,225).

Volunteers contribute unpaid time to the services provided by the Charity. The estimated volunteer time for the period amounted to approximately 2,520 hours (2024: 3,520 hours), totalling an estimated £45,360 (2024: £63,360), which has not been reflected in the Statement of Financial Activities in accordance with the Charities SORP (FRS 102).

## 9. Tangible fixed assets

	Office Equipment & Furniture	Total
	£	£
<b>Cost</b>		
As at 01.04.24 and 31.03.25	6,032	6,032
<b>Depreciation</b>		
As at 01.04.24 and 31.03.25	6,032	6,032
<b>Net book value</b>		
As at 31.03.24 and 31.03.25	-	-

## 10. Debtors

	2025	2024
	£	£
Debtors	73,744	199,444
Prepayments	3,901	3,640
	<b>77,645</b>	<b>203,084</b>

## 11. Creditors: Amounts falling due within one year

	2025	2024
	£	£
Creditors	14,752	1,671
Accruals and deferred income	219,026	179,523
Other tax and social security	18,040	19,941
Other creditors	1,844	1,563
	<b>253,662</b>	<b>202,698</b>

## 12. Related party transactions

There were no related party transactions during the year. (2024: None).

Remuneration paid to key management personnel is disclosed in note 8.

## 13. Reconciliation of net (expenditure)/ income to net cashflow from operating activities

	2025	2024
	£	£
<b>Net (expenditure) / income for the period as per the Statement of Financial Activities</b>	(37,436)	79,299
Adjustments for:		
Depreciation charges	-	749
Decrease / (Increase) in debtors	125,439	(180,203)
Increase / (Decrease) in creditors	50,964	(174,005)
Interest from investments	(36,742)	(34,241)
<b>Net cash generated by / (used in) from operating activities</b>	<b>102,225</b>	<b>(308,401)</b>

## 14. Operating lease

Dorset Mental Health Forum is due to pay the following future minimum lease payments under non-cancellable operating leases for which it is the lessee, for each of the following periods:

	2025	2024
	£	£
<b>Payments</b>		
Within one year	1,181	1,181
Due in two to five years	295	1,475
	<b>1,476</b>	<b>2,656</b>

## 15. Statement of funds

	Balance 01.04.24	Income	Expenditure	Transfer	Balance 31.03.25
	£	£	£	£	£
<b>Unrestricted funds</b>					
General funds	335,362	162,818	(74,145)	(20,980)	403,055
<b>Designated funds</b>					
Charity development	25,000	-	(8,000)	13,000	30,000
Digital development	15,000	-	-	-	15,000
Evaluation activities	23,020	-	(6,000)	7,980	25,000
<b>Total Unrestricted funds</b>	<b>398,382</b>	<b>162,818</b>	<b>(88,145)</b>	<b>-</b>	<b>473,055</b>
<b>Restricted funds</b>					
Advocacy	29,028	-	-	-	29,028
Employment	39,775	-	-	-	39,775
Community Development	64,630	-	-	-	64,630
WaRP	639,210	1,206,689	(1,235,753)	-	610,146
DMH Carers Project	10,389	3,000	(2,716)	-	10,673
Sports and Social	6,266	7,685	(3,773)	-	10,178
HIoW Healthcare	-	49,253	(5,495)	-	43,758
NHS Dorset ICB	145,157	3,500	(142,226)	-	6,431
International Care Network	-	7,800	(7,800)	-	-
Dorset Council	-	14,742	(7,015)	-	7,727
<b>Total Restricted funds</b>	<b>934,455</b>	<b>1,292,669</b>	<b>(1,404,778)</b>	<b>-</b>	<b>822,346</b>
<b>Total funds</b>	<b>1,332,837</b>	<b>1,455,487</b>	<b>(1,492,923)</b>	<b>-</b>	<b>1,295,401</b>

## 15. Statement of funds (continued)

### Restricted Funds

- Advocacy funds held to provide advocacy related activities for people and communities in Dorset.
- Employment funds held to provide employment related activities to individuals and local employers in Dorset.
- Community development funds (previously named Social Inclusion) held for projects to be started in the future.
- The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised partnership between Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust which puts Lived Experience expertise at the heart of service design and delivery, to transform services and affect culture change. Funding supported around 25 different partnership projects and workstreams during the year. The Recovery Education Centre (REC), Dorset Work Matters, the Discovery Project and the Retreats were some of these projects.
- Funds received and administered for the independent Dorset Mental Health Carers Project, supported by the Dorset Mental Health Forum.
- Sports and Social funds included Active Dorset funding for gym membership for ex-offenders, Dorset Council funding for activities for asylum seekers and Sport England funding for Project Climbing group as part of the Forum's Sports and Social Programme.
- Hampshire & Isle of Wight NHS Foundation Trust (Hlo W NHS Trust) funds received for support and coaching around development of a Lived Experience Infrastructure.
- NHS Dorset ICB funds held for delivery of workstreams including mental health support in Primary Care, SMI Physical Health Checks, Neurodiversity and Dorset Open Door.
- International Care Network (ICN) funds received to develop capacity around wellbeing support and Recovery Education.
- Dorset Council funds received for coproduction of local delivery of Oliver McGowan training.

### Designated Funds

- Designated Charity development funds held for the specific purpose of meeting expenditure directly related to the development of the Charity. Expenditure at the end of 2024/25 and into 2025/26 relates to costs for ongoing Trustee recruitment process.
- Designated Digital development funds held for the specific purpose of meeting expenditure directly related to digital transformation work within the Charity.
- Designated Evaluation activities funds held for the specific purpose of meeting expenditure directly related to evaluation activities within the Charity. Some Evaluation activities have taken place during 2024/25 and more are planned for 2025/26.

## 16. Analysis of net assets between funds

	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
	£	£	£	£	£	£
Tangible fixed assets	-	-	-	-	-	-
Current assets	520,508	1,028,555	1,549,063	434,576	1,100,959	1,535,535
Creditors due within one year	(47,453)	(206,209)	(253,662)	(36,194)	(166,504)	(202,698)
	<b>473,055</b>	<b>822,346</b>	<b>1,295,401</b>	<b>398,382</b>	<b>934,455</b>	<b>1,332,837</b>

## 17. Statement of funds for the year ended 31 March 2024

	01.04.23	Income	Expenditure	Transfer	31.03.24
	£	£	£	£	£
<b>Unrestricted funds</b>					
General funds	284,597	153,871	(103,106)	-	335,362
<b>Designated funds</b>					
Charity Development	25,000	-	-	-	25,000
Digital Development	15,000	-	-	-	15,000
Evaluation activities	23,020	-	-	-	23,020
<b>Total unrestricted funds</b>	<b>347,617</b>	<b>153,871</b>	<b>(103,106)</b>	<b>-</b>	<b>398,382</b>
<b>Restricted funds</b>					
Advocacy	72,244	29,010	(72,226)	-	29,028
Employment	39,775	-	-	-	39,775
Community Development	64,630	-	-	-	64,630
WaRP	660,127	822,455	(888,126)	44,754	639,210
Sports and Social	3,326	3,995	(1,055)	-	6,266
Talbot Village Trust	25,383	-	(25,383)	-	-
NHS Dorset ICB	33,047	431,695	(319,585)	-	145,157
DMH Carers Project	7,389	3,000	-	-	10,389
Health Education England	-	45,305	(551)	(44,754)	-
<b>Total restricted funds</b>	<b>905,921</b>	<b>1,335,460</b>	<b>(1,306,926)</b>	<b>-</b>	<b>934,455</b>
<b>Total funds</b>	<b>1,253,538</b>	<b>1,489,331</b>	<b>(1,410,032)</b>	<b>-</b>	<b>1,332,837</b>

# Reference and Administrative Details

## Trustees

Ann Abraham (retired Chair)  
Alison Chorley  
Sorrelle Ford  
Tim Harry (new Chair)  
Peter Lovibond  
Arthur Merchant  
Sarah Murray  
Davide Rodrigues

## Chief Executive

Becky Aldridge

## Principal Office

Dorset Mental Health Forum  
29/29A Durngate Street  
Dorchester  
Dorset  
DT1 1JP

## Senior Statutory Auditor

Adam Knight FCA  
A C Mole LLP  
Chartered Accountants and Statutory Auditors  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX

## Bankers

National Westminster Bank Plc  
Dorchester Branch  
49 South Street  
Dorchester  
Dorset  
DT1 1DW



**The collective voice of lived experience**

29A Durngate Street, Dorchester, Dorset DT1 1JP

01305 257172

[www.dorsetmentalhealthforum.org.uk](http://www.dorsetmentalhealthforum.org.uk)

**DORSET MENTAL HEALTH FORUM**

England & Wales - Charity number 1169215

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# Accounts

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## **Reference and Administrative Details**

# Welcome from our Chair & CEO

**The Trustees have pleasure in presenting their Annual Report and the financial statements for the year ended 31 March 2024. The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Constitution and the Charities Act 2011.**

We introduce our Annual Report for 2023/24 by first thanking and celebrating our inspirational workforce, who bring their own life and lived experience every day to their work as they model Recovery and influence people's understanding of mental health. We could not have achieved such impact for people in Dorset this year without the dedication, commitment and continued hard work of our whole workforce.

The last year has been one of challenge, change and transformation. It continues to be a difficult time for people and communities throughout Dorset, with increased pressure on mental health and social care services in Dorset.

During 2023/24 we are very proud to have responded positively to the ongoing challenges and continual change around us, evolving and structuring our work and activities to meet and support people on their own terms, educating and enabling people, services and systems to celebrate and build on what is strong, in order to meet the challenges of today and those of the future.

This year has seen a strong focus on collaboration and integration throughout mental health services and across the Dorset System. This has included a commitment to embedding partnership working with the broader voluntary and community sector within local mental health services moving forward. We have been delighted to bring our expertise and support to this significant and important transformation work, facilitating coproduction and ensuring that people's voices and perspectives are heard and integrated throughout the shaping and design of future services. By supporting people and local organisations to share their voices, we have continued to build capacity within services and communities. In July 2023 we were delighted to be able to hold our previously postponed Festival, marking the Forum's 30th anniversary.

Looking ahead into 2024/25, we are excited to begin our new Strategy period, building on developments and achievements in recent years and guided by the needs of beneficiaries and stakeholders. We believe that our work will be even more relevant and vital in the years ahead and we remain deeply committed to and passionate about driving social and cultural change within services and communities across Dorset.



**Ann Abraham**  
Chair of the Trustee Board



**Becky Aldridge**  
CEO



During 2023/24 we increased understanding of mental health, supported people's Recovery and influenced change across services and communities in Dorset.

*“ The Peer Specialist understood that I need a little help to stay at work; they shared some of their own experiences and it made me feel less broken and more normal.*”

# Our Impact

We workforce delivered

**57,211** hours

of Lived Experience expertise, modelling Recovery, inspiring hope, increasing understanding and supporting people to build the lives they wish to live.

Our workforce provided

**12,493**

Recovery focused interactions with people, supporting them to have a voice, agency and control in building their lives.

We provided Recovery Education directly to

**3,928** people

across services and communities, with many more people accessing Recovery Education digitally.

We welcomed

**890**

**new students**

to the Recovery Education Centre during the year.

We brought Lived Experience leadership and representation to

**68**

decision making boards, steering groups, project groups and system meetings, attending over

**600**

meetings throughout the year.

We collaborated with

**226**

community organisations across Dorset during the year, influencing local service offers to be shaped by people's voices and experiences.

# Strategic Report

## About Us

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and coproduction.

We believe that experiencing mental ill health and managing one's symptoms, should not preclude or diminish a person's right to enjoy all of the opportunities that life can provide, as with managing any physical health condition. This is one of the aspirations that sits behind all our work, along with a passionate desire to challenge the stigma, prejudice and discrimination that still exists around people's experiences of mental health problems.

We have contact with many people who do not want to be defined by their illness or diagnosis, despite managing serious long-term conditions. Many people can lead meaningful and satisfying lives, others require more support to do so, often having been supported by services for most of their lives.

Recovery is at the heart of all that we do, enabling and promoting the value and efficacy of people doing for themselves what they have traditionally been reliant on services to provide, encouraging an environment where people work in partnership with providers of care and treatment, in order to build the lives they wish to live.

**“ Recovery is not about ‘getting rid’ of problems. It is about seeing people beyond their problems - their abilities, possibilities, interests and dreams - and recovering the social roles and relationships that give life value and meaning.**

*Repper and Perkins, 2003*



## Our Vision

A world that understands mental health: where individuals and communities can enjoy good mental health, shared humanity and appropriate support when they experience emotional distress and trauma.

## Our Mission

To increase understanding of mental health, to support people's Recovery and to build capacity within services and communities to bring about change.

We deliver our Mission through four **Strategic Aims:**

- Increase understanding of mental health through Recovery Education and Coproduction.
- Support and enable people to live the lives they wish to live.
- Develop capacity and build connected communities across Dorset.
- Influence and transform local services with collective voice of lived experience expertise.

## Our Values

Guide everything that we do:

- **Honesty** is our foundation stone.
- Our work requires **Courage**, to be vulnerable and to grow.
- We know the power of **Compassion**.
- **Respect** for who we are is a human right.
- Having **Integrity** means living our values and staying true to our purpose.

## Our Beliefs

We believe:

- That people with lived experience of mental health problems have a wealth of specialist knowledge, valuable expertise and experiences.
- In the effectiveness of partnership working in the design and provision of services.
- That everyone has an equal right to enjoy all the opportunities that life provides.
- That there is 'no health without mental health' and that 'mental health is everyone's business'.
- That individuals and communities hold many of their own solutions.
- That hope, mental health and wellbeing are essential to us all.

# Activities and Objectives

## What we do

We are a community of people who have experiences of mental distress and managing a mental health condition, experiences of trauma, living with long term health issues or caring for someone who is in emotional distress. Our lived experience infrastructure brings the collective voice of lived experience expertise to the heart of real and sustainable change across Dorset.

Utilising our lived experience expertise, we influence and facilitate significant culture change around mental health in Dorset, as well as undertake a range of specialist independent and partnership activities to fulfil our mission and objectives, supporting individuals, communities and local systems to understand mental health. Intrinsic to this work is modelling Recovery, developing capacity and capability within individuals and communities.

### Social Connection

Our Connection Programme works with individuals and organisations to offer different activities across Dorset, developing connections and helping people to build a life within their local community.

### Advocacy

Our Dorset Mental Health Advocacy Service supports people to have a voice and exercise their rights in matters that directly affect their lives. This includes times when they may be subject to the Mental Health Act.

### Dorset Wellbeing and Recovery Partnership (WaRP)

The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised, formal partnership between the Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust, putting lived experience expertise hand in hand with professional and technical expertise. The Partnership promotes coproduction and drives culture change across the Integrated Care System in Dorset.

Together the Dorset Wellbeing and Recovery Partnership provides the following projects:

## **Dorset Recovery Education Centre**

Dorset Recovery Education Centre (REC) provides Recovery focused, educational opportunities that enable people to identify their strengths, find hope and build skills, to reframe their experiences of trauma and emotional distress.

## **Discovery Project**

Discovery Project works closely with schools and youth projects to facilitate participation and create mechanisms for young people to have a voice within local services and their communities.

## **Dorset Open Door**

Dorset Open Door is a collaborative, multiagency bereavement support and signposting service for people in Dorset who have been bereaved by trauma or suicide.

## **Retreats**

Retreats provide a collaborative approach to crisis support in Dorset, through open access safe spaces for people to make sense of their distress in times of self-defined crisis.

## **Peer Specialists**

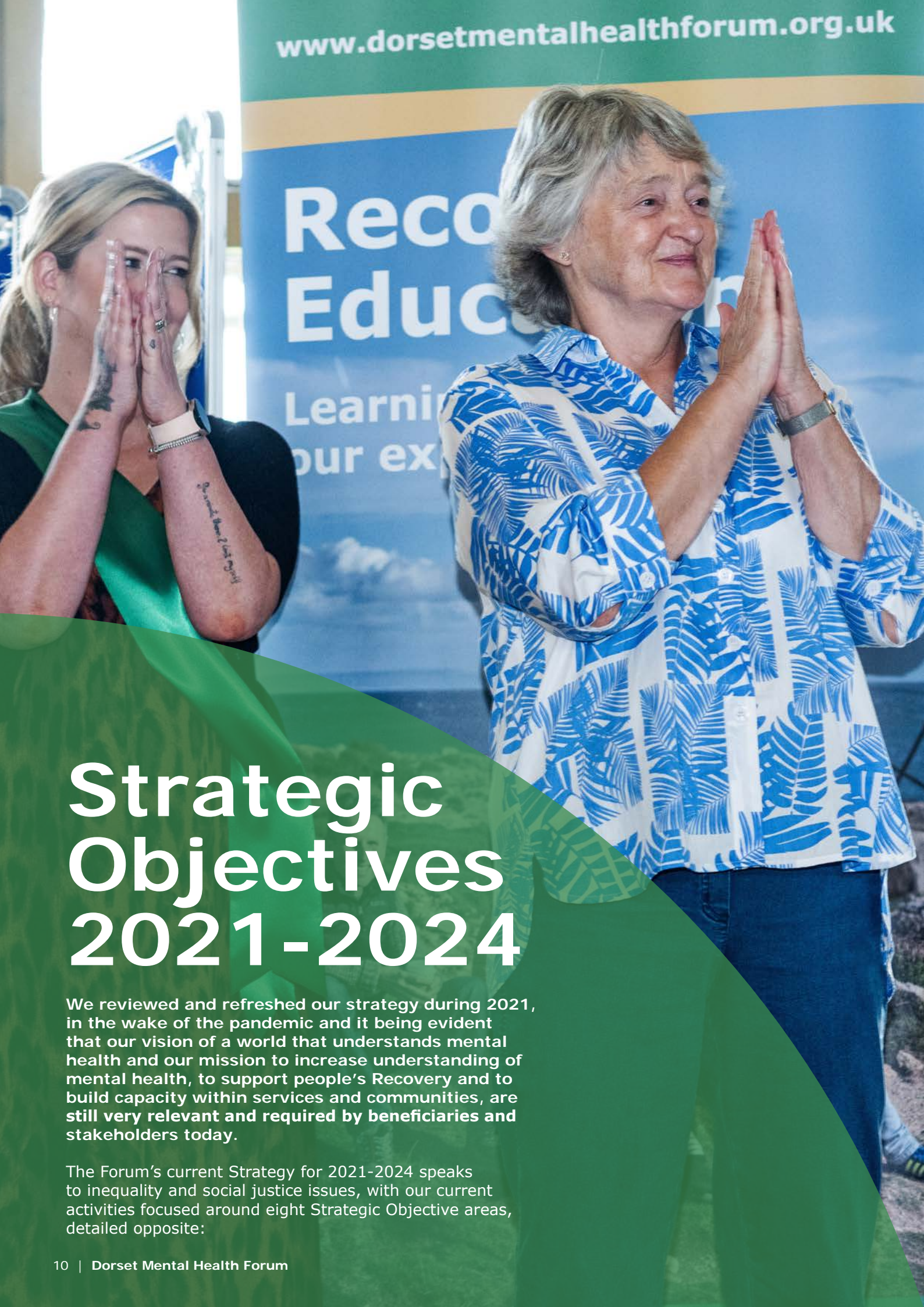
Peer Specialists within services are staff who intentionally utilise their lived experience of mental health issues, trauma, and emotional distress, to support Recovery oriented practices within local services and broader communities across Dorset.

## **Carers Project**

Carers Project supports the development of lived experience voices of carers, particularly people who have been bereaved by suicide or cared for people who have experienced complex trauma.

## **Dorset Work Matters**

Dorset Work Matters provides an Individual Placement and Support (IPS) employment service to people accessing secondary Mental Health services, as part of a broader ambition to create meaningful vocational opportunities for people in Dorset.



# Strategic Objectives 2021-2024

We reviewed and refreshed our strategy during 2021, in the wake of the pandemic and it being evident that our vision of a world that understands mental health and our mission to increase understanding of mental health, to support people's Recovery and to build capacity within services and communities, are **still very relevant and required by beneficiaries and stakeholders today.**

The Forum's current Strategy for 2021-2024 speaks to inequality and social justice issues, with our current activities focused around eight Strategic Objective areas, detailed opposite:

1

## Education

Broaden reach of Recovery Education, including Primary Care Networks, Department for Education, Public Health, building literacy around impact of trauma.

2

## Agency

Enable people to build their lives beyond services, through community activities, citizenship, learning and Recovery.

3

## Activism

Develop channels for grassroots activism, to enable people's voices to be heard, advocating for equality and social justice.

4

## System

Further develop WaRP as Dorset ICS system partner, supporting delivery of Prevention at Scale and Population Health agendas.

5

## Parity

Promote parity between physical and mental health, challenging health inequalities, through lived experience perspective.

6

## Connection

Develop diverse access and alternative options for people to understand and reframe their life and mental health experiences.

7

## Collaboration

Develop reciprocal collaborations within local communities to build capacity, add value and amplify people's voices.

8

## Employment

Pioneer development of peer employment pathways and opportunities across the Dorset System, building understanding and capability.

We are working within our Strategic Aims during 2021-2024 to make a difference for the people of Dorset, within these eight Strategic Objective areas.

Three supporting strategies enable and support delivery of our Strategy for 2021-2024:

- **People Strategy** – Continuous learning, growth and development for our thriving workforce.
- **Sustainability Strategy** – Developing longer term financial and environmental sustainability.
- **Influencing Strategy** – Building our collective voice for influence and to bring about change.

# Achievements and Performance during 2023/24

## Lived Experience Workforce

**Our diverse lived experience infrastructure brings an alternative perspective around mental health to local services and communities, challenging stigma through lived experience expertise and coproduction. We continue to evolve and strengthen our lived experience infrastructure, creating opportunities and mechanisms for people to make sense of and reframe their experiences, utilising their learning to model Recovery, increase understanding, give hope and support to others and influence change in Dorset.**

Our courageous and inspiring workforce promote and model the principles of Wellbeing and Recovery in various roles and settings throughout the organisation, local services and across Dorset. Our staff are employed in many different roles, utilising their lived experience and technical expertise. Employment is an intrinsic part of our people's own Recovery journeys, as they discover and develop skills and resilience to build the lives they wish to live, focusing on their strengths, rather than deficits, "what's strong, rather than what's wrong".

Maintaining a psychologically safe, values-based workplace and culture throughout our organisation is paramount for our work. Many of our workforce have experienced periods of crisis and trauma in their lives. Our people demonstrate courage, tenacity, and compassion within their work and in support of their colleagues every day. Developing capacity, resilience, and sustainability across the organisation to support the workforce and to fulfil our purpose and objectives as a charity continues to be our priority.

We have developed pathways and more opportunities for people to contribute to the Forum's work, created a better experience for people exploring peer work and promoted a more diverse selection of job roles offering supported and substantive employment.

We have also developed more opportunities for career progression for staff. Some people have grown and been promoted within the organisation; others have benefitted from understanding more about their transferable skills and moved on from the Forum to develop diverse careers in different sectors across Dorset.

There continues to be significant transformation across the Dorset System, including ongoing review of health and social care workforce requirements. During recent years, the Forum

has been able to contribute to System wide workforce planning, including demonstrating the value and importance of a Lived Experience infrastructure, promoting different ways of working and bringing about culture change across Dorset. There is growing appetite across Dorset to create opportunities and space for people to bring their lived experienced perspectives to a range of new and emerging roles.

Gaining understanding and learning from the experiences of our staff and our beneficiaries is core to everything that we do. During this year we have continued to grow our workforce and through ongoing feedback and engagement with our staff, gain further understanding of how best to support people's emotional health in the workplace. This enables us to articulate to other employers and organisations, the fundamentals required to support the mental health and wellbeing of all staff in the workplace.

The Forum continues to grow its collective voice. During the year we have increased our focus on community engagement, developing responsive, local opportunities for people to contribute their voices and perspectives, to local change. We understand the importance of reciprocity and contribution within people's personal Recovery journeys and that sharing your story is an individual process that takes courage and at times, support.

Reaching out and creating opportunities for people who may not have previously felt able or confident to contribute their experiences is particularly important as new services are mobilised and changes to the way people can access support when they experience distress is evolving. Through different engagement activities, beneficiaries are sharing the things that matter most to them, within their lives and communities. This underpins and shapes the Forum's activities within the Dorset System.



DORSET  
MENTAL HEALTH  
FORUM  
Primary

www.dorsethealthforum.org.uk

Voice Lived

**//** The Forum uniquely evolves to meet the needs of its beneficiaries. We listen even in difficult circumstances. There is a culture of accountability that has influenced me as a person, at work and in my personal life.

*Staff Member*

**With 75 people  
in our workforce  
we delivered  
57,211 hours  
of Lived Experience  
expertise across Dorset.**

# Strategic Objective: Education

## Broaden reach of Recovery Education, including Primary Care Networks, Department for Education, Public Health, building literacy around impact of trauma.

Recovery Education sits at the heart of all of the work that the Forum undertakes. In the new landscape of integrated community services, it has been important that people experiencing trauma, emotional distress and mental and physical health challenges have a safe place to learn together.

Recovery Education enables people to explore what matters to them and to begin to understand how to build a life beyond their experiences. Further to this, we see that truly collaborative care is only possible when people themselves have their own knowledge and perspective to bring to the conversation and planning, alongside professionals.

We also know that framing distress solely through a diagnostic or medical lens can bring about harm to individuals and has the potential to further distance people from the life that they wish to live. We hear from many of our students that the Recovery Education Centre (REC) enables them to reframe their experiences, identify their strengths and create new pathways in their own Recovery journey.

During 2023/24 we have further developed our Trauma Informed courses, acknowledging that people who have experienced trauma in their lives are often excluded from traditional mental health support. There is still a lot of stigma and prejudice around for people who have diagnoses of 'Personality disorders'. This year we have developed a new course: Understanding 'Personality Disorder' Diagnosis and Complex Trauma. This course aims to create a safe space for individuals to make sense of their experiences of Complex Trauma and touches on societal perceptions of the 'Personality Disorder' label. In Spring of 2024 the Recovery Education Centre celebrated reaching 10,000 registered students. We continue to evolve our existing courses, responding to feedback from students and the needs of individuals across a broad range of conditions and experiences, always bringing in fresh Lived Experience perspectives to courses such as Understanding Unusual Experiences.

The Recovery Education Centre has increased collaboration across Dorset during the year, working closely with small communities and grassroots organisations to develop bespoke opportunities and a more localised offer.

This has led to the development of a new course and online resources focused on Community and Belonging. The REC Team is working closely with the Forum Social Connection teams to offer activities after Recovery Education that support people to build a life beyond their experiences, that has meaning, value and purpose for them.

There has been a significant increase in delivery of training to Mental Health professionals during the year. Building understanding and literacy around trauma is essential in bringing about long-term culture change and improving services for people with experiences of Complex Trauma.

- We offered **2,320** places on Recovery Education Centre courses. These were delivered in a range of different ways, including face to face courses, webinars and enhanced webinars, enabling students to create a Recovery Education pathway that works for them.
- We delivered Trauma Informed training to **678** professionals across the Mental Health system, building understanding and literacy around Trauma across over **80** different teams.
- We offered **886** Individual Learning Plan appointments. These single sessions provide an opportunity for individuals to identify their own strengths and aspirations, creating an important and supported learning activity in itself. We have seen a large increase in people seeking 1-1 signposting, advice and guidance during these sessions this year.



**// It was also the first time I had come across the word 'lived experience' in terms of those leading the session. I thought this was great, especially how it was highlighted. This created a safe space and encouraged others to share.**

*Mental Health Professional*

## Impact

In 2023/24 the Recovery Education Centre, has continued to provide a unique opportunity for people to build understanding and literacy around Recovery, develop agency within their lives and lend their experiences to social change and service transformation across Dorset. Recovery Education underpins all of the work that we do across projects, services and activities and this year we have been intentional about celebrating difference and developing understanding from a Trauma Informed perspective.

# Strategic Objective:

# Agency

**Enable people to build their lives beyond services, through community activities, citizenship, learning and Recovery.**

This year we have worked collaboratively with people and communities to remove barriers and support easier access to community resources, based on a person's individual interests and values. We have provided advocacy and support in ways that are tailored and accessible to a broad range of people.

During our work in 2023/24, we have seen the value of peer support at transition points in people's lives. Meeting someone who has had similar experiences, enables people to see what might be possible for them in their lives, helping to raise expectations and increase confidence. For many of the people that we work with, isolation and loneliness are the greatest barrier to their Recovery. When people feel that they are different and their experiences have left them ostracised, it can be difficult for them to develop agency and to build a sense of community and connection with others.

We have continued to offer opportunities for people to develop social connection through leisure and sport-based activities this year, as well as intentionally walked alongside people to link them into assets and opportunities that already exist within their communities.

We have worked with people on their own terms, supporting them to live the life that they wish to live, to build community networks and to plan a future that is determined by their own hopes and aspirations, rather than determined and limited by their mental health challenges and their past experiences of trauma.

We have created space for reciprocity and contribution, to enable people to have a voice in the services that are designed to support them, promoting collaborative approaches to care planning and providing a space for people to learn more about what Recovery might mean for them.

We continue to utilise our Lived Experience expertise to model Recovery and challenge inequalities, enabling people to build lives that they wish to live, without fear, shame and prejudice.

- We ran **1,140** groups across the community, offering football sessions, bereavement support, walks, social groups, gym sessions and board game sessions as well as ad hoc activities, such as football tournaments, cinema sessions and day trips.
- We provided **3,046** Recovery focused one-to-one sessions, focused on building a life and providing opportunities for people to identify what was important to them.
- We worked with **40** individuals at the point of leaving hospital, providing peer support and facilitating warm handover to community resources.

**"When asked to see if I could help D, the psychiatrist initially was unsure if anyone would be able to connect with him, as all previous contact with the CMHT staff had failed. I was uneasy at first, but I know that lived experience can break down boundaries and enable conversations to happen. After the meeting, it was fed back that "D spoke for a good 45 minutes - I had more from him today than I've heard in five years. It was so unbelievably helpful to have a Peer there and for the Peer to share their experiences. This enabled D to talk more about his recent period of being unwell. It's a significant breakthrough for D".**

*Peer Specialist*



**“ Thankyou for being able to express how psychosis feels to live with, I was inspired by your story, and it made me feel hopeful, seeing how positive you have become.**

*1-1 Client Community Services*

## **Impact**

People tell us that meeting someone who has had a similar experience can encourage them to believe that change is possible and that the life they wish to live could be attainable. This is particularly the case for individuals subject to the Mental Health Act, who have lost their liberty and any sense of control in their life and often believe that Recovery is not possible for them. During 2023/24 we have increased our Lived Experience capacity across community teams, enabling us to walk alongside people as they explore their own strengths and values, building confidence and hope for the future.

# Strategic Objective:

# Activism

**Develop channels for grassroots activism, to enable people's voices to be heard, advocating for equality and social justice.**

When the way that services are offered changes, people and communities can be left behind. Whilst the proposed changes to services seek to make things better, they are often not communicated in a way that enables them to be accessible to those who are most disenfranchised and mistrusting.

During 2023/24, there has been an increase in the number of displaced people living in Dorset. These include people who are currently in the UK Asylum System, subjected to complex and protracted processes, which render people who have experienced significant trauma in their lives powerless and with little control over their lives and future.

Many people within the Criminal Justice System have had similar experiences and due to their status as a criminal or offender, their voices are often not heard. There is also a further population in Dorset of people who have nowhere to consider home and are excluded within communities through unstable housing, street homelessness and / or addiction.

This year, we have intentionally reached into these communities, to listen to people and approach support from a shared humanity perspective, ensuring that whatever people's circumstances, they are heard, their experiences validated and their voices amplified.

During the year, we have been able to advocate on behalf of these communities, ensuring that the unique challenges that people are facing are considered in the ongoing review, design and delivery of mental health support across Dorset.

- We provided advocacy, advice and guidance for **154** individuals within the UK Asylum System, the Criminal Justice System and experiencing insecure housing, supporting them to understand their rights and to be heard.
- We gathered the stories and perspectives of **148** individuals, enabling them to be heard and to contribute their experiences to shaping the way that local services are designed and delivered.
- We significantly increased our reach across our social media channels with **276,788** digital impressions increasing awareness, raising aspirations and advocating for people.

**"A was signposted to us from another charity that supports people seeking asylum. He was staying with other young men in a local hotel. Five of them came along to the football session and whilst they didn't speak a great deal of English, the universal language of football meant we connected on the pitch. We are now working in partnership with other charities to develop more opportunities for sport and social connection."**

*Social Inclusion Coordinator*



**//** This has been a really healing conversation, sharing my story is difficult but I feel like it can help others to have a better experience, that's important.

*1-1 Client*

## Impact

We know that reciprocity and giving something back is an important part of people's Recovery. The Forum has a **position of influence and collective voice** across Dorset. Developing mechanisms for people to contribute their experiences and stories enables them to have a voice and contribute something of meaning to others, as well as **amplifies a broader range of experiences.**

# Strategic Objective: System

**Further develop WaRP as Dorset ICS System partner, supporting delivery of Prevention at Scale and Population Health agendas.**

**During 2023/24, there have been significant changes to the way that Mental Health services are commissioned and delivered across Dorset, through the Mental Health Integrated Community Care (MHICC) Transformation. This workstream is evolving from coproduction to codelivery in a new landscape, with more organisations supporting people's mental health and wellbeing in communities.**

The Forum's valued position within the Dorset System is to ensure that the voices of people and communities are at the heart of Mental Health service provision. This requires that we must get alongside organisations who have different ways of working, acknowledging their expertise and building relationships that enable the Forum to fulfill its function and role as a critical friend.


During the year, we have brought to life people's experiences and stories, enabling operational planning and design to be based on real barriers and challenges that people face. This includes ensuring that individuals who have more complex experiences are considered universally alongside other people, in terms of access to community-based support, rather than exclusively for specialist provision.

In 2023/24, we have supported the Transformation of services for children and young people across Dorset, acknowledging that the current service model is not meeting the needs of the younger population. It has been important to ensure that we are amplifying the perspectives of young people and their families, to bring about better understanding of what matters most to young people and their families, as defined by them.

- We brought Lived Experience leadership to **28** decision making boards, project groups and steering groups; with further Lived Experience representation at over **40** operational meetings. We attended over **600** meetings in the year, ensuring that people who access services and communities were represented in decisions about local service shaping, design and delivery.
- We interacted with **794** young people and their families, listening to their voices and identifying themes to inform the Transformation and support the design of improved service provision.
- We had direct contact with **78** organisations across the Dorset System, amplifying voices, building literacy and developing understanding of the value and significance of Lived Experience expertise.

**"I wanted to write to acknowledge the vast array of work and progress that has happened this year with the Transformation program. We have all played significant parts in a very large and complex programme which has seen the NHS and voluntary sector come together like never before."**

*NHS Commissioner*



**//** I just want to say thank you to R for coming along to our planning session today, he was so articulate in explaining how his autism affects him and made us think about the environment in a way we hadn't done before. I hope he is happy to continue to be involved.

*NHS Staff Member*

## Impact

We understand that our position within the Mental Health system has been hard won, through the courage and deep commitment of many people who have shared their stories and experiences to bring about change. This privileged position, comes with great responsibility. This year, we have been committed to challenging perceptions of people who have experienced significant trauma and emotional distress, by ensuring Lived Experience representation in as many spaces, developments and conversations as possible across Dorset.

# Strategic Objective:

# Parity

**Promote parity between physical and mental health, challenging health inequalities, through lived experience perspective.**

As human beings, our physical, emotional and mental health are inextricably connected. Any trauma, life event or period of being unwell can impact our Recovery. During 2023/24, as Mental Health and Community services and acute hospitals have begun working together to provide better care for people who access their services, we have been able to embed Lived Experience perspectives through staff learning and development and peer support.

Understanding the experiences of people accessing care in acute hospitals and the impact on their mental health and wellbeing, has been a focus during the year. We have spent time gathering stories and perspectives that will help us to understand what matters to people in these settings, to support services to work in a more Recovery orientated, holistic and integrated way.

There has been a significant increase in the number of people experiencing mental health issues alongside their autism, ADHD and other neurodivergent experiences. This can cause additional barriers for people to get the support that they need in a way that works for them.

We have employed people this year to intentionally utilise their neurodivergent experiences to shape environments and break down barriers to accessing support.

- We developed **6** new Recovery Education courses and a range of resources focused on neurodivergence, pain management and the impact of loss. Delivered through courses, digital resources and workbooks, these resources provide opportunities for people to explore and learn in their own way.
- We delivered **72** sessions within acute hospital environments, promoting Recovery and developing awareness of Trauma Informed principles.
- We provided perspectives on environments and training to **220** staff and clinicians working principally with neurodivergent individuals. This has enabled us to promote Lived Experience perspectives and equipped people to have different conversations with clients and patients.

**“Having a place on the course among peers was pivotal for me. It was the first time in over eight years that I joined a group without feeling like I couldn’t survive. I was so close to abandoning my place. I’m glad I stayed. People in the room were supportive and wonderfully accommodating. I felt accepted. It was fun and I enjoyed taking part each week, even when I encountered difficulties. It was lovely being around other autistic people. One of my favorite quotes was this: “I’m having a conversation with someone [but] they’re not having the same conversation back.” It beautifully captured the social disconnect a lot of us seem to encounter.”**

*REC Student*



“ As doctors, we see people when they are really unwell; having a Peer Specialist as part of our training gives a really inspiring account of Recovery. Thank you to R and colleagues for your continued support.

*Clinician*

## Impact

The Forum employs over 50 people to intentionally utilise their Lived Experience in their role and day to day work. Our staff's unique and diverse experiences enable us to demonstrate that Recovery is not linear and is multi layered. Being human, by its nature, involves encountering different challenges throughout our lives, whether or not we are managing a mental health condition. This year we have challenged the perception that mental health issues exist in silo, working within the Dorset System to expose health inequalities and to begin to cocreate ways that these can be addressed.

# Strategic Objective:

# Connection

**Develop diverse access and alternative options for people to understand and reframe their life and mental health experiences.**

**2023/24 has been an extremely challenging year for some individuals within communities in Dorset. Whilst service changes are in motion and improvements to the way people are supported at times of distress are being planned and developed, people's current reality is still difficult.**

Stretched services, changes to support systems like benefits and ongoing cost-of-living pressures, all detrimentally impact people's mental health. People experiencing emotional distress and mental health issues are often marginalised as they struggle to articulate what they need and they are not able to access support from structures that are inflexible or inaccessible.

It is at these times that connection becomes essential. When people know that they are not alone and someone walks alongside them for a while, they are able to make sense of their experiences and to start to identify what matters most to them, as they begin to build a life beyond their point of crisis.

- We supported **199** people who experienced traumatic bereavement to find appropriate support, linking with other organisations, offering practical and peer support and enabling them to make sense of their grief.
- We worked with **46** individuals, referred from the Criminal Justice System or charities supporting migrants, helping them to identify what was important for their future, what wellbeing meant for them and to build social connection within their local communities.
- We sat alongside people in **8,724** incidences of crisis, creating space where people were not alone, supporting them in the prevention of further distress.

**"H was referred to us by Probation Services. As a medium risk offender and someone seeking asylum, his options for rehabilitation were limited and it was hoped we could get alongside him to support his wellbeing and introduce him to activities to lower the risk of reoffending. H was very isolated and frequently felt very low, so his main aim was to find healthy things to do to get out of his flat and get around positive people.**

**We started by supporting H to attend a local free weekly boxing group near his flat. Before long he was comfortable enough to go alone and he started to build relationships with other attendees. Alongside this, H had previously played football and we were able to support him to reconnect with this through attending our AFC Bournemouth football sessions."**

*Sports and Social Coordinator*



// We have had contact from a number of people who have experienced multiple complex bereavements. People tell us that it can be difficult to process this much grief and it impacts across all areas of their life including work and relationships. People often feel very alone.

We offer guidance, but most importantly a listening ear.

*Dorset Open Door Staff Member*

## Impact

When people are struggling with their mental health, accessing help and support can be difficult, particularly if there are additional layers of complexity. Individuals can feel hopeless and alone. During 2023/24 we have increased our focus on working with people who, due to their life experiences and backgrounds, find themselves marginalised and stigmatised. Approaching our work with a sense of shared humanity, has enabled us to reach further into communities and support individuals to build connection in their lives.

# Strategic Objective:

# Collaboration

**Develop reciprocal collaborations within local communities to build capacity, add value and amplify people's voices.**

The Forum has a wealth of expertise amplifying and representing the voices of people who experience mental health issues, trauma and emotional distress. We also understand the value of intentional use of Lived Experience expertise when walking alongside people in distress.

Being representative requires that we collaborate with individuals and organisations that have specialist expertise in areas such as asylum and migration, race inequality, bereavement and loss, older people and dementia, Criminal Justice, learning disabilities and autism.

During 2023/24, we have been able to develop and grow new partnerships and joint working. This has enabled us to better engage and support communities within Dorset, as we have increased our own understanding and awareness across areas where we have less experience and knowledge.

Reciprocal collaboration within communities reduces gaps in provision and enables Recovery pathways for people who do not simply fit into one diagnostic box or social model.

- We supported **138** individuals in partnership with other community organisations, creating enhanced, holistic support that acknowledged the person in the context of their life.
- We collaborated with **226** non statutory organisations to enable improved support for individuals, enabling them to build a life they wished to live, beyond services.
- We created **8** new coproduction groups focused on challenging health inequalities and bringing together multiple stakeholders to take work forward.

**“We spent a lovely morning visiting different organisations within Boscombe to gain a greater understanding of some of the community offers available in the area. We visited the Well Café and met a local group that supports vulnerable women. Being part of the Boscombe Regeneration project has helped us gain a clearer understanding of what is planned and the benefits for the local community.”**

*REC Recovery Coordinator*

**“I have developed positive working relationships with staff and people who access the service. I have had positive feedback and feel like we are having a positive impact on those we work with”.**

*Peer Specialist*



// I wanted to say thank you so much for all the work you have put into co-creating this session with us. It brought it to life through the Lived Experience Peers. We feel more confident asking our service users about how they are doing, and I hope we do much more work together in the future.

*Manager VCSE Organisation*

## Impact

Supporting people in line with our values, means that working collaboratively is no longer an aspiration, but an essential part of our work in the current environment. Very few of our interactions with people are undertaken in isolation. To support people to build meaningful lives, we have to be directed by them. This requires us to act as a bridge, connecting people in their communities, building capacity and networks.

# Strategic Objective:

# Employment

**Pioneer development of peer employment pathways and opportunities across the Dorset System, building understanding and capability.**

**During this year, we have seen a significant increase in the number of people looking to reframe their experiences by utilising their Lived Experience to support others. Further developing our processes to support staff in the workplace, determining reasonable adjustments and reducing the effects of vicarious trauma, are all areas that we have worked on during 2023/24. This knowledge and understanding has enabled us to offer expertise and support to other organisations, ensuring that many more people with their own experiences have access to work and appropriate support and guidance within the workplace.**

The number of people under the care of secondary Mental Health services supported into work during the year through the Dorset Work Matters service has increased. We have ensured that individuals who are struggling to retain their employment, have had access to support for themselves and for their employers. This work continues to break down barriers to employment for people and challenges stigma and prejudice in the workplace.

We continue to develop vocational pathways and opportunities for people to reframe and intentionally utilise their experiences within the context of work. Through Recovery Education, Social Connection and our Young Peoples' projects, we have developed induction, training and supervision structures that enable people to build confidence and work experience, and to identify career aspirations for the future.

We have supported staff to progress their careers across the Partnership, developed new leadership roles and raised work aspirations for people with experiences of mental health issues and trauma. We have promoted Recovery to employers, advocated for individuals in distress and challenged perceptions of what is possible for people and communities.

- Dorset Work Matters received **697** referrals from Community Mental Health Teams (CMHTs) and supported **262** people to achieve a positive work outcome. This represents a 50% increase on the previous year.
- We worked alongside **106** individuals that were struggling to maintain their work. This resulted in **29** people staying in employment and **38** people supported to leave their employment well.
- We received **88** new enquires for people exploring employment in peer work and recruited **17** new members of staff, signposting others to alternative activities.

**"I had been unemployed for 8 months and found it difficult to get through that when you don't feel that you have anything to do. It feels like you don't have much purpose and things drag on and I was feeling tired all of the time. Some people think that not doing anything is the life, but it really isn't! I didn't have any chances to go out and meet people and no reasons to go out. I was getting more depressed over time, having suffered with depression in the past. I felt lost, overwhelmed and didn't know what direction to turn. Meetings with my Employment Specialist made me feel hopeful. I had some social interaction and started feeling that someone else cared and wanted to support me. That support helped to push me the extra mile and it worked as I found a job quite quickly."**

*Dorset Work Matters Client*



**//** I have never worked for an organisation which has been so values based and driven. My values fit in perfectly with the Forum's values which means I am for the first time in my life able to completely be my authentic self and that is so important to me and my wellbeing and job satisfaction.

*Peer Specialist*

## Impact

The workforce of the future is changing, creating significant opportunities for people. During 2023/24 we have continued to champion intentional use of lived experience in the context of work, created more opportunities for people to join our workforce and embedded vocational pathways that focus on the development of transferable skills.



# Future Plans

Development of our Strategy for 2024-2029, has been an important workstream during the year, giving the organisation a clear focus and road map for the years ahead, as we work to influence change and deliver impact across three Strategic Goals:

**Increasing understanding of mental health and the impact of trauma through Recovery Education and Coproduction.**

**Enabling people to have agency and be supported to live the lives they wish to live beyond services and within their communities.**

**Influencing, shaping and transforming local services and communities with the collective voice of Lived Experience.**

## Diversity

Further developing our lived experience infrastructure and constituency networks to ensure that we are engaging and representative of different communities across Dorset. We are working intentionally to create pathways and provide opportunities for a more diverse workforce that can represent all aspects of experience in our society, increasing understanding and influencing change throughout our work.

## Partnerships

Developing relationships across the Dorset System and local communities to collaborate, add value, build capacity, grow connections and influence change. We will continue to enable local communities to have an increased understanding of mental health, through Recovery Education and Coproduction.

## Income diversification

Developing different income generation and fundraising activities for longer term sustainability, independence and integrity to fulfil the Forum's Vision, Mission and charitable purpose.

## Demonstrating impact

Continuing to develop the Forum's systems and processes as part of our ongoing data journey, to capture and communicate the impact of our work for beneficiaries, staff, funders and the wider public.

## Digital transformation

Building on considerable progress made in recent years to further embrace new ways of working and explore opportunities for developing innovation, efficiencies, quality assurance, governance, communication and engagement throughout all of the Charity's operations. This includes a commitment to celebrating difference, supporting equality of opportunity and continuous learning and development.

# Financial Review

## Financial Position

The Forum has a range of funding streams, which include contracts and grants to provide specific services, as detailed in the financial statements, as well as funding from grant making bodies to fulfil our aims and objectives. In addition to this, the Forum continues to develop its social enterprise activities. Many of our activities are currently focused within the NHS and wider integrated system, in order to bring lived experience expertise and challenge on behalf of beneficiaries to the shaping and future design of local mental health services. As with many third sector and 'Not for Profit' organisations, our funding streams are timebound and variable, which means continual review of our funding strategy.

Maintaining independence as an organisation is vital in our work. Our fundraising strategy for the years ahead includes increasing our independent funding sources and further developing our social enterprise activities, in response to the growing awareness of the need to understand and respond to mental health differently across all sectors, communities and systems.

The Forum continues to manage its resources in an efficient manner and is therefore able to ensure that funding is targeted on developing and improving services. We recognise the necessity of raising funds and generating diverse income streams, in order to strengthen our service delivery and to fulfil our objectives and potential as an organisation.

Achieving longer term financial sustainability is a priority for the years ahead, even more so as we see increasing financial pressures on public services, as a result of the pandemic, the cost-of-living crisis and other global factors.

The Forum has received a number of generous donations and support throughout the year from individuals, legacies, community groups and organisations, which enable our work further.

The Trustees would like to thank everyone who has contributed to the Forum's activities during the year for their support, including the Charity's workforce, volunteers, beneficiaries, funders and donors.

	2024	2023
	£	£
Income during the year was:	1,489,331	1,433,108
Of which related to restricted project activities:	1,335,460	1,310,117
Total expenditure during the year was:	1,410,032	1,444,809
Of which was from restricted funds:	1,306,926	1,371,046
Of which was from unrestricted funds:	103,106	73,763
Net income (2024) / net expenditure (2023) for the year:	79,299	(11,701)
Net income relating to unrestricted activities:	50,765	49,228
Net income (2024) / net expenditure (2023) relating to restricted funds:	28,534	(60,929)

Income for the year was increased by £56,223 on 2022/23 and expenditure was down by £34,777. Delivery activity was maintained at similar levels during the year, with some expenditure against restricted reserve funds during the year, shown in Note 15 of the Financial Statements.

The cash balance held, as per the balance sheet, includes income deferred into 2024/25 for activities that will take place during that year. In addition, reserves are held for future activities. Ideally, income received and associated activity and expenditure occur in the same financial year. This is not always possible given the nature of charity finance, the operating environment and SORP guidelines. This results in fluctuations in the Year End outturn position, as can be seen in the Statement of Financial Activities on page 43.

Income levels have been consistent overall, but variable during the year, as shown in Note 3 of the Financial Statements.

Our longstanding Advocacy contract came to an end during the first quarter. There was increased investment in the Recovery Education Centre in the year, additional workstreams within the Dorset Wellbeing and Recovery

Partnership portfolio and further funding for Serious Mental Illness (SMI) Physical Health workstreams.

There are a range of income streams that have had no inflationary increase for a number of years, making it challenging to meet increased inflationary costs.

Trustees are assured and satisfied that the organisation is a going concern for the next 12 months and has financial resilience for the foreseeable future, in spite of the complex operating environment.

## Fundraising Activities

The Forum does not actively undertake any direct fundraising activities and does not engage anyone to undertake such activities on its behalf.



# Financial and Management Policies

## Reserves Policy

Trustees are aware of the need to retain funding for future endeavours and developments, in order to meet the needs of the Charity's beneficiaries. Trustees review the level of reserves required on a regular basis, to ensure that they are adequate to fulfil the Charity's continuing obligations and in line with the Charity's Reserves Policy and objectives.

The Charity regularly reviews its Reserves Policy to ensure that it is achieving the appropriate balance between the need to serve beneficiaries as quickly as possible and the need to manage risks appropriately. In doing so, the Charity considers sector guidance for charities to hold reserves for the purpose of protecting the continuity of the Charity's work, providing funds needed for the development of the Charity, or providing funds needed to replace assets. It is the policy of the Charity that reserves should provide adequate financial stability and means for the Charity to meet its charitable objectives for the foreseeable future.

The Reserves Policy and the designations made within the reserves are key tools in monitoring and maintaining sufficient cash flows. The Trustees deem it necessary to have the security of reserves to maintain and develop activities

with confidence, particularly where there may be timing delays with funding streams and to build resilience in the event of unforeseen difficulties. The determination of an appropriate reserves level is a key part of the strategic planning process and is linked to risk assessment of key areas of income and expenditure, along with future strategic development.

Trustees review the allocation of the Charity's reserves and make specific designations where applicable. Restricted funds are funds required to be used for a specific purpose. Free reserves represent unrestricted funds of the Charity excluding restricted and designated funds. The Trustees aim to hold sufficient free reserves to ensure financial sustainability, operational continuity to meet the needs of beneficiaries in the event of unforeseen situations and future strategic development.

The Trustees have reviewed the Reserves Policy during the year. Trustees consider it prudent to set aside an amount equivalent to between three and twelve months of anticipated annual running costs. For the coming year, based on 2023/24 figures, this range would be between £109,208 and £436,834.

	2024	2023
	£	£
<b>Reserves at 31 March 2024:</b>	1,332,837	1,253,538
<b>Consisting of restricted funds of:</b>	934,455	905,921
<b>And unrestricted funds of:</b>	398,382	347,617
<b>Of which are determined by the Trustees as Designated funds for specific purposes*:</b>	63,020	63,020
<b>Less fixed assets:</b>	Nil	749
<b>Free reserves:</b>	335,362	283,848

\* Expenditure anticipated to occur during 2023/24 will happen during 2024/25.

As at 31 March 2024, free reserves are within the range of the Reserves Policy.

These reserves would enable the Charity to continue to operate in the short term in the event of income shortfall and while action is being taken to replace funding or to implement required changes. Trustees continue to take active steps to increase the level of free reserves to build resilience and the longer-term sustainability and stability of the Charity.

## Investment Powers

The Constitution authorises the Trustees to use all money raised to further its Objects and to do all things that are lawful and conducive to the attainment of those Objects and does not prevent investment.

## Cash Management and Investment Policy

Management of cash reserves is governed by the Cash Management and Investment Policy, which establishes the Charity's investment objectives (in order of priority) as:

- (1) Capital preservation;
- (2) Liquidity; and
- (3) Income generation.

The Policy prohibits investment in instruments which do not guarantee principal repayment and controls credit risk, with bank counterparty limits approved by the Finance and Audit Committee.

Liquidity is ensured by specifying a minimum balance to be retained in instant access bank accounts, with a complementary limit on the average term or notice period for other deposits. Within these parameters, the Finance Team has delegated authority to manage the Charity's current and deposit accounts to maximise interest income, as far as consistent with limiting operational risk. This means that sufficient funds are available at any one time to ensure that the Charity can meet all its liabilities.

The Cash Management and Investment Policy is approved by the Board annually and monitored on a quarterly basis by the Finance and Audit Committee.

## Risk Management

The Trustees acknowledge their responsibility to give due consideration to the risks to which the Charity is exposed and have put in place processes to identify and manage risks through Risk Registers. Risks are regularly reviewed, assessed, managed and escalated appropriately in accordance with the Risk Management Policy.

The Trustees have given due consideration to the major risks to which the Charity is exposed and are satisfied that systems, processes and procedures are established in order to manage these risks. Risk management processes are in place and continue to be developed as required throughout the organisation. The Forum is committed to the continuous improvement of practices and procedures, including identifying improvements to risk management processes. These include regular review of internal control systems, which enable the Senior Leadership Team and Trustees to identify, manage and satisfactorily control risk exposures.

The Board regularly reviews organisational and strategic priorities, associated risks and mitigating factors. During the year, the Board has considered the risk of loss of funds through situations such as cyber-crime, fraud, global banking crisis or inflation and this has been a key area of focus for the Finance and Audit Committee.

The top three risks to the charity in the year ahead are:

- Existing cost of living pressures for beneficiaries, including the Forum workforce, leading to rise in demand and additional pressure on the charity's resources.
- Continual change and financial pressures within the health and social care system, resulting in increased level of risk within the Forum's operating environment.
- Structural and cultural change within the Dorset Integrated Care System, leading to complexity in the Forum's strategic and operational context.

Work to strengthen governance mechanisms has been ongoing during recent years. An established Internal Audit and Quality Improvement Plan is in place, including ongoing review of the Charity's controls and procedures and development of a range of assurance mechanisms. The two Board Committees provide scrutiny, information, assurance and recommendation for the Board, adding valuable capacity to the Charity's governance processes and activities.

# Structure, Governance and Management

## Governing Document and Constitution

Dorset Mental Health Forum is a registered Charitable Incorporated Organisation (CIO) in England and Wales, Charity number 1169215. The CIO's principal office is 29/29A Durngate Street, Dorchester, Dorset, DT1 1JP. It is governed by its Constitution which was originally adopted on 16 September 2016 when the CIO was first established. The Dorset Mental Health Forum, Charity number 1073818, transferred all assets, liabilities, activities, staff and undertakings to the new Dorset Mental Health Forum CIO on 31st March 2017.

The Forum Charity is governed by its Constitution and the Objects of the CIO are:

To promote and protect mental health for the public benefit, including but not exclusively by:

- a. Supporting the Recovery of people experiencing mental distress, by creating opportunities for people to reconnect with their own strengths and resources, in order to build the lives they wish to live.
- b) Challenging discrimination against people experiencing or affected by mental distress by modelling the value of lived experience expertise, including representation and involvement in the improvement and shaping of mental health services.
- c) Advancing the education and understanding of the general public in all areas relating to mental health by promoting the principles of mental health, Wellbeing and Recovery through Coproduction and Recovery Education.
- d) Developing the skills, capacity and opportunities to build socially inclusive, equitable and reciprocal communities which actively support good mental health.

## Public Benefit

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and Coproduction.

The Trustees have paid due regard to the Charity Commission's guidance on public benefit in deciding the activities undertaken by the Charity during the year. The Trustees are satisfied that the information provided in the Trustees' report and accounts meets the public benefit reporting requirements.

Trustees understand the difference made to the lives of the Charity's beneficiaries, as well as to society for public benefit. The Forum's beneficial purpose and activities are as stated above. The Forum's workforce models, facilitates and provides hope, opportunity and understanding around mental health throughout all of its projects and activities. This has enormous impact for people who experience mental illness and who have direct contact with any of the Forum's workforce and operational activities, as direct beneficiaries. In addition to this direct benefit, the Forum's activities also raise awareness, challenge stigma, influence culture and change behaviour within individuals, organisations, local communities and service systems, for public benefit in Dorset and beyond.

## Recruitment and Appointment of Trustees

Appointment of Board members (“Trustees” for Charity legislation purposes) is governed by the Constitution of the Charity.

Trustees are appointed, and reappointed, by the Members of the Charity at the AGM. New Trustees may also be appointed between AGMs by the existing Trustees but must retire and be reappointed by the Members at the subsequent AGM. The Board reviews its composition and performance regularly to ensure the appropriate balance of skills, experience, backgrounds and knowledge.

We undertook Trustee Recruitment activities during the year and are delighted to welcome new Trustees. The following people were Trustees of the Charity during the year:

- Ann Abraham (Chair)
- Chris Balfe (Retired December 2023)
- Alison Chorley
- Sorrelle Ford
- Tim Harry
- Peter Lovibond
- Arthur Merchant
- Sarah Murray
- Davide Rodrigues

None of the Trustees has any beneficial interest in the Charity.

The Forum’s Board of Trustees is responsible for the overall governance and strategic direction of the Charity. The Chief Executive is accountable to the Forum’s Board of Trustees. During the year, all Trustee and Board activities were able to be carried out either in person or virtually, with minimal disruption to business.

## Induction and Training of Trustees

New Trustees undergo an induction period in which they become familiar with the activities of the Charity, its core values, and its governance structure and processes, with support and mentoring as required. Once appointed, new Trustees keep themselves apprised of any new guidance issued by the Charity Commission and other relevant agencies. A Governance Handbook, compiled in 2021-22 is accessible to all Trustees through a shared digital space, as part of ongoing digital transformation work.

During the year, we have continued to review and strengthen the Charity’s governance structure. Trustees meet quarterly for Board meetings to discuss the business and governance of the organisation. This includes developing strategy, risk management and reviewing operational and financial information for the Charity. The Finance and Audit Committee and the Appointments and Remuneration Committee meet quarterly during the year, feeding directly into Board meetings as part of a programmed Board cycle for the year. Both Committees undertake an annual review of performance in relation to their Terms of Reference, providing assurance to the Board.

Trustees are included and encouraged to participate in whole team building events and Forum activities, as well as to undertake training and attend Recovery Education Centre courses. The Forum provides full indemnity insurance for its Trustees.

# Structure, Governance and Management

## Board Development

Development work is ongoing with the Forum Board building resilience and longer-term sustainability for the organisation. Diversity of experience and perspective and the required skill set of the Board is reviewed regularly. The Charity considers review, appraisal and development of the Board and its effectiveness, to be important processes and utilises sector resources to undertake these activities and inform performance and appropriate governance.

These include the current Charity Governance Code (2020) and the related NCVO Governance Wheel Toolkit (2021), which shape regular Board Surveys to assess effectiveness and areas of development.

The Board has quarterly workshops to spend specific time on learning and development for Trustees, Board development and strategic review and planning.

## Policies

The Forum is committed to the continuous improvement of practices, policies and procedures and continues to review and update these as required and on an ongoing basis. Trustees have reviewed and continued to develop the Forum Policy Framework during the year. Key policies refreshed this year included Investment and Cash Management, Health and Safety Policy Statement and the new Remuneration and Reward Policy. Further review and development of policies will be taking place during 2024/25.

The Charity is continuing to work through the NCVO Trusted Charity Quality Standards, with a view to seeking external assessment.



### Our 30 year journey



# Statement of Trustees' Responsibilities

**The Trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).**

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the income and expenditure of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgments and accounting estimates that are reasonable and prudent;
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the constitution. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- There is no relevant audit information of which the Charity's auditors are unaware;
- and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



**Ann Abraham**  
Chair

**30 July 2024**

# Independent Auditor's Report

## to the Trustees of Dorset Mental Health Forum

### Opinion

We have audited the financial statements of Dorset Mental Health Forum (the 'Charitable incorporated organisation') for the year ended 31 March 2024 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cashflows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the Charity's affairs as at 31 March 2024 and of its income and expenditure for the year then ended;
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- Have been prepared in accordance with the requirements of the Charities Act 2011.

A C Mole LLP is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006.

### Basis of opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

### Conclusions relating to going concern

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the society's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

### Other information

The Trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

# Independent Auditor's Report

## to the Trustees of Dorset Mental Health Forum

### Matters on which we are required to report by exception

In light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- The information given in the trustees' report is inconsistent in any material respect with the financial statements; or
- Sufficient accounting records have not been kept; or
- The financial statements are not in agreement with the accounting records; or
- We have not received all the information and explanations we require for the purposes of our audit.

### Responsibilities of the Trustees

As explained more fully in the Trustees' responsibilities statement, the Trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

### Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 144/145 of the Charities Act 2011 and report in accordance with the regulations made under section 145 of that Act.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed on the next page.

# Independent Auditor's Report

## to the Trustees of Dorset Mental Health Forum

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- The legal and regulatory framework in which the Charity operates
- The nature of the sector in which the Charity operates
- The control environment and controls established to mitigate such risks
- The results of our enquiries of management about their identification and assessment of risks of irregularities
- Discussions with the audit engagement team about where fraud might occur
- The incentives for fraud.

Laws and regulations which are considered to be significant to the Charity include those relating to the requirements of financial reporting framework FRS102, the Charities Act 2011, UK tax legislation, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the Charity.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

## Audit responses to risks identified

We undertook audit procedures to respond to the risks identified, and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- Gaining an understanding of the Charity's procedures for ensuring compliance with laws and regulations
- Testing the appropriateness of journal entries and other adjustments

- Considering whether accounting estimates were indicative of potential bias
- Considering whether any transactions arose outside the normal course of business
- Making enquiries of management
- Corroborating our enquiries through review of Board Minutes and correspondence.

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditor's report.

## Use of our report

This report is made solely to the Charity's Trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

**ACMOLE LLP**

**A C Mole LLP (Statutory Auditor)  
Chartered Accountants and Statutory  
Auditors  
Stafford House  
Blackbrook Park Avenue  
Taunton, Somerset TA1 2PX**

**30 July 2024**

# Statement of Financial Activities

For the year ended 31 March 2024

	Notes	Unrestricted Funds £	Restricted Funds £	Total Funds 2024 £	Unrestricted Funds £	Restricted Funds £	Total Funds 2023 £
<b>Income:</b>							
Donations and legacies	2	1,930	-	1,930	8,087	-	8,087
Charitable activities	3	116,295	1,335,460	1,451,755	101,134	1,310,117	1,411,251
Investment income		34,241	-	34,241	12,534	-	12,534
Other		1,405	-	1,405	1,236	-	1,236
<b>Total income</b>		<b>153,871</b>	<b>1,335,460</b>	<b>1,489,331</b>	<b>122,991</b>	<b>1,310,117</b>	<b>1,433,108</b>
<b>Expenditure</b>							
Charitable activities	4	103,106	1,306,926	1,410,032	73,763	1,371,046	1,444,809
<b>Total expenditure</b>		<b>103,106</b>	<b>1,306,926</b>	<b>1,410,032</b>	<b>73,763</b>	<b>1,371,046</b>	<b>1,444,809</b>
<b>Net (expenditure)/ income before transfers</b>		<b>50,765</b>	<b>28,534</b>	<b>79,299</b>	<b>49,228</b>	<b>(60,929)</b>	<b>(11,701)</b>
<b>Net movement in funds</b>		<b>50,765</b>	<b>28,534</b>	<b>79,299</b>	<b>49,228</b>	<b>(60,929)</b>	<b>(11,701)</b>
<b>Reconciliation of funds</b>							
<b>Total funds brought forward</b>		<b>347,617</b>	<b>905,921</b>	<b>1,253,538</b>	<b>298,389</b>	<b>966,850</b>	<b>1,265,239</b>
<b>Total funds carried forward</b>		<b>398,382</b>	<b>934,455</b>	<b>1,332,837</b>	<b>347,617</b>	<b>905,921</b>	<b>1,253,538</b>

# Balance Sheet

As at 31 March 2024

	Notes	£	2024 £	£	2023 £
<b>Fixed assets</b>					
Tangible assets	9		-		749
<b>Current assets</b>					
Debtors	10		203,084		22,881
Cash at bank and in hand			1,332,451		1,606,611
			<b>1,535,535</b>		<b>1,629,492</b>
<b>Creditors</b>					
Amounts falling due within one year	11	<b>202,698</b>		<b>376,703</b>	
<b>Net current assets</b>					
			<b>1,332,837</b>		<b>1,252,789</b>
<b>Total assets less current liabilities</b>					
			<b>1,332,837</b>		<b>1,253,538</b>
<b>Net assets</b>					
			<b>1,332,837</b>		<b>1,253,538</b>
<b>The funds of the Charity</b>					
<b>Unrestricted funds</b>					
General funds	15		335,362		284,597
Designated funds	15		63,020		63,020
			<b>398,382</b>		<b>347,617</b>
<b>Restricted funds</b>					
	15		<b>934,455</b>		<b>905,921</b>
<b>Total Charity funds</b>					
			<b>1,332,837</b>		<b>1,253,538</b>

Approved by the Board of Trustees for issue on 30 July 2024 and signed on their behalf by:



**Ann Abraham**  
Chair

# Statement of Cashflows

For the year ended 31 March 2024

	Notes	2024 £	2023 £
<b>Cashflows from operating activities</b>			
Net cash (used in)/provided by operating activities	13	(308,401)	288,831
<b>Cashflows from investing activities</b>			
Interest from investment		34,241	12,534
Net cash provided by investing activities		34,241	12,534
Change in cash and cash equivalents in the reporting period		(274,160)	301,365
Cash and cash equivalents at the beginning of the reporting period		1,606,611	1,305,246
<b>Cash and cash equivalents at the end of the reporting period</b>		<b>1,332,451</b>	<b>1,606,611</b>

# Notes to the Financial Statements

For the year ended 31 March 2024

## 1. Accounting Policies

### 1.1 General information

Dorset Mental Health Forum is a Charitable Incorporated Organisation governed by its Constitution.

The address of the principal office is given on pages 36 and 57. The nature of the Charity's operations and its principal activities are set out in the Trustees' report on pages 3 – 39.

### Basis of accounting and assessment of going concern

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (issued October 2019) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102) and the Charities Act 2011.

The Charity meets the definition of a public benefit entity under FRS 102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

### 1.2 Income recognition

All income is included in the statement of financial activities when the Charity is entitled to the income, it is probable the income will be received and the amount can be measured reliably. The following specific policies are applied to particular categories of income.

Donations and gifts are recognised in the Statement of Financial Activities when receivable. Legacy income is recognised in the financial statements in the period that it has been received or where there is sufficient evidence that it is probable that the legacy will be received.

Income from grants and contracts, relating to charitable activities are recognised in the Statement of Financial Activities when receivable. If there is a Service Level Agreement or Contract in place income is taken into account in the period to which it relates. Where grants and contract income received have conditions or restrictions as to their use attached the income is recognised as restricted income funds. Where no such conditions or restrictions exist, grants and contract income received are recognised as unrestricted income.

Investment income in respect of funds held on deposit is included when receivable and the amount can be measured reliably. This is normally upon notification of the interest paid by the bank.

Other income is recognised in the Statement of Financial Activities when receivable; this relates largely to the reimbursement of expenditure.

### 1.3 Donated services

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

### 1.4 Expenditure recognition

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably. All expenditure is accounted for on an accruals basis. All expenses, including support costs and governance costs, are allocated or apportioned to the applicable expenditure headings in the statement of financial activities.

Charitable expenditure comprises those costs incurred by the Charity in the delivery of its charitable activities and services. It includes both costs that can be allocated directly to such activities and costs of an indirect nature which are necessary to support them. Those support costs of an indirect nature include the resources of senior management, personnel, HR, IT, premises, finance and governance which are apportioned on a basis consistent with the use of resources largely by reference to time spent although alternative methods of apportionment may be used where they produce a more equitable result. Details of apportionment of support costs are shown in note 5.

## 1.5 Pension costs

The Charity operates workplace pension schemes for its qualifying employees. The schemes used are the government established National Employment Savings Trust (NEST) and Standard Life Stakeholder Scheme. Both schemes are defined contribution schemes and the amount included in the Statement of Financial Activities represents the contributions payable to the scheme in respect of the accounting period.

## 1.6 Operating leases

Leases in which substantially all the risks and rewards of ownership are retained by the lessor are classified as operating leases. Rentals payable under operating leases are charged to the Statement of Financial Activities over the term of the lease. The Charity has operating leases for the premises from which it operates. The title of the leased premises remains with the lessor.

## 1.7 Fixed assets

Where fixed assets are purchased they are stated at their purchase cost plus any incidental expenses of acquisition. Where fixed assets are donated, they are stated at their estimated market value on acquisition. Depreciation is charged in respect of fixed assets and is calculated so as to write off the cost of the assets, less any estimated residual value, over their expected useful economic useful lives as follows:

Office equipment and furniture - 25% straight line.

## 1.8 Cash and cash equivalents

Cash and cash equivalents includes cash in hand and other short term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

## 1.9 Taxation

Dorset Mental Health Forum is a registered charity and is therefore not liable to taxation to the extent that its income and gains are applicable to charitable purposes only. Value added tax is not recoverable and is therefore included in the relevant costs in the Statement of Financial Activities.

## 1.10 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Board in furtherance of general objectives of the Charity, and which have not been designated for other purposes.

Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

Restricted funds are to be used for specific purposes as laid down by the donor. Expenditure which meets this criterion is charged to the fund, together with fair allocation of management and support costs as appropriate.

## 1.11 Financial instruments

The Charity only has financial assets and liabilities that qualify as basic financial instruments including trade and other debtors, cash and bank balances and trade and other payables. Basic financial instruments are initially recognised at transaction price and subsequently at amortised cost.

## 1.12 Critical accounting estimates and judgements

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

The Trustees are of the opinion that there are no estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

## 2. Income from donations and legacies

	Unrestricted Funds	Restricted Funds	Total Funds 2024	Unrestricted Funds	Restricted Funds	Total Funds 2023
	£	£	£	£	£	£
Donations and gifts	1,930	-	1,930	8,087	-	8,087
	<b>1,930</b>	<b>-</b>	<b>1,930</b>	<b>8,087</b>	<b>-</b>	<b>8,087</b>

## 3. Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds 2024	Unrestricted Funds	Restricted Funds	Total Funds 2023
	£	£	£	£	£	£
<b>Advocacy Services</b>						
Dorset Council	-	11,099	11,099	-	66,596	66,596
Dorset Healthcare	-	1,261	1,261	-	7,565	7,565
BCP Council	-	16,650	16,650	-	99,898	99,898
<b>Lived Experience Infrastructure</b>						
Dorset HealthCare	84,259	-	84,259	84,259	-	84,259
NHS Dorset ICB	10,000	-	10,000	10,000	-	10,000
BCP Council	5,000	-	5,000	5,000	-	5,000
<b>Recovery Education Centre (REC)</b>	-	75,235	75,235	-	33,800	33,800
<b>Dorset Wellbeing and Recovery Partnership</b>						
Dorset HealthCare	-	907,237	907,237	-	755,995	755,995
DMH Carers Project Income	-	3,000	3,000	-	3,000	3,000
<b>Employment Service</b>	-	125,000	125,000	-	125,000	125,000
<b>Sports and Social Programme</b>	-	3,995	3,995	-	4,013	4,013
<b>SMI Physical Health</b>	-	47,800	47,800	-	20,328	20,328
<b>Dorset Open Door</b>	-	71,878	71,878	-	69,718	69,718
<b>Suicide Prevention</b>	-	27,000	27,000	-	22,244	22,244
<b>Health Education England</b>	-	45,305	45,305	-	101,960	101,960
<b>Social Enterprise</b>	17,036	-	17,036	1,875	-	1,875
	<b>116,295</b>	<b>1,335,460</b>	<b>1,451,755</b>	<b>101,134</b>	<b>1,310,117</b>	<b>1,411,251</b>

## 4. Expenditure on charitable activities

	Activities undertaken directly £	Support Costs £	Total 2024 £	Activities undertaken directly £	Support Costs £	Total 2023 £
Advocacy	57,941	14,284	72,225	129,448	41,417	170,865
WaRP Projects	671,554	216,573	888,127	609,802	178,451	788,253
WaRP Core	103,106	-	103,106	52,184	-	52,184
Sports and Social	1,055	-	1,055	4,013	-	4,013
National Lottery Community Fund	-	-	-	64,375	17,201	81,576
DMH Carers Project	-	-	-	804	-	804
NHS Dorset ICB	243,130	76,455	319,585	169,652	35,370	205,022
Charity Development	-	-	-	14,400	-	14,400
Digital Development	-	-	-	5,199	-	5,199
Talbot Village Trust	19,387	5,996	25,383	54,434	19,879	74,313
Health Education England	551	-	551	46,200	-	46,200
Evaluation Activities	-	-	-	1,980	-	1,980
	<b>1,096,724</b>	<b>313,308</b>	<b>1,410,032</b>	<b>1,152,491</b>	<b>292,318</b>	<b>1,444,809</b>

## 5. Analysis of support costs

	Advocacy £	WaRP Projects £	Talbot Village Trust £	NHS Dorset ICB £	Total £
<b>Central Services</b>					
HR	2,550	38,285	1,038	12,660	54,533
Finance	2,481	39,048	1,003	12,955	55,487
IT	2,668	41,652	1,136	13,725	59,181
CEO	2,718	42,051	1,099	13,850	59,718
Director of Operations	917	14,012	374	4,701	20,004
<b>Premises &amp; Office</b>	586	8,936	251	2,922	12,695
<b>Governance &amp; Strategic Costs</b>	443	18,826	250	6,267	25,786
<b>PR &amp; Marketing</b>	1,139	13,763	486	4,378	19,766
<b>Business Manager</b>	782	-	359	4,997	6,138
	<b>14,284</b>	<b>216,573</b>	<b>5,996</b>	<b>76,455</b>	<b>313,308</b>

Support costs have been apportioned based on actual delivery hours.

## 6. Auditor's remuneration

	2024 £	2023 £
<b>Audit fee</b>	7,194	6,382
<b>Accountancy fees</b>	5,010	4,580
<b>Payroll services</b>	5,233	4,292
<b>Other services</b>	202	7,745
	<b>17,639</b>	<b>22,999</b>

## 7. Trustees expenses and remuneration

No remuneration has been paid to or on behalf of the Trustees (2023: Nil).

One trustee (2023: None) had expenses reimbursed during the year of £148 (2023: Nil).

## 8. Employees and employment costs

	2024 £	2023 £
Wages and salaries	1,013,609	946,180
Social security costs	68,584	69,442
Pension costs	36,225	30,834
	<b>1,118,418</b>	<b>1,046,456</b>

No employees were paid over £60,000 (2023: none).

The average monthly headcount (number of staff employed) during the year was:

	2024 People	2023 People
Number of Staff	72	76

The full time equivalent number of staff employed on 31 March 2024 was:

	2024 No	2023 No
Full time equivalent number of staff	35	39

The key management personnel of the Charity are considered to be the Chief Executive Officer, Director of Operations. The total employee benefits for key management personnel were £122,641 (2023: £109,703).

The Charity operates defined contribution pension schemes. The pension cost charged to the Statement of Financial Activities for the period represents contributions payable by the Charity to the schemes and amounted to £36,225 (2023: £30,834).

Volunteers contribute unpaid time to the services provided by the Charity. The estimated volunteer time for the period amounted to approximately 3,520 hours (2023: 3,650 hours), totalling an estimated £63,360 (2023: £62,050), which has not been reflected in the Statement of Financial Activities in accordance with the Charities SORP (FRS 102).

## 9. Tangible fixed assets

	Office Equipment & Furniture £	Total £
<b>Cost</b>		
As at 01.04.23 and 31.03.24	6,032	6,032
<b>Depreciation</b>		
As at 01.04.23	5,283	5,283
Charge for year	749	749
<b>As at 31.03.24</b>	<b>6,032</b>	<b>6,032</b>
<b>Net book value</b>		
As at 31.03.24	-	-
As at 31.03.23	749	749

## 10. Debtors

	2024 £	2023 £
Debtors	199,444	18,725
Prepayments	3,640	4,156
	<b>203,084</b>	<b>22,881</b>

## 11. Creditors: Amounts falling due within one year

	2024 £	2023 £
Creditors	1,671	8,776
Accruals and deferred income	179,523	365,144
Other tax and social security	19,941	-
Other creditors	1,563	2,783
	<b>202,698</b>	<b>376,703</b>

## 12. Related party transactions

There were no related party transactions during the year. (2023: None.)

Remuneration paid to key management personnel is disclosed in note 8.

## 13. Reconciliation of net income/(expenditure) to net cashflow from operating activities

	2024	2023
	£	£
<b>Net income/ (expenditure) for the period as per the Statement of Financial Activities</b>	79,299	(11,701)
Adjustments for:		
Depreciation charges	749	1,508
(Increase)/decrease in debtors	(180,203)	321,102
(Decrease) in creditors	(174,005)	(9,544)
Interest from investments	(34,241)	(12,534)
<b>Net cash (used in)/ generated by from operating activities</b>	<b>(308,401)</b>	<b>288,831</b>

## 14. Operating lease

Dorset Mental Health Forum is due to pay the following future minimum lease payments under non-cancellable operating leases for which it is the lessee, for each of the following periods:

	2024	2023
	£	£
<b>Payments</b>		
Within one year	1,181	1,181
Due in two to five years	1,475	2,656
	<b>2,656</b>	<b>3,837</b>

# 15. Statement of funds

	Balance 01.04.23	Income	Expenditure	Transfer	Balance 31.03.24
	£	£	£	£	£
<b>Unrestricted funds</b>					
General funds	284,597	153,871	(103,106)	-	335,362
<b>Designated funds</b>					
Charity development	25,000	-	-	-	25,000
Digital development	15,000	-	-	-	15,000
Evaluation activities	23,020	-	-	-	23,020
<b>Total Unrestricted funds</b>	<b>347,617</b>	<b>153,871</b>	<b>(103,106)</b>	<b>-</b>	<b>398,382</b>
<b>Restricted funds</b>					
Advocacy	72,244	29,010	(72,226)	-	29,028
Employment	39,775	-	-	-	39,775
Community Development	64,630	-	-	-	64,630
WaRP	660,127	822,455	(888,126)	44,754	639,210
DMH Carers Project	7,389	3,000	-	-	10,389
Sports and Social	3,326	3,995	(1,055)	-	6,266
Talbot Village Trust	25,383	-	(25,383)	-	-
NHS Dorset ICB	33,047	431,695	(319,585)	-	145,157
Health Education England	-	45,305	(551)	(44,754)	-
<b>Total Restricted funds</b>	<b>905,921</b>	<b>1,335,460</b>	<b>(1,306,926)</b>	<b>-</b>	<b>934,455</b>
<b>Total funds</b>	<b>1,253,538</b>	<b>1,489,331</b>	<b>(1,410,032)</b>	<b>-</b>	<b>1,332,837</b>

## Restricted Funds

- Advocacy funds for people experiencing mental health problems in Dorset made available from a range of sources, including Dorset County Council, Bournemouth Borough Council, BCP Council and Dorset HealthCare University NHS Foundation Trust (DHC).
- Employment funds held to provide employment related activities to individuals and local employers in Dorset.
- Community development funds (previously named Social Inclusion) held for projects to be started in the future.

## 15. Statement of funds (continued)

- The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised partnership between Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust which puts lived experience expertise at the heart of service design and delivery, to transform services and affect culture change. Funding supported around 25 different partnership projects and workstreams during the year. The Recovery Education Centre (REC), Dorset Work Matters, the Discovery Project and the Retreats were four of these projects.
- Funds received and administered for the independent Dorset Mental Health Carers Project, supported by the Dorset Mental Health Forum.
- Active Dorset funds held for the delivery of DMHF Climbing Satellite Club as part of the Forum's Sports and Social Programme.
- National Lottery Community Fund grant funds have enabled influencing and culture change activities around mental health in Dorset, building capacity within communities.
- Talbot Village Trust grant funds have enabled lived experience outreach activities and Recovery Education in local communities across Southeast Dorset.
- NHS Dorset funds received for delivery of range of projects including mental health support in Primary Care, SMI Physical Health Checks, Suicide Prevention, Neurodiversity and Dorset Open Door.
- Health Education England funds received for lived experience workforce development.

### Designated Funds

- Designated Charity development funds held for the specific purpose of meeting expenditure directly related to the development of the Charity.
- Designated Digital development funds held for the specific purpose of meeting expenditure directly related to digital transformation work within the Charity.
- Designated Evaluation activities funds held for the specific purpose of meeting expenditure directly related to evaluation activities within the Charity.

## 16. Analysis of net assets between funds

	Unrestricted Funds	Restricted Funds	Total Funds 2024	Unrestricted Funds	Restricted Funds	Total Funds 2023
	£	£	£	£	£	£
Tangible fixed assets	-	-	-	749	-	749
Current assets	434,576	1,100,959	1,535,535	369,389	1,260,103	1,629,492
Creditors due within one year	(36,194)	(166,504)	(202,698)	(22,521)	(354,182)	(376,703)
	<b>398,382</b>	<b>934,455</b>	<b>1,332,837</b>	<b>347,617</b>	<b>905,921</b>	<b>1,253,538</b>

## 17. Statement of funds for the year ended 31 March 2023

	01.04.22 £	Income £	Expenditure £	Transfer £	31.03.23 £
<b>Unrestricted funds</b>					
General funds	241,639	122,991	(52,184)	(27,849)	284,597
<b>Designated funds</b>					
Charity Development	21,400	-	(14,400)	18,000	25,000
Digital Development	10,350	-	(5,199)	9,849	15,000
Evaluation activities	25,000	-	(1,980)	-	23,020
<b>Total unrestricted funds</b>	<b>298,389</b>	<b>122,991</b>	<b>(73,763)</b>	<b>-</b>	<b>347,617</b>
<b>Restricted funds</b>					
Advocacy	69,050	174,059	(170,865)	-	72,244
Employment	39,775	-	-	-	39,775
Community Development	64,630	-	-	-	64,630
WaRP	603,604	789,016	(788,253)	55,760	660,127
Sports and Social	3,326	4,013	(4,013)	-	3,326
National Lottery	81,576	-	(81,576)	-	-
Talbot Village Trust	99,696	-	(74,313)	-	25,383
NHS Dorset ICB	-	238,069	(205,022)	-	33,047
DMH Carers Project	5,193	3,000	(804)	-	7,389
Health Education England	-	101,960	(46,200)	(55,760)	-
<b>Total restricted funds</b>	<b>966,850</b>	<b>1,310,117</b>	<b>(1,371,046)</b>	<b>-</b>	<b>905,921</b>
<b>Total funds</b>	<b>1,265,239</b>	<b>1,433,108</b>	<b>(1,444,809)</b>	<b>-</b>	<b>1,253,538</b>

# Reference and Administrative Details

## Trustees

Ann Abraham (Chair)  
Chris Balfe (Retired December 2023)  
Alison Chorley  
Sorrelle Ford  
Tim Harry  
Peter Lovibond  
Arthur Merchant  
Sarah Murray  
Davide Rodrigues

## Chief Executive

Becky Aldridge

## Principal Office

Dorset Mental Health Forum  
29/29A Durngate Street  
Dorchester  
Dorset  
DT1 1JP

## Senior Statutory Auditor

Adam Knight FCA  
A C Mole LLP  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX

## Principal Bankers

National Westminster Bank Plc  
Dorchester Branch  
49 South Street  
Dorchester  
Dorset  
DT1 1DW



**The collective voice of lived experience**

29A Durngate Street, Dorchester, Dorset DT1 1JP  
01305 257172  
[www.dorsetmentalhealthforum.org.uk](http://www.dorsetmentalhealthforum.org.uk)

**DORSET MENTAL HEALTH FORUM**

England & Wales - Charity number 1169215

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# Accounts

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**DORSET  
MENTAL HEALTH  
FORUM**

Promoting wellbeing & recovery

# ANNUAL REPORT & ACCOUNTS 2022-2023



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# Welcome from our Chair & CEO

**The Trustees have pleasure in presenting their Annual Report and the financial statements for the year ended 31 March 2023. The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Constitution and the Charities Act 2011.**

We introduce our Annual Report for 2022/23 by first thanking and celebrating our inspirational workforce, who bring their own life and lived experience every day to their work as they model Recovery and influence people's understanding of mental health. We could not have achieved such impact for people in Dorset this year without the dedication, commitment and continued hard work of our whole workforce.

The last year has been one of challenge, change and transformation. It continues to be a difficult time for people and communities throughout Dorset, with the aftermath of the pandemic, the cost of living crisis and increased pressure on mental health and social care services in Dorset.

During 2022/23 we are very proud to have responded positively to the challenges and change around us, evolving and structuring our work and activities to meet and support people on their own terms, educating and enabling people, services and systems to celebrate and build on what is strong, in order to meet the challenges of today and those of the future.

This year has seen a strong focus on collaboration and integration throughout mental health services and across the Dorset System. This has included a commitment to embedding partnership working with the broader voluntary and community sector within local mental health services moving forward. We have been delighted to bring our expertise and support to this significant and important transformation work, facilitating coproduction and ensuring that people's voices and perspectives are heard and integrated throughout the shaping and design of future services. By supporting people and local organisations to share their voices, we have continued to build capacity within services and communities.

Looking ahead into 2023/24, we are excited to be building on developments in recent years, as we review our Strategy and look to the future, informed by the needs of beneficiaries and stakeholders. We believe that our work will be even more relevant and vital in the years ahead and we remain deeply committed to and passionate about driving social and cultural change in Dorset.



**Ann Abraham**  
Chair of the Trustee Board



**Becky Aldridge**  
CEO

# Strategic Report

## About Us

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and coproduction.

We believe that experiencing mental ill health and managing one's symptoms, should not preclude or diminish a person's right to enjoy all of the opportunities that life can provide, as with managing any physical health condition. This is one of the aspirations that sits behind all our work, along with a passionate desire to challenge the stigma, prejudice and discrimination that still exists around people's experiences of mental health problems.

We have contact with many people who do not want to be defined by their illness or diagnosis, despite managing serious long-term conditions. Many people can lead meaningful and satisfying lives, others require more support to do so, often having been supported by services for most of their lives.

Recovery is at the heart of all that we do, enabling and promoting the value and efficacy of people doing for themselves what they have traditionally been reliant on services to provide, encouraging an environment where people work in partnership with providers of care and treatment, in order to build the lives they wish to live.

**“Recovery is not about ‘getting rid’ of problems. It is about seeing people beyond their problems - their abilities, possibilities, interests and dreams - and recovering the social roles and relationships that give life value and meaning.”**

*(Repper and Perkins, 2003)*





## Our Vision

A world that understands mental health: where individuals and communities can enjoy good mental health, shared humanity and appropriate support when they experience emotional distress and trauma.

## Our Mission

To increase understanding of mental health, to support people's Recovery and to build capacity within services and communities to bring about change.

We deliver our Mission through four **Strategic Aims:**

- Increase understanding of mental health through Recovery Education and Coproduction.
- Support and enable people to live the lives they wish to live.
- Develop capacity and build connected communities across Dorset.
- Influence and transform local services with collective voice of lived experience expertise.

## Our Values

Guide everything that we do:

- **Honesty** is our foundation stone.
- Our work requires **Courage**, to be vulnerable and to grow.
- We know the power of **Compassion**.
- **Respect** for who we are is a human right.
- Having **Integrity** means living our values and staying true to our purpose.

## Our Beliefs

We believe:

- That people with lived experience of mental health problems have a wealth of specialist knowledge, valuable expertise and experiences.
- In the effectiveness of partnership working in the design and provision of services.
- That everyone has an equal right to enjoy all the opportunities that life provides.
- That there is 'no health without mental health' and that 'mental health is everyone's business'.
- That individuals and communities hold many of their own solutions.
- That hope, mental health and wellbeing are essential to us all.



# Activities and Objectives

## What we do

We are a community of people who have experiences of mental distress and managing a mental health condition, experiences of trauma, living with long term health issues or caring for someone who is in emotional distress. Our lived experience infrastructure brings the collective voice of lived experience expertise to the heart of real and sustainable change across Dorset.

Utilising our lived experience expertise, we influence and facilitate significant culture change around mental health in Dorset, as well as undertake a range of specialist independent and partnership activities to fulfil our mission and objectives, supporting individuals, communities and local systems to understand mental health. Intrinsic to this work is modelling Recovery, developing capacity and capability within individuals and communities.



## Sports and Social

Our Sports and Social Programme works with individuals and organisations to offer different activities across Dorset, developing connections and helping people to build a life within their local community.

## Advocacy

Our Dorset Mental Health Advocacy Service supports people to have a voice and exercise their rights in matters that directly affect their lives. This includes times when they may be subject to the Mental Health Act.

## Dorset Wellbeing and Recovery Partnership (WaRP)

The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised, formal partnership between the Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust, putting lived experience expertise hand in hand with professional and technical expertise. The Partnership promotes coproduction and drives culture change across the Integrated Care System in Dorset.

Together the Dorset Wellbeing and Recovery Partnership provides the following projects:

## Dorset Recovery Education Centre

Dorset Recovery Education Centre (REC) provides Recovery focused, educational opportunities that enable people to identify their strengths, find hope and build skills, to reframe their experiences of trauma and emotional distress.

## Discovery Project

Discovery Project works closely with schools and youth projects to facilitate participation and create mechanisms for young people to have a voice within local services and their communities.

## Dorset Open Door

Dorset Open Door is a collaborative, multiagency bereavement support and signposting service for people in Dorset who have been bereaved by trauma or suicide.

## Retreats

Retreats provide a collaborative approach to crisis support in Dorset, through open access safe spaces for people to make sense of their distress in times of self-defined crisis.

## Peer Specialists

Peer Specialists within services are staff who intentionally utilise their lived experience of mental health issues, trauma, and emotional distress, to support Recovery oriented practices within local services and broader communities across Dorset.

## Carers Project

Carers Project supports the development of lived experience voices of carers, particularly people who have been bereaved by suicide or cared for people who have experienced complex trauma.

## Dorset Work Matters

Dorset Work Matters provides an Individual Placement and Support (IPS) employment service to people accessing secondary mental health services, as part of a broader ambition to create meaningful vocational opportunities for people in Dorset.



# Strategic Objectives for 2021-2024

We reviewed and refreshed our strategy during 2021, in the wake of the pandemic and it being evident that our vision of a world that understands mental health and our mission to increase understanding of mental health, to support people's Recovery and to build capacity within services and communities, are still very relevant and required by beneficiaries and stakeholders today.

The Forum's current Strategy for 2021-2024 speaks to deepening inequalities and social justice issues, with our current activities focused around eight Strategic Objective areas, detailed opposite:



1

## Education

Broaden reach of Recovery Education, including PCNs, Dept for Education, Public Health, building literacy around impact of trauma.

2

## Agency

Enable people to build their lives beyond services, through community activities, citizenship, learning and Recovery.

3

## Activism

Develop channels for grassroots activism, to enable people's voices to be heard, advocating for equality and social justice.

4

## System

Further develop WaRP as Dorset ICS system partner, supporting delivery of Prevention at Scale and Population Health agendas.

5

## Parity

Promote parity between physical and mental health, challenging health inequalities, through lived experience perspective.

6

## Connection

Develop diverse access and alternative options for people to understand and reframe their life and mental health experiences.

7

## Collaboration

Develop reciprocal collaborations within local communities to build capacity, add value and amplify people's voices.

8

## Employment

Pioneer development of peer employment pathways and opportunities across the Dorset System, building understanding and capability.

We are working within our Strategic Aims during 2021-2024 to make a difference for the people of Dorset, within these eight Strategic Objective areas.

We have developed three supporting strategies to enable and support delivery of our Strategy 2021-24:

- **People Strategy** – Continuous learning, growth and development for our thriving workforce.
- **Sustainability Strategy** – Developing longer term financial and environmental sustainability.
- **Influencing Strategy** – Building our collective voice for influence and to bring about change.

# Achievements and Performance during 2022/23

## Lived Experience Infrastructure

**Our diverse lived experience infrastructure brings an alternative perspective around mental health to local services and communities, challenging stigma through lived experience expertise and coproduction. We continue to evolve and strengthen our lived experience infrastructure, creating opportunities and mechanisms for people to make sense of and reframe their experiences, utilising their learning to model Recovery, increase understanding, give hope and support to others and influence change in Dorset.**

Our courageous and inspiring workforce promote and model the principles of Wellbeing and Recovery in various roles and settings throughout the organisation, local services and across Dorset. Our staff are employed in many different roles, utilising their lived experience and technical expertise. Employment is an intrinsic part of our people's own Recovery journeys, as they discover and develop skills and resilience to build the lives they wish to live, focusing on their strengths, rather than deficits, "what's strong, rather than what's wrong".

Maintaining a psychologically safe, values-based workplace and culture throughout our organisation is paramount for our work. Many of our workforce have experienced periods of crisis and trauma in their lives. Our people demonstrate courage, tenacity and compassion within their work and in support of their colleagues every day. Developing capacity, resilience and sustainability across the organisation to support the workforce and to fulfil our purpose and objectives as a charity continues to be our priority.

This year, we have focused on the development of our workforce. We have introduced more clarity and structure to the way we recruit and train staff, launched an employee benefits package to support physical health and longer-term financial planning and enhanced how we support people's wellbeing at work.

We have developed pathways and more opportunities for people to contribute to the Forum's work, created a better experience for people exploring peer work and promoted a more diverse selection of job roles offering supported and substantive employment.

We have also developed more opportunities for career progression for staff. Some people have grown and been promoted within the organisation; others have benefited from understanding more about their transferable skills and moved on from the Forum to develop diverse careers in different sectors across Dorset.

Gaining understanding and learning from the experiences of our staff and our beneficiaries is core to everything that we do. Through engagement activities, we have been able to understand the importance of reciprocity and contribution within people's personal Recovery journeys.

During the year, we have also created more spaces for people to engage and share their stories. This has included developing a strong digital presence on social media platforms and launching a new website that encourages people to get involved, as well as tells the Forum's story. This has been particularly important and significant this year, as we have been celebrating 10 years of the Recovery Education Centre and 30 years of the Forum.

We are proud to represent lived experience perspectives within our communities and the Integrated Care System in Dorset. There has been a lot of change and transformation during the year and much of our work has been focused on ensuring that the voices, experiences and perspectives of people who access services in Dorset are at the heart of service planning, shaping, design and delivery.



We have had over

75

people in our workforce  
utilising their experiences

We have provided

46,055

hours of lived experience  
expertise across Dorset

**"The Forum uniquely evolves to meet the needs of its beneficiaries. We listen even in difficult circumstances. There is a culture of accountability that has influenced me as a person, at work and in my personal life."**

*(Staff Member, 2022)*

# Strategic Objective: Education

**Broaden reach of Recovery Education, including Primary Care Networks, Department for Education, Public Health, building literacy around impact of trauma.**

The need to understand mental health in our society and in our community is growing. The cost of living rises, increased disenfranchisement and the legacy effects of the pandemic have all led to increased pressure on mental health and social care services in Dorset. As a result of this, Recovery Education and access to self-directed support has never been more important.

In 2022-2023, we have provided access to digital resources and information that can help people to make sense of their experiences and be better informed about what support they may or may not need from services. We have increased the number of Recovery Education Centre (REC) courses that we provide, as well as accessibility, by providing more choice and options for layered learning. Students tell us that gaining knowledge and understanding of their own strengths and resources can reduce reliance on mental health professionals and lead to increased aspiration, self-efficacy and control in their lives.

Staff working within the mental health system have experienced periods of extreme challenge in recent years. Staff describe a need to have access to a safe environment where they can explore meaning and purpose within their work and rekindle their hope for the future. Through Recovery Education, staff have been able to reconnect with why they chose their work and to see their own strengths and assets, enabling them to build resilience and create more space to hear people in distress within their work.



As conversation and awareness around mental health increases, people working and living within our broader community are also looking to explore different ways to understand the impact of emotional distress and trauma. This includes voluntary and community (VCSE) organisations, faith communities, communities of interest and family networks. Skills to support self-advocacy and signposting form an integral part of the valuable work that the Forum team undertakes.

- We offered **2,130** places on REC courses, with **1,586** attendances. New courses included: Making Sense of Grief, Understanding ADHD and Window of Tolerance. These courses explore our response to trauma and help students to gain a better understanding their normal emotional responses.
- We had **5,953** visits to the learn online portal where students can download resources and undertake a self-directed learning approach to Recovery Education. Students are increasingly reporting value in layering their learning by making sense of things for themselves prior to attending a group session. These sessions support a strengths-focused approach and aid meaningful participation.
- We offered **624** individual learning plan appointments. These sessions are a learning activity and provide an opportunity for individuals to identify their own strengths and aspirations, as well as for staff to offer signposting to a range of community resources. These sessions also enable individuals to make better use of mental health and community support services.

## Impact

**2022-2023** saw us celebrate **10 years** of the Recovery Education Centre in Dorset. We now have **more than 7,500** registered students and the number continues to grow. Recovery Education has fundamentally changed the way that people make sense of their experiences and helped to provide a framework that promotes Recovery and enables people to expect more from their life.

**"I felt welcomed, relaxed atmosphere, my contributions were respected and valued. Great opportunity to meet others and share thoughts about future of the REC."**

*REC student*

**"I realise that showing compassion and kindness is as important, if not more so, than helping to facilitate the person to find solutions."**

*Staff workshop attendee*

**"G re-engaged with the REC in November 2022 and booked a review appointment online using Attend Anywhere. G was already enrolled and had previously attended a course back in 2017 but was reminded about the REC when visiting the Retreat.**

**G had previously enrolled to support their own wellbeing but was now looking to attend to refresh their skills in order to better support other people. G is considering going back into support work and was looking at all opportunities to continue learning about physical and mental health challenges. During the ILP review, the courses that may be relevant to these goals were discussed. G was particularly interested in all Recovery courses and how the concept of Recovery was viewed and explored within Recovery Education. To help achieve aspirations for employment, G is going to explore other education opportunities, completing a peer mentoring course and a supporting others course. G has also booked on to other REC courses in the coming term."**

*REC Admissions Tutor*

# Strategic Objective: Agency

Enable people to build their lives beyond services, through community activities, citizenship, learning and Recovery.

As an organisation, we fundamentally believe in a person's right to build the life they wish to live. The definition of what that looks like is informed by a range of factors. This includes the environment in which a person was raised, circumstances that have defined a person in their formative years and a person's opportunity to connect with hope and aspiration.

During 2022-2023 we have focused on supporting individuals to build a life beyond services and beyond their mental health difficulties or experiences of trauma. We have spent more time alongside people, advocating for them and encouraging them to value themselves and find their voice. Through this process we have been able to develop a broader offer for people which is more local and engages with a range of assets and opportunities within a person's community. We have worked to reduce the barriers that people face and ensure that there is opportunity for people to explore bolder aspirations.



As an organisation built on the collective experiences of people, we understand the importance of storytelling. Creating opportunities for people to make sense of their story enables them to see their own strengths and successes and to make informed choices about what matters to them.

- We ran **1,333** groups across the community, offering football sessions, craft groups, walks, social groups, gym sessions, mother and baby groups as well as ad hoc activities, such as football tournaments, cinema sessions and day trips.
- We worked with **558** people individually, focusing on building a life within their local community. These conversations focused on building relationships, practical support, advocacy and signposting.
- We worked with **40** individuals referred from the Criminal Justice System, supporting them to identify what is important for their future, what wellbeing means for them and to build social connection within their local community.

## Impact

People tell us that sometimes they see their problems as inevitable and it can be hard to be hopeful for the future. Having hope and a belief that things can be different is an essential part of Recovery. Members of our Sports and Social Programme have described feeling listened to and included within their local community, leading them to see their own value and worth. During 2022-2023 people have been more active, moved into volunteering and employment opportunities and challenged themselves (and others) more, as well as contributed to community regeneration and development initiatives.

**"The walking groups give me something to look forward to. I am able to get out and experience a different place safely and with company. I find this invaluable. Groups provide much needed structure, exercise and social contact and whoever is taking it you can be sure to explore the area and end up with a chat and cuppa.**

**There is a choice of attending a gym group (which adds to my exercise routine) and social groups that I find energising and uplifting, without these groups I would be lost.**

**I am recovering from substance abuse issues, schizophrenia, anxiety and depression and these sessions give me a safe place to function and I really don't know where I would be without them. They have given me a safe, manageable and dare I say it enjoyable life."**

*Sports and Social attendee*

**"Most weeks, we now have a regular cinema get together organised by attendees themselves. They have started a fortnightly Sunday lunch club too. There are also discussions among the group about starting a gardening get together, in between structured groups.**

**All really pleasing as attendees are building up friendships, their confidence and social skills which is bringing about these great social opportunities for others too."**

*Social Inclusion Coordinator*

# Strategic Objective: Activism

Develop channels for grassroots activism, to enable people's voices to be heard, advocating for equality and social justice.

As the national and local conversations around mental health evolve, it is increasingly important that people's voices, experiences and identities are amplified. We believe that as understanding and literacy builds around mental health, it is important that people do not become defined by their experiences.

There have been significant challenges for local services this year and this has meant that in some situations, people have had to become more unwell before they have been able to access support.

During 2022-2023 we have had increased focus on sitting alongside people in distress, listening and creating space for people to learn from periods of crisis. The cost of living crisis, housing issues and social care interventions have all added to people having a sense that their problems are uncontrollable. We have countered the perception that specialist expertise holds all the solutions and continued to utilise our collective lived experience to model Recovery.



**Challenging inequality and lending our voice to individuals and organisations who are often underrepresented in decisions that affect them, has also been a key focus of this year's work.**

- We advocated for **718** individuals supporting them to access their rights and to be heard. We have seen an increase in people needing support for access to appropriate mental health care, housing issues, debt problems and the deepening impact of the cost of living crisis.
- We contributed to **47** participation and engagement events across the local mental health system, supporting people outside our organisation to be heard and to contribute their experiences to shaping the way that local services are designed and delivered.
- We significantly increased access to digital resources across all social media channels and digital platforms with **120,921** digital interactions; increasing awareness, raising aspirations and supporting people to advocate for themselves.

## Impact

**When the way services are delivered changes, how we understand the role of services in our lives must change too. We believe that activism is about understanding your rights and what you should expect from life, regardless of the challenges you may be experiencing. We have worked alongside people to support them to identify what matters most to them, so that when (and if) they need support from services, this can be driven by their own needs and aspirations. It is only when this work is done that people experiencing mental health issues and the effects of trauma can truly partner with services in decisions about their care and treatment. This year, we have worked with people to expect to have more input and agency in their interactions with services.**

**"X has been a client of mine for several years, becoming significantly unwell in their mid-30s and experiencing unusual and life impacting symptoms. X struggles to form trusting relationships, which makes it very difficult for their voice to be heard in any decisions about their care. Building trust with X is something that has taken a lot of time, understanding the reasons why trust is difficult, being patient, being consistent and listening have all helped.**

**X has now allowed me to support them in meetings to review restrictions on their liberty and their care plan. We have been able to speak for the first time about hopes for the future and the possibility of leaving hospital."**

*Advocate*

**"E was detained under the Mental Health Act after becoming unwell while staying in the UK to study. Although E's mental health is improving, they have nowhere to go following discharge from hospital and will need ongoing support in the community. E needs support not only to have their voice heard, but also to navigate the legal implications of their right to remain in the UK while they recover. Due to their immigration status, things such as work, housing and financial support will potentially be withdrawn, leaving them vulnerable to crisis."**

*Advocate*

**"Because I was made to feel comfortable, I could contribute. Being able to go over things again and ask questions if I don't understand has made a difference. I haven't wanted to speak up before as I felt stupid."**

*REC Student*

# Strategic Objective: System

Further develop WaRP as Dorset ICS System partner, supporting delivery of Prevention at Scale and Population Health agendas.

Since we began in 1992, the Forum has operated from the belief that people who have lived experience of mental health difficulties and experiences of trauma have a wealth of specialist knowledge and valuable expertise to contribute to the design and delivery of the services created to support them.

As integration develops across the Dorset System, it is important that the commitment to collaboration and working in partnership is embedded throughout mental health services and the broader voluntary and community sector. During the year, we have supported the development of mechanisms to ensure that lived experience perspectives are acknowledged and there is accountability to the people of Dorset.



During 2022-2023, as local mental health community transformation programmes move into design and delivery phases, our role has been less about challenge and more about modelling what is possible. The landscape and operating environment has changed and the conditions created for systemic change and evolution. We have undertaken proof-of-concept projects, building on learning from the Partnership and working in a collaborative way across organisational boundaries.

- We brought lived experience leadership to **21** strategic integrated boards and steering groups, attended **310** meetings and ensured that people who access services and communities were represented in decisions about local service shaping, design and delivery.
- We provided **34,656** hours of lived experience expertise, within Partnership projects, ensuring that clinical, technical and learned expertise is partnered with the perspective and knowledge of people who experience mental health issues and the effects of trauma.
- We had direct contact with **2,405** staff working across the Dorset Integrated Care System, building literacy and understanding of the value and significance of lived experience expertise.

## Impact

We believe that integration is about acknowledging that we don't have all the answers ourselves and that by bringing together a range of perspectives and working together, we can create a different experience for people within Dorset. During 2022-2023, guided by the principles of coproduction, we have been able to diminish barriers for people and begin to support services to work with people in the context of their lives, rather than the context of the health and social care system itself.

**"It's amazing to hear how many people have been involved in the design of this (Mental Health Community Transformation) - I recognise many of the challenges myself and its comforting to know that patients' voices and staff are being listened to."**

*GP attending Engagement Event*

**"Coproduction is hard; it takes time that we just don't have. We are committed to working together but we are also an organisation in crisis, trying to keep our service going and meet increasing demand. It has been reassuring to know that in our absence, we are being acknowledged and that solutions will hopefully benefit all of us and our clients in the long run."**

*VCSE Organisation*

**"One of the most valuable elements to stand out from this opportunity is that it's a community-based activity providing an integrated environment which people choose to attend rather than a service being placed upon them. This group has benefitted many of our clients and gives them a chance to simply do something every day and normal in an extraordinary yet subtle way."**

*NHS Staff Member*

Strategic Objective:

# Parity

Promote parity between physical and mental health, challenging health inequalities, through lived experience perspective.

As described, this year there has been a strong focus on collaboration and integration across mental health services and the Dorset System. However, there remains work to be done around the interface between physical and mental health services. From our experiences, we know that there is a parallel between an individual's mental health recovery and a person's recovery from physical ill health.

**"We are often referred people who want to reduce their drinking, stop smoking or lose weight. Almost without exception, people are either suffering with mental health issues already or their circumstances are impacting on their wellbeing. It has been really helpful to consider the impact of trauma on physical as well as mental health"**

*VCSE Staff Member*



Better integration between primary and secondary services along with education in the community, can support individuals and staff to understand the link between people's physical health and mental health. Fear and stigma often prevent people talking about their distress. By creating spaces for people to explore what matters to them, we often uncover issues such as living with chronic pain, mobility restrictions, substance misuse and other physical symptoms. These issues are often the biggest barriers to Recovery and enabling people to live the lives they wish to live.

- We developed **2** new Recovery Education courses and a range of resources focused on parity of esteem and health inequalities. Delivered through courses, digital resources and workbooks, these provide opportunities for people to explore this subject in a self-directed way.
- We worked directly with **252** people experiencing mental health issues with a specific focus on physical health; supporting activities that promoted physical activity and linking with primary care to improve access to Serious Mental Illness (SMI) physical health checks and other physical health improvement opportunities.
- We provided information and training to **180** staff and clinicians working principally with people experiencing physical health issues across Dorset. This enabled us to promote lived experience perspectives and enable people to have different dialogue with clients and patients.

## Impact

Understanding people in the context of their lives means seeing them as a whole person.

It has been important during 2022-2023 to get alongside individuals and hear their stories.

We are learning from different perspectives, such as why some people experiencing mental health issues and trauma self-medicate with drugs and alcohol.

We are hearing about the impact of poor physical health on a person's mental health and Recovery. Understanding people's experiences in the context of their lives helps us to work more broadly across health and social care services and to challenge inequalities.

"C experiences poor mental health and also has Parkinson's disease. They are divorced and live alone with no family nearby. When C first attended our social group (within the last year) it was with support.

Their Parkinsons disease and obvious anxiousness at meeting strangers, made them very shaky. Within just a few attendances they began to stop experiencing the shakes, as they were welcomed by all in the group and began to feel at ease with everyone.

C then started attending our walk/social with support and this has now developed into them coming alone but bringing their dog. C is also now a regular at our badminton session which is helping with their overall fitness.

C has informed me that they are in such a better place now, with health and confidence that they are considering cancelling the support they receive. They feel they would rather spend the costs on doing things they now enjoy such as socialising. It's great to see C's improved general wellbeing since attending our groups."

*Peer Specialist*

"D suffered a brain injury spending around 9 months in hospital. They are unlikely to ever be able to return to their previous career as a driver of large vehicles. Their memory at present is very poor and initially they attended our walks with their partner. Within a month they started to attend other sessions too including pool and social groups. D now attends most of these by themselves and has started using the bus too which until they attended with us, they never attempted. They are also starting to remember some attendees' names and it's really pleasing to see their memory slowly improving."

*Peer Specialist*

# Strategic Objective: Connection

Develop diverse access and alternative options for people to understand and reframe their life and mental health experiences.

During this past year we have seen increasing numbers of people who feel detached from their community and struggling to make connection. Even when people have strong support networks around them, experiencing a period of crisis or a trauma such as bereavement, can leave people feeling isolated. People tell us that being able to talk to someone who has been through a similar experience and come out the other side, has a powerful impact. They no longer feel alone in their distress and most importantly, they have hope that things can improve.

“I have used the Retreat on and off since it opened; it feels safe there and someone is always able to listen. I think, just knowing it is there has stopped me from going into a full crisis at times”.

*Retreat Visitor*



In 2022-2023, we have worked alongside people experiencing emotional distress, both independently and collaboratively with other organisations; focusing on what matters to the person and at times ensuring 'safe passage' in the onward part of their journey, through warm handovers and open-door approaches.

- We supported **119** people who have experienced traumatic bereavement to find appropriate support, by linking with other organisations, offering practical and peer support and enabling people to make sense of their grief.
- We worked with **1,433** individuals on a one-to-one basis, focusing on connection and providing opportunities for people to identify what is important to them.
- We sat alongside people in crisis through **8,944** attendances, providing space where people were not alone, supporting them in the prevention of further distress.

## Impact

This year we have worked hard to support people so that they do not have to be alone during difficult times. We know that having someone alongside and being able to share emotional distress in safety and without fear, judgement or retribution, can engender hope and the ability to see a path forward. During 2022-2023, many people have told us that learning from lived experience has helped them to see their own strengths and to aspire to things being different in the future. Many of the people we have supported in their darkest times, have gone on to support others, integrating learning from their experiences.

"L who lost their partner to suicide. They contacted the service immediately following the loss and they were really struggling to make sense of everything. We offered information about crisis support and signposting, as well as reassuring L that they could talk to us whenever felt right for them.

A few months later, L made contact again, still struggling, although they had made a self-referral for mental health support. Our work has been sitting alongside L so that they don't feel quite so alone while they are waiting for specialist support.

L said one of the biggest challenges had been not feeling able to talk about and remember their partner. The value of Dorset Open Door has been knowing that there are others who have experienced something similar."

*Dorset Open Door*

"S has been coming to our football group for a few years but took a massive step back last year due to losing their mum, dog, and close friend. On top of that, they have also had to deal with practical issues caused by their mum's passing.

After meeting a few times for coffee and a chat and reassuring them that they still have lots around them i.e. friends, they have now started to return to football and even joined another group. They even made a new friend with another one of our attendees."

*Social Inclusion Coordinator*

# Strategic Objective: Collaboration

Develop reciprocal collaborations within local communities to build capacity, add value and amplify people's voices.

As the Dorset Integrated Care System (ICS) evolves, there are a broader range of organisations coming together to cocreate opportunities for people to access support. These initiatives have matured during 2022-2023. We have been uniquely placed to support other organisations to understand the benefits and implications of Coproduction, ensuring that people's voices and perspectives are heard and integrated throughout.

"Thank you for spending some time with me today, I had no idea there was so much on offer in Poole. I think I can offer my clients a better explanation of what is available and it is so helpful to put a face to the project."

*Social Prescriber*



Reciprocity is essential to collaboration, which is more than simply working together; it requires understanding the unique perspective and value that each organisation brings and contributes to the work. Our experience in Coproduction has enabled us to work with voluntary and community groups to develop their understanding of their own assets and what they can bring to transformation and an integrated health and social care system in Dorset. During 2022-2023 we have worked with smaller, grassroots organisations and community-based projects, amplifying voices, celebrating diverse perspectives and creating opportunities. This has enabled us to learn more and challenge ourselves.

- We worked collaboratively with **287** community organisations to develop whole system approaches, reduce duplication, share learning and build capacity.
- We worked with **33** community groups focused on addressing a range of health inequalities.
- We partnered with **11** organisations to develop and deliver new projects in the heart of communities across Dorset.

## Impact

Many community groups across Dorset are poorly resourced and rely on passionate and committed individuals to undertake impactful work that makes a real difference to people's lives. During 2022-2023, we have added resource and value in the form of capacity and experience to local groups and organisations. By listening to what is important to these groups and the people that they are helping, we have been able to gather themes and better understand the presenting challenges and barriers, which in turn has informed and shaped the design and delivery of local services.

"We were approached by a local, but nationally renowned orchestra who were looking to develop a community focused, accessible offer for people who were struggling with their mental health and wellbeing. Understanding from our own lived experience that music can play a valuable part in Recovery, we were keen to explore opportunities for collaboration. We met to explore options and involved the Recovery Education Centre as previously students had been asking about creative opportunities.

Together we identified some staff and venues as well as a plan for collaborative promotion, as we were keen to ensure we reached a wide range of our community. The enthusiasm and passion for the project has been infectious. I have learned more about the benefits of creativity, and they have learned more about what lived experience can bring. We are looking forward to welcoming many more people to share their love (and talent) for music."

*Peer Specialist*

"We are seeing many more people who are experiencing mental health difficulties; we are overwhelmed. We think it is important that this is acknowledged, but I haven't got time to go to meetings and talk about these things; we need to be on the ground helping people. I am worried nothing will change unless people hear what it is like for us out in the community."

*Community Group*

Strategic Objective:

# Employment

Pioneer development of peer employment pathways and opportunities across the Dorset System, building understanding and capability.

Reciprocity and a sense of belonging, drive our organisational focus on employment. During 2022-2023 we have been involved in many workforce development conversations across the Dorset System. The value of lived experience is becoming more recognised within health services, social care and employers, on both a local and national level.



Our progress this year has been on the development of mechanisms that need to be in place to ensure that there is equity and opportunity around employment for people who experience mental health issues and trauma. We believe that people have a right to employment and to thrive in the workplace. Our own staff and the people that we work with continue to contribute their perspectives and experiences to enable us to create ambitions around employment for the future. Promoting Wellbeing and Recovery in the workplace, continues to be a priority for our organisation.

- Dorset Work Matters received **355** referrals from Community Mental Health Teams (CMHTs) and supported **150** people to achieve a positive work outcome.
- We welcomed **14** new staff, **7** people were promoted and **6** people increased their hours.
- We received **51** new enquires for people exploring a role in peer work and **1,360** people viewed the 'Join our workforce' page on our new website.

## Impact

During the year we have developed a stronger digital presence, clear signposting, **defined employment pathways** and more information on peer opportunities, leading to a **significant increase in people** looking to intentionally utilise their lived experience in the workplace. This is helping to develop and build workforce capacity for the future.

Within Dorset Work Matters, we have increased the amount of Employment Specialists working across Dorset with people in secondary mental health services. This ensures that a person's aspiration to work is acknowledged, alongside and with equal importance to medication and therapies, **enabling them to define and build the life they wish to live early on their Recovery journey.**

We have responded to an increase in job retention cases during the year, ensuring that people who are in employment but struggling, have access to the appropriate support and guidance to enable them to stay well in work. This work also enables employers to be better equipped to understand mental health and wellbeing within the workplace.

**"My manager coaches me to grow in my role and develop my potential at work."**

*Peer Specialist*

**"I was blown away by just how knowledgeable and precise they were with the support they offered within that initial session. I felt respected and understood."**

*Dorset Work Matters feedback*

**"I was still a little nervous about certain aspects of the job-hunting process. Whilst I felt resilient and ready, there was still residual trauma left over from my previous role and my prior attempts to find employment. My Employment Specialist was very understanding and reassured me throughout the process. They pushed me to work to my capabilities and helped me to overcome my previous anxieties around looking for work."**

*Dorset Work Matters feedback*

**"The support has been invaluable and it has encouraged me to do things that I never thought were possible. I now know the importance of considering my strengths. I am grateful for the Dorset Work Matters service."**

*Dorset Work Matters client*



# Future Plans

The Forum's Strategy for 2021-2024 and supporting strategies, are providing clear focus and road map for our work to influence change and deliver impact across our eight Strategic Objective areas.

Our future developments include:

## Diversity

Further developing our lived experience infrastructure and constituency networks to ensure that we are engaging and representative of different communities across Dorset. We are working intentionally to create pathways and provide opportunities for a more diverse workforce that can represent all aspects of experience in our society, increasing understanding and influencing change as part of delivering our strategy.

## Partnerships

Developing relationships across the Dorset System and local communities to collaborate, add value, build capacity, grow connections and influence change. We will continue to enable local communities to have an increased understanding of mental health, through Recovery Education and Coproduction.

## Income diversification

Developing different income generation and fundraising activities for longer term sustainability, independence and integrity to fulfil the Forum's charitable purpose.

## Demonstrating impact

Continuing to develop the Forum's systems and processes as part of our ongoing data journey, to capture and communicate the impact and outcomes of our work for funders, staff, beneficiaries and the wider public.

## Digital transformation

Building on considerable progress made in recent years to further embrace new ways of working and explore opportunities for developing innovation, efficiencies, quality assurance, governance, communication and engagement throughout all of the Charity's operations. This includes a commitment to supporting equality of opportunity, understanding different needs and continuous learning and development.



# Financial Review

## Financial Position

The Forum has a range of funding streams, which include contracts and grants to provide specific services, as detailed in the financial statements, as well as funding from grant making bodies to fulfil our aims and objectives. In addition to this, the Forum continues to develop its social enterprise activities. Many of our activities are currently focused within the NHS and wider integrated system, in order to bring lived experience expertise and challenge on behalf of beneficiaries to the shaping and future design of local mental health services. As with many third sector and 'Not for Profit' organisations, our funding streams are timebound, which means continual review of our funding strategy.

Maintaining independence as an organisation is vital in our work. Our fundraising strategy for the years ahead includes increasing our independent funding sources and further developing our social enterprise activities, in response to the growing awareness of the need to understand and respond to mental health differently across all sectors, communities and systems.

The Forum continues to manage its resources in an efficient manner and is therefore able to ensure that funding is targeted on developing and improving services. We recognise the necessity of raising funds and generating diverse income streams, in order to strengthen our service delivery and to fulfil our objectives and potential as an organisation. Achieving longer term financial sustainability is a priority for the years ahead, even more so as we anticipate financial pressures on public services in the years to come as a result of the pandemic and other global factors.

The Forum has received a number of generous donations and support throughout the year from individuals, legacies, community groups and organisations. We want specifically to acknowledge the Sarah Mullins netball fundraising event and support from Lester Aldridge, as well as generous donations from Mazars and fundraising activities undertaken by Joy Ford and Hayley Maslen.

The Trustees would like to thank everyone who has contributed to the Forum's activities during the year for their support, including the Charity's workforce, volunteers, beneficiaries, funders and donors.

	2023	2022
	£	£
Income during the year was:	1,433,108	1,544,580
Of which related to restricted project activities:	1,310,117	1,433,290
Total expenditure during the year was:	1,444,809	1,076,395
Of which was from restricted funds:	1,371,046	1,019,397
Of which was from unrestricted funds:	73,763	56,998
Net expenditure (2023) / net income (2022) for the year:	(11,701)	468,185
Net income relating to unrestricted activities:	49,228	54,292
Net expenditure (2023) / net income (2022) relating to restricted funds:	(60,929)	413,893

Income for the year was down by £111,472 on last year and expenditure increased by £368,414. This is due to increased delivery activity during the year, in the aftermath of the pandemic, expenditure in the year relating to grant funds received during 2021/22, inflationary pressures and cost of living support for staff.

Income levels have been consistent during the year. Trustees are assured and satisfied that the organisation is a going concern for the next 12 months and has financial resilience for the foreseeable future.

The cash balance held, as per the balance sheet, includes income deferred into 2023/24 for activities that will take place during that year. In addition, reserves are held for future activities.

	2023	2022
	£	£
<b>Reserves at 31st March 2023:</b>	1,253,538	1,265,239
<b>Consisting of restricted funds of:</b>	905,921	966,850
<b>And unrestricted funds of:</b>	347,617	298,389
<b>Of which are determined by the Trustees as designated reserves for specific purposes:</b>	63,020	56,750

## Contingent Liability

The charity has an ongoing legal case, which the Trustees expect to be covered by insurance. As the existence and value of any potential liability cannot be reliably estimated, it has not been included as a liability in the financial statements but is disclosed as a contingent liability.

## Fundraising Activities

The Forum does not actively undertake any direct fundraising activities and does not engage anyone to undertake such activities on its behalf.

# Financial and Management Policies

## Reserves Policy

Trustees are aware of the need to retain funding for future endeavours and developments, in order to meet the needs of the Charity's beneficiaries. Trustees review the level of reserves required on a regular basis, to ensure that they are adequate to fulfil the Charity's continuing obligations and in line with the Charity's Reserves Policy and objectives.

The Charity regularly reviews its Reserves Policy to ensure that it is achieving the appropriate balance between the need to serve beneficiaries as quickly as possible and the need to manage risks appropriately. In doing so, the Charity considers sector guidance for charities to hold reserves for the purpose of protecting the continuity of the Charity's work, providing funds needed for the development of the Charity, or providing funds needed to replace assets. It is the policy of the Charity that reserves should provide adequate financial stability and means for the Charity to meet its charitable objectives for the foreseeable future.

The Reserves Policy and the designations made within the reserves are key tools in monitoring and maintaining sufficient cash flows. The Trustees deem it necessary to have the security of reserves to maintain and develop activities with confidence, particularly where there may be timing delays with funding streams and to build resilience in the event of unforeseen difficulties. The determination of an appropriate reserves level is a key part of the strategic planning process and is linked to risk assessment of key areas of income and expenditure, along with future strategic development.

Trustees review the allocation of the Charity's reserves and make specific designations where applicable. Restricted funds are funds required to be used for a specific purpose. Free reserves represent unrestricted funds of the Charity excluding restricted and designated funds. The Trustees aim to hold sufficient free reserves to ensure financial sustainability, operational continuity to meet the needs of beneficiaries in the event of unforeseen situations and future strategic development.

The Trustees have reviewed the Reserves Policy during the year. Trustees consider it prudent to set aside an amount equivalent to between three and twelve months of anticipated annual running costs. For the coming year, based on 2022/23 figures, this range would be between £114,321 and £457,285. As at 31 March 2023, unrestricted reserves stood at £347,617 (2022: £298,389) less £749 (2022: £2,257) held as fixed assets and £63,020 (2022: £56,750) designated reserves leaving £283,848 (2022: £239,382) of free reserves which is within the range of the Reserves Policy.

These reserves would enable the Charity to continue to operate in the short term in the event of income shortfall and while action is being taken to replace funding or to implement required changes. Trustees are mindful of the long-term impact of the pandemic and are taking active steps to increase the level of free reserves over the next two years to build resilience and the longer-term sustainability and stability of the Charity.



# Investment Powers

The Constitution authorises the Trustees to use all money raised to further its Objects and to do all things that are lawful and conducive to the attainment of those Objects and does not prevent investment.

# Cash Management and Investment Policy

Management of cash reserves is governed by the Cash Management and Investment Policy, which establishes the Charity's investment objectives (in order of priority) as:

- (1) Capital preservation;
- (2) Liquidity; and
- (3) Income generation.

The Policy prohibits investment in instruments which do not guarantee principal repayment and controls credit risk, with bank counterparty limits approved by the Finance and Audit Committee.

Liquidity is ensured by specifying a minimum balance to be retained in instant access bank accounts, with a complementary limit on the average term or notice period for other deposits. Within these parameters, the Finance Team has delegated authority to manage the Charity's current and deposit accounts to maximise interest income, as far as consistent with limiting operational risk. This means that sufficient funds are available at any one time to ensure that the Charity can meet all its liabilities.

The Cash Management and Investment Policy is approved by the Board annually and monitored on a quarterly basis by the Finance and Audit Committee.

# Risk Management

The Trustees acknowledge their responsibility to give due consideration to the risks to which the Charity is exposed and have put in place processes to identify and manage risks through Risk Registers. Risks are regularly reviewed, assessed, managed and escalated appropriately in accordance with the Risk Management Policy.

The Trustees have given due consideration to the major risks to which the Charity is exposed and are satisfied that systems, processes and procedures are established in order to manage these risks. Risk management processes are in place and continue to be developed as required throughout the organisation. The Forum is committed to the continuous improvement of practices and procedures, including identifying improvements to risk management processes. These include regular review of internal control systems, which enable the Senior Leadership Team and Trustees to identify, manage and satisfactorily control risk exposures.

The Board regularly reviews organisational and strategic priorities, associated risks and mitigating factors. During the year, the Board has considered the risk of loss of funds through situations such as cyber-crime, fraud, global banking crisis or inflation and this has been a key area of focus for the Finance and Audit Committee.

The top three risks to the charity in the year ahead are:

- Increased cost of living for beneficiaries, including the Forum workforce, leading to rise in demand and additional pressure on the charity's resources.
- Continual change and financial pressures within the health and social care system, resulting in increased level of risk within the Forum's operating environment.
- Structural and cultural change within the Dorset Integrated Care System, leading to complexity in the Forum's strategic and operational context.

Work to strengthen governance mechanisms has continued during the year and internal audit has been further developed, building on the continuous improvement and development of the Charity's controls and procedures. Board committees provide scrutiny and information for the Board, supported by voluntary Governance Partners who work alongside Trustees, adding valuable capacity to the Charity's governance processes and activities.

# Structure, Governance and Management

## Governing Document and Constitution

Dorset Mental Health Forum is a registered Charitable Incorporated Organisation (CIO) in England and Wales, Charity number 1169215. The CIO's principal office is 29/29A Durngate Street, Dorchester, Dorset, DT1 1JP. It is governed by its Constitution which was originally adopted on 16 September 2016 when the CIO was first established. The Dorset Mental Health Forum, Charity number 1073818, transferred all assets, liabilities, activities, staff and undertakings to the new Dorset Mental Health Forum CIO on 31st March 2017.

The Forum Charity is governed by its Constitution and the Objects of the CIO are:

To promote and protect mental health for the public benefit, including but not exclusively by:

- a. Supporting the Recovery of people experiencing mental distress, by creating opportunities for people to reconnect with their own strengths and resources, in order to build the lives they wish to live.
- b. Challenging discrimination against people experiencing or affected by mental distress by modelling the value of lived experience expertise, including representation and involvement in the improvement and shaping of mental health services.
- c. Advancing the education and understanding of the general public in all areas relating to mental health by promoting the principles of mental health, Wellbeing and Recovery through Coproduction and Recovery Education.
- d. Developing the skills, capacity and opportunities to build socially inclusive, equitable and reciprocal communities which actively support good mental health.

## Public Benefit

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and Coproduction.

The Trustees have paid due regard to the Charity Commission's guidance on public benefit in deciding the activities undertaken by the Charity during the year. The Trustees are satisfied that the information provided in the Trustees' report and accounts meets the public benefit reporting requirements.

Trustees understand the difference made to the lives of the Charity's beneficiaries, as well as to society for public benefit. The Forum's beneficial purpose and activities are as stated above. The Forum's workforce models, facilitates and provides hope, opportunity and understanding around mental health throughout all of its projects and activities. This has enormous impact for people who experience mental illness and who have direct contact with any of the Forum's workforce and operational activities, as direct beneficiaries. In addition to this direct benefit, the Forum's activities also raise awareness, challenge stigma, influence culture and change behaviour within individuals, organisations, local communities and service systems, for public benefit in Dorset and beyond.

## Recruitment and Appointment of Trustees

Appointment of Board members (“Trustees” for Charity legislation purposes) is governed by the Constitution of the Charity.

Trustees are appointed, and reappointed, by the Members of the Charity at the AGM. New Trustees may also be appointed between AGMs by the existing Trustees but must retire and be reappointed by the Members at the subsequent AGM. The Board reviews its composition and performance regularly to ensure the appropriate balance of skills, experience, backgrounds and knowledge.

We undertook Trustee Recruitment activities during the year and are delighted to welcome new Trustees. The following people were Trustees of the Charity during the year:

- Ann Abraham (Chair)
- Chris Balfe
- Alison Chorley (Appointed November 2022)
- Rosanna Dean (Retired November 2022)
- Sorrelle Ford (Appointed November 2022)
- Tim Harry (Appointed November 2022)
- Peter Lovibond
- Arthur Merchant
- Sarah Murray
- Davide Rodrigues

None of the Trustees has any beneficial interest in the Charity.

The Forum’s Board of Trustees is responsible for the overall governance and strategic direction of the Charity. The Chief Executive is accountable to the Forum’s Board of Trustees. During the year, all Trustee and Board activities were able to be carried out either in person or virtually, with minimal disruption to business.

## Induction and Training of Trustees

New Trustees undergo an induction period in which they become familiar with the activities of the Charity, its core values, and its governance structure and processes, with support and mentoring as required. Once appointed, new Trustees keep themselves apprised of any new guidance issued by the Charity Commission and other relevant agencies. A Governance Handbook, compiled in 2021-22 is accessible to all Trustees through a shared digital space, as part of ongoing digital transformation work.

During the year, we have continued to review and strengthen the Charity’s governance structure. Trustees meet quarterly for Board meetings to discuss the business and governance of the organisation. This includes developing strategy, risk management and reviewing operational and financial information for the Charity. The Finance and Audit Committee and the Appointments and Remuneration Committee meet quarterly during the year, feeding directly into Board meetings as part of a programmed Board cycle for the year. Both Committees undertake an annual review of performance in relation to Terms of Reference, providing assurance to the Board.

Trustees are included and encouraged to participate in whole team building events and Forum activities, as well as to undertake training and attend Recovery Education Centre courses. The Forum provides full indemnity insurance for its Trustees.

# Structure, Governance and Management

## Board Development

Development work is ongoing with the Forum Board to build resilience and longer-term sustainability for the organisation. Diversity of experience and perspective and the required skill set of the Board is reviewed regularly. The Charity considers review, appraisal and development of the Board and its effectiveness, to be important processes and utilises sector resources to undertake these activities and inform performance and appropriate governance. These include the updated Charity Governance Code (2020) and the related NCVO Governance Wheel Toolkit (2021). The Board has regular Away Days to spend specific time on learning and development for Trustees, Board development and strategic review and planning.

## Policies

The Forum is committed to the continuous improvement of practices, policies and procedures and continues to review and update these as required and on an ongoing basis. Trustees have reviewed the Policy Framework during the year and continue to refresh key policies, which this year included Investment and Cash Management. Further review and development of policies and the Policy Framework is taking place during 2023-2024.

The Charity is continuing to work through the NCVO Trusted Charity Quality Standards, with a view to seeking external assessment.



Alison Chorley



Tim Harry



Sorrelle Ford

# Statement of Trustees' Responsibilities

**The Trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).**

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the income and expenditure of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgments and accounting estimates that are reasonable and prudent;
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the constitution. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the trustees are aware:

- There is no relevant audit information of which the Charity's auditors are unaware; and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



**Ann Abraham**  
Chair

**25 July 2023**

# Independent Auditor's Report

## to the Trustees of Dorset Mental Health Forum

### Opinion

We have audited the financial statements of Dorset Mental Health Forum (the 'Charitable incorporated organisation') for the year ended 31 March 2023 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cashflows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the Charity's affairs as at 31 March 2023 and of its income and expenditure for the year then ended;
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- Have been prepared in accordance with the requirements of the Charities Act 2011.

A C Mole is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006.

### Basis of opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

### Conclusions relating to going concern

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the society's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

### Other information

The Trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

# Independent Auditor's Report

## to the Trustees of Dorset Mental Health Forum

### Matters on which we are required to report by exception

In light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- The information given in the trustees' report is inconsistent in any material respect with the financial statements; or
- Sufficient accounting records have not been kept; or
- The financial statements are not in agreement with the accounting records; or
- We have not received all the information and explanations we require for the purposes of our audit.

### Responsibilities of the Trustees

As explained more fully in the Trustees' responsibilities statement, the Trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

### Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 144/145 of the Charities Act 2011 and report in accordance with the regulations made under section 145 of that Act.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed on the next page.

# Independent Auditor's Report

## to the Trustees of Dorset Mental Health Forum

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- The legal and regulatory framework in which the Charity operates
- The nature of the sector in which the Charity operates
- The control environment and controls established to mitigate such risks
- The results of our enquiries of management about their identification and assessment of risks of irregularities
- Discussions with the audit engagement team about where fraud might occur
- The incentives for fraud.

Laws and regulations which are considered to be significant to the Charity include those relating to the requirements of financial reporting framework FRS102, the Charities Act 2011, UK tax legislation, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the Charity.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

## Audit responses to risks identified

We undertook audit procedures to respond to the risks identified, and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- Gaining an understanding of the Charity's procedures for ensuring compliance with laws and regulations
- Testing the appropriateness of journal entries and other adjustments

- Considering whether accounting estimates were indicative of potential bias
- Considering whether any transactions arose outside the normal course of business
- Making enquiries of management
- Corroborating our enquiries through review of Board Minutes and correspondence.

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditor's report.

## Use of our report

This report is made solely to the Charity's Trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

**A C Mole (Statutory Auditor)**  
**Chartered Accountants and Statutory Auditors**  
**Stafford House**  
**Blackbrook Park Avenue**  
**Taunton, Somerset TA1 2PX**

**ACMOLE**

**3 November 2023**

# Statement of Financial Activities

For the year ended 31 March 2023

	Notes	Unrestricted Funds	Restricted Funds	Total Funds 2023	Unrestricted Funds	Restricted Funds	Total Funds 2022
		£	£	£	£	£	£
<b>Income:</b>							
Donations and legacies	2	8,087	-	8,087	2,305	-	2,305
Charitable activities	3	101,134	1,310,117	1,411,251	107,107	1,433,290	1,540,397
Investment income		12,534	-	12,534	-	-	-
Other		1,236	-	1,236	1,878	-	1,878
<b>Total income</b>		<b>122,991</b>	<b>1,310,117</b>	<b>1,433,108</b>	<b>111,290</b>	<b>1,433,290</b>	<b>1,544,580</b>
<b>Expenditure</b>							
Charitable activities	4	73,763	1,371,046	1,444,809	56,998	1,019,397	1,076,395
<b>Total expenditure</b>		<b>73,763</b>	<b>1,371,046</b>	<b>1,444,809</b>	<b>56,998</b>	<b>1,019,397</b>	<b>1,076,395</b>
<b>Net (expenditure)/ income before transfers</b>		<b>49,228</b>	<b>(60,929)</b>	<b>(11,701)</b>	<b>54,292</b>	<b>413,893</b>	<b>468,185</b>
<b>Net movement in funds</b>		<b>49,228</b>	<b>(60,929)</b>	<b>(11,701)</b>	<b>54,292</b>	<b>413,893</b>	<b>468,185</b>
<b>Reconciliation of funds</b>							
<b>Total funds brought forward</b>		<b>298,389</b>	<b>966,850</b>	<b>1,265,239</b>	<b>244,097</b>	<b>552,957</b>	<b>797,054</b>
<b>Total funds carried forward</b>		<b>347,617</b>	<b>905,921</b>	<b>1,253,538</b>	<b>298,389</b>	<b>966,850</b>	<b>1,265,239</b>

# Balance Sheet

As at 31 March 2023

	Notes	2023		2022	
		£	£	£	£
<b>Fixed assets</b>					
Tangible assets	9		749		2,257
<b>Current assets</b>					
Debtors	10		22,881		343,983
Cash at bank and in hand			1,606,611		1,305,246
			<b>1,629,492</b>		<b>1,649,229</b>
<b>Creditors</b>					
Amounts falling due within one year	11	<b>376,703</b>		<b>386,247</b>	
<b>Net current assets</b>					
			<b>1,252,789</b>		<b>1,262,982</b>
<b>Total assets less current liabilities</b>					
			<b>1,253,538</b>		<b>1,265,239</b>
<b>Net assets</b>					
			<b>1,253,538</b>		<b>1,265,239</b>
<b>The funds of the Charity</b>					
<b>Unrestricted funds</b>					
General funds	15		284,597		241,639
Designated funds	15		63,020		56,750
			<b>347,617</b>		<b>298,389</b>
<b>Restricted funds</b>					
	15		<b>905,921</b>		<b>966,850</b>
<b>Total Charity funds</b>					
			<b>1,253,538</b>		<b>1,265,239</b>

Approved by the Board of Trustees for issue on 25 July 2023 and signed on their behalf by:



**Ann Abraham**  
Chair

# Statement of Cashflows

For the year ended 31 March 2023

	Notes	2023		2022	
		£	£	£	£
<b>Cashflows from operating activities</b>					
Net cash provided by operating activities	13		288,831		168,140
<b>Cashflows from investing activities</b>					
Interest from investment		12,534		1,878	
Net cash provided by investing activities			12,534		1,878
Change in cash and cash equivalents in the reporting period			301,365		170,018
Cash and cash equivalents at the beginning of the reporting period			1,305,246		1,135,228
<b>Cash and cash equivalents at the end of the reporting period</b>			<b>1,606,611</b>		<b>1,305,246</b>

# Notes to the Financial Statements

For the year ended 31 March 2023

## 1. Accounting Policies

### 1.1 General information

Dorset Mental Health Forum is a Charitable Incorporated Organisation governed by its Constitution. The address of the principal office is given on page 55. The nature of the Charity's operations and its principal activities are set out in the Trustees' report on pages 3–37.

### Basis of accounting and assessment of going concern

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (issued October 2019) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102) and the Charities Act 2011.

The Charity meets the definition of a public benefit entity under FRS 102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

### 1.2 Income recognition

All income is included in the statement of financial activities when the Charity is entitled to the income, it is probable the income will be received and the amount can be measured reliably. The following specific policies are applied to particular categories of income.

Donations and gifts are recognised in the Statement of Financial Activities when receivable. Legacy income is recognised in the financial statements in the period that it has been received or where there is sufficient evidence that it is probable that the legacy will be received.

Income from grants and contracts, relating to charitable activities are recognised in the Statement of Financial Activities when receivable. If there is a Service Level Agreement or Contract in place income is taken into account in the period to which it relates. Where grants and contract income received have conditions or restrictions as to their use attached the income is recognised as restricted income funds. Where no such conditions or restrictions exist, grants and contract income received are recognised as unrestricted income.

Investment income in respect of funds held on deposit is included when receivable and the amount can be measured reliably. This is normally upon notification of the interest paid by the bank.

Other income is recognised in the Statement of Financial Activities when receivable; this relates largely to the reimbursement of expenditure.

### 1.3 Donated services

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

### 1.4 Expenditure recognition

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably. All expenditure is accounted for on an accruals basis. All expenses, including support costs and governance costs, are allocated or apportioned to the applicable expenditure headings in the statement of financial activities.

Charitable expenditure comprises those costs incurred by the Charity in the delivery of its charitable activities and services. It includes both costs that can be allocated directly to such activities and costs of an indirect nature which are necessary to support them. Those support costs of an indirect nature include the resources of senior management, personnel, HR, IT, premises, finance and governance which are apportioned on a basis consistent with the use of resources largely by reference to time spent although alternative methods of apportionment may be used where they produce a more equitable result. Details of apportionment of support costs are shown in note 5.

## 1.5 Pension costs

The Charity operates workplace pension schemes for its qualifying employees. The schemes used are the government established National Employment Savings Trust (NEST) and Standard Life Stakeholder Scheme. Both schemes are defined contribution schemes and the amount included in the Statement of Financial Activities represents the contributions payable to the scheme in respect of the accounting period.

## 1.6 Operating leases

Leases in which substantially all the risks and rewards of ownership are retained by the lessor are classified as operating leases. Rentals payable under operating leases are charged to the Statement of Financial Activities over the term of the lease. The Charity has operating leases for the premises from which it operates. The title of the leased premises remains with the lessor.

## 1.7 Fixed assets

Where fixed assets are purchased they are stated at their purchase cost plus any incidental expenses of acquisition. Where fixed assets are donated, they are stated at their estimated market value on acquisition. Depreciation is charged in respect of fixed assets and is calculated so as to write off the cost of the assets, less any estimated residual value, over their expected useful economic useful lives as follows:

Office equipment and furniture - 25% straight line.

## 1.8 Cash and cash equivalents

Cash and cash equivalents includes cash in hand and other short term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

## 1.9 Taxation

Dorset Mental Health Forum is a registered charity and is therefore not liable to taxation to the extent that its income and gains are applicable to charitable purposes only. Value added tax is not recoverable and is therefore included in the relevant costs in the Statement of Financial Activities.

## 1.10 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Board in furtherance of general objectives of the Charity, and which have not been designated for other purposes.

Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

Restricted funds are to be used for specific purposes as laid down by the donor. Expenditure which meets this criterion is charged to the fund, together with fair allocation of management and support costs as appropriate.

## 1.11 Financial instruments

The Charity only has financial assets and liabilities that qualify as basic financial instruments including trade and other debtors, cash and bank balances and trade and other payables. Basic financial instruments are initially recognised at transaction price and subsequently at amortised cost.

## 1.12 Critical accounting estimates and judgements

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

The Trustees are of the opinion that there are no estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

## 2. Income from donations and legacies

	Unrestricted Funds	Restricted Funds	Total Funds 2023	Unrestricted Funds	Restricted Funds	Total Funds 2022
	£	£	£	£	£	£
Donations and gifts	8,087	-	8,087	2,305	-	2,305
	<b>8,087</b>	<b>-</b>	<b>8,087</b>	<b>2,305</b>	<b>-</b>	<b>2,305</b>

### 3. Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds 2023	Unrestricted Funds	Restricted Funds	Total Funds 2022
	£	£	£	£	£	£
<b>Advocacy Services</b>						
Dorset Council	-	66,596	66,596	-	66,596	66,596
Dorset Healthcare	-	7,565	7,565	-	7,563	7,563
BCP Council	-	99,898	99,898	-	99,898	99,898
<b>Lived Experience Infrastructure</b>						
Dorset HealthCare	84,259	-	84,259	84,259	-	84,259
NHS Dorset ICB	10,000	-	10,000	10,000	-	10,000
BCP Council	5,000	-	5,000	5,000	-	5,000
<b>National Lottery Community Fund</b>	-	-	-	-	95,500	95,500
<b>Talbot Village Trust</b>	-	-	-	-	99,696	99,696
<b>Recovery Education Centre (REC)</b>	-	33,800	33,800	-	33,800	33,800
<b>Dorset Wellbeing and Recovery Partnership</b>						
Dorset HealthCare	-	755,995	755,995	-	820,053	820,053
DMH Carers Project Income	-	3,000	3,000	-	3,000	3,000
<b>Employment Service</b>	-	125,000	125,000	-	125,000	125,000
<b>Sports and Social Programme</b>	-	4,013	4,013	1,963	1,480	3,443
<b>SMI Physical Health</b>	-	20,328	20,328	-	25,392	25,392
<b>Dorset Open Door</b>	-	69,718	69,718	-	41,056	41,056
<b>Suicide Prevention</b>	-	22,244	22,244	-	14,256	14,256
<b>Health Education England</b>	-	101,960	101,960	-	-	-
<b>Social Enterprise</b>	1,875	-	1,875	3,670	-	3,670
<b>Other</b>	-	-	-	2,215	-	2,215
	<b>101,134</b>	<b>1,310,117</b>	<b>1,411,251</b>	<b>107,107</b>	<b>1,433,290</b>	<b>1,540,397</b>

## 4. Expenditure on charitable activities

	Activities undertaken directly	Support Costs	Total 2023	Activities undertaken directly	Support Costs	Total 2022
	£	£	£	£	£	£
Advocacy	129,448	41,417	170,865	100,068	32,400	132,468
WaRP Projects	609,802	178,451	788,253	586,432	177,156	763,588
WaRP Core	52,184	-	52,184	48,748	-	48,748
Sports and Social	4,013	-	4,013	-	-	-
National Lottery Community Fund	64,375	17,201	81,576	92,982	25,100	118,082
DMH Carers Project	804	-	804	1,095	-	1,095
NHS Dorset ICB	169,652	35,370	205,022	-	-	-
Lloyds Bank	-	-	-	-	4,164	4,164
Charity Development	14,400	-	14,400	3,600	-	3,600
Digital Development	5,199	-	5,199	4,650	-	4,650
Talbot Village Trust	54,434	19,879	74,313	-	-	-
Health Education England	46,200	-	46,200	-	-	-
Evaluation Activities	1,980	-	1,980	-	-	-
	<b>1,152,491</b>	<b>292,318</b>	<b>1,444,809</b>	<b>837,575</b>	<b>238,820</b>	<b>1,076,395</b>

## 5. Analysis of support costs

	Advocacy	WaRP Projects	National Lottery	Talbot Village Trust	Primary Care Networks	SMI	Total
	£	£	£	£			£
<b>Central Services</b>							
HR	6,684	30,364	2,930	2,907	3,212	2,926	49,023
Finance	6,983	31,984	1,994	4,161	3,392	2,953	51,467
IT	7,941	36,908	3,371	3,852	3,680	3,354	59,106
CEO	7,338	33,720	3,064	3,534	3,366	3,064	54,086
Director of Operations	2,343	10,920	919	1,154	1,087	985	17,408
<b>Premises &amp; Office</b>	2,122	9,927	998	921	958	890	15,816
<b>Governance &amp; Strategic Costs</b>	4,611	8,755	1,946	2,198	1,412	1,228	20,150
<b>PR &amp; Marketing</b>	3,395	15,873	1,979	1,152	1,455	1,408	25,262
	<b>41,417</b>	<b>178,451</b>	<b>17,201</b>	<b>19,879</b>	<b>18,562</b>	<b>16,808</b>	<b>292,318</b>

Support costs have been apportioned based on actual delivery hours.

### Notes to the Financial Statements - For the year ended 31 March 2023

## 6. Auditor's remuneration

	2023	2022
	£	£
<b>Audit fee</b>	6,382	5,570
<b>Accountancy fees</b>	4,580	4,630
<b>Payroll services</b>	4,292	4,375
<b>Other services</b>	7,745	4,530
	<b>22,999</b>	<b>19,105</b>

## 7. Trustees expenses and remuneration

No remuneration has been paid to or on behalf of the Trustees (2022: Nil).

No expenses reimbursed to Trustees during the year (2022: Nil).

## 8. Employees and employment costs

	2023	2022
	£	£
<b>Wages and salaries</b>	946,180	766,466
<b>Social security costs</b>	69,442	51,062
<b>Pension costs</b>	30,834	17,219
	<b>1,046,456</b>	<b>834,747</b>

No individual employee was paid over £60,000 (2022: none).

The average monthly headcount (number of staff employed) during the year was:

	2023	2022
	People	People
<b>All Staff</b>	76	77

The full time equivalent number of staff employed during the year was:

	2023	2022
	No	No
<b>All Staff</b>	39	30

The key management personnel of the Charity are considered to be the Chief Executive Officer, Director of Operations. The total employee benefits for key management personnel were £109,703 (2022: £103,828).

The Charity operates defined contribution pension schemes. The pension cost charged to the Statement of Financial Activities for the period represents contributions payable by the Charity to the schemes and amounted to £30,834 (2022: £17,219).

Volunteers contribute unpaid time to the services provided by the Charity. The estimated volunteer time for the period amounted to approximately 3,650 hours (2022: 3,500 hours), totalling an estimated £62,050 (2022: £56,000), which has not been reflected in the Statement of Financial Activities in accordance with the Charities SORP (FRS 102).

### Notes to the Financial Statements - For the year ended 31 March 2023

## 9. Tangible fixed assets

	Office Equipment & Furniture	Total
	£	£
<b>Cost</b>		
As at 01.04.22	6,032	6,032
Additions	-	-
<b>As at 31.03.23</b>	<b>6,032</b>	<b>6,032</b>
<b>Depreciation</b>		
As at 01.04.22	3,775	3,775
Charge for year	1,508	1,508
<b>As at 31.03.23</b>	<b>5,283</b>	<b>5,283</b>
<b>Net book value</b>		
<b>As at 31.03.23</b>	<b>749</b>	<b>749</b>
<b>As at 31.03.22</b>	<b>2,257</b>	<b>2,257</b>

## 10. Debtors

	2023	2022
	£	£
Debtors	18,725	312,031
Accrued Income	-	31,952
Prepayments	4,156	-
	<b>22,881</b>	<b>343,983</b>

## 11. Creditors: Amounts falling due within one year

	2023	2022
	£	£
Creditors	8,776	1,231
Accruals and deferred income	365,144	367,324
Other tax & social security	-	15,856
Other creditors	2,783	1,836
	<b>376,703</b>	<b>386,247</b>

## 12. Related party transactions

There were no related party transactions during the year. (2022: None.)

Remuneration paid to key management personnel is disclosed in note 8.

## 13. Reconciliation of net (expenditure)/income to net cashflow from operating activities

	2023	2022
	£	£
<b>Net (expenditure)/ income for the period as per the Statement of Financial Activities</b>	(11,701)	468,185
Adjustments for:		
Depreciation charges	1,508	1,508
Decrease/(increase) in debtors	321,102	(171,264)
(Decrease) in creditors	(9,544)	(128,411)
Interest from investments	(12,534)	(1,878)
<b>Net cash generated from operating activities</b>	<b>288,831</b>	<b>168,140</b>

## 14. Operating lease

Dorset Mental Health Forum is due to pay the following future minimum lease payments under non-cancellable operating leases for which it is leasing, for each of the following periods:

	2023	2022
	£	£
<b>Payments</b>		
Within one year	1,181	1,181
Due in two to five years	2,656	3,837
	<b>3,837</b>	<b>5,018</b>

## 15. Statement of funds

	Balance 01.04.22	Income	Expenditure	Transfer	Balance 31.03.23
	£	£	£	£	£
<b>Unrestricted funds</b>					
General funds	241,639	122,991	(52,184)	(27,849)	284,597
<b>Designated funds</b>					
Charity development	21,400	-	(14,400)	18,000	25,000
Digital development	10,350	-	(5,199)	9,849	15,000
Evaluation activities	25,000	-	(1,980)	-	23,020
<b>Total Unrestricted funds</b>	<b>298,389</b>	<b>122,991</b>	<b>(73,763)</b>	<b>-</b>	<b>347,617</b>
<b>Restricted funds</b>					
Advocacy	69,050	174,059	(170,865)	-	72,244
Employment	39,775	-	-	-	39,775
Community development	64,630	-	-	-	64,630
WaRP	603,604	789,016	(788,253)	55,760	660,127
DMH Carers Project	5,193	3,000	(804)	-	7,389
Sports and Social	3,326	4,013	(4,013)	-	3,326
National Lottery	81,576	-	(81,576)	-	-
Talbot Village Trust	99,696	-	(74,313)	-	25,383
NHS Dorset ICB	-	238,069	(205,022)	-	33,047
Health Education England	-	101,960	(46,200)	(55,760)	-
<b>Total Restricted funds</b>	<b>966,850</b>	<b>1,310,117</b>	<b>(1,371,046)</b>	<b>-</b>	<b>905,921</b>
<b>Total funds</b>	<b>1,265,239</b>	<b>1,433,108</b>	<b>(1,444,809)</b>	<b>-</b>	<b>1,253,538</b>

### Restricted Funds

- Funding for Advocacy for people experiencing mental health problems in Dorset has been made available from a range of sources, including Dorset County Council, Bournemouth Borough Council, BCP Council and Dorset HealthCare University NHS Foundation Trust (DHC).
- Employment funds are held to provide employment related activities to individuals and local employers in Dorset.
- Community development funds (previously named Social Inclusion) are held for projects to be started in the future.

### Notes to the Financial Statements - For the year ended 31 March 2023

## 15. Statement of funds (continued)

- The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised partnership between Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust which puts lived experience expertise at the heart of service design and delivery, to transform services and affect culture change. Funding supported over 30 different partnership projects and workstreams during the year. The Recovery Education Centre (REC), Dorset Work Matters, the Discovery Project and the Retreats were four of these projects. Health Education England provided core funding to support staff undertaking Peer Support Worker training.
- Funds received and administered for the independent Dorset Mental Health Carers Project, supported by the Dorset Mental Health Forum.
- Active Dorset funds are held for the set up and delivery of DMHF Climbing Satellite Club as part of the Forum's Sports and Social Programme.
- National Lottery Community Fund grant funds have enabled influencing and culture change activities around mental health in Dorset, building capacity within communities.
- Talbot Village Trust grant funds have enabled lived experience outreach activities and Recovery Education in local communities across Southeast Dorset.
- NHS Dorset ICB funds received for lived experience expertise to support integration across number of workstreams.
- Health Education England funds received for lived experience workforce development. Health Education England provided core funding to support staff undertaking Peer Support Worker training.

### Designated Funds

- Designated Charity development funds are held for the specific purpose of meeting expenditure directly related to the development of the Charity.
- Designated Digital development funds are held for the specific purpose of meeting expenditure directly related to digital transformation work within the Charity.
- Designated Evaluation activities funds are held for the specific purpose of meeting expenditure directly related to evaluation activities within the Charity.

## 16. Analysis of net assets between funds

	Unrestricted Funds	Restricted Funds	Total Funds 2023	Unrestricted Funds	Restricted Funds	Total Funds 2022
	£	£	£	£	£	£
Tangible fixed assets	749	-	749	2,257	-	2,257
Current assets	369,389	1,260,103	1,629,492	332,648	1,316,581	1,649,229
Creditors due within one year	(22,521)	(354,182)	(376,703)	(36,516)	(349,731)	(386,247)
	<b>347,617</b>	<b>905,921</b>	<b>1,253,538</b>	<b>298,389</b>	<b>966,850</b>	<b>1,265,239</b>

## 17. Contingent liability

The charity has an ongoing legal case, which the Trustees expect to be covered by insurance. As the existence and value of any potential liability cannot be reliably estimated, it has not been included as a liability in the financial statements but is disclosed as a contingent liability.

## 18. Statement of funds for the year ended 31 March 2022

	01.04.21	Income	Expenditure	Transfer	31.03.22
	£	£	£	£	£
<b>Unrestricted funds</b>					
General funds	179,097	111,290	(48,748)	-	241,639
<b>Designated funds</b>					
Charity Development	25,000	-	(3,600)	-	21,400
Digital Development	15,000	-	(4,650)	-	10,350
Evaluation activities	25,000	-	-	-	25,000
<b>Total unrestricted funds</b>	<b>244,097</b>	<b>111,290</b>	<b>(56,998)</b>	<b>-</b>	<b>298,389</b>
<b>Restricted funds</b>					
Advocacy	27,461	174,057	(132,468)	-	69,050
Employment	39,775	-	-	-	39,775
Community development	64,630	-	-	-	64,630
WaRP	307,635	1,059,557	(763,588)	-	603,604
Sports and Social	1,846	1,480	-	-	3,326
National Lottery	104,158	95,500	(118,082)	-	81,576
Talbot Village Trust	-	99,696	-	-	99,696
Lloyds Bank Foundation	4,164	-	(4,164)	-	-
DMH Carers Project income	3,288	3,000	(1,095)	-	5,193
<b>Total restricted funds</b>	<b>552,957</b>	<b>1,433,290</b>	<b>(1,019,397)</b>	<b>-</b>	<b>966,850</b>
<b>Total funds</b>	<b>797,054</b>	<b>1,544,580</b>	<b>(1,076,395)</b>	<b>-</b>	<b>1,265,239</b>

# Reference and Administrative Details

## Trustees

Ann Abraham (Chair)  
Chris Balfe  
Alison Chorley (Appointed November 2022)  
Rosanna Dean (Retired November 2022)  
Sorrelle Ford (Appointed November 2022)  
Tim Harry (Appointed November 2022)  
Peter Lovibond  
Arthur Merchant  
Sarah Murray  
Davide Rodrigues

## Chief Executive

Becky Aldridge

## Principal Office

Dorset Mental Health Forum  
29/29A Durngate Street  
Dorchester  
Dorset  
DT1 1JP

## Senior Statutory Auditor

Adam Knight FCA  
A C Mole  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX

## Principal Bankers

National Westminster Bank Plc  
Dorchester Branch  
49 South Street  
Dorchester  
Dorset  
DT1 1DW



**The collective voice of lived experience**

29A Durngate Street, Dorchester, Dorset DT1 1JP  
01305 257172

[www.dorsetmentalhealthforum.org.uk](http://www.dorsetmentalhealthforum.org.uk)

**DORSET MENTAL HEALTH FORUM**

England & Wales - Charity number 1169215

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# Accounts

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**DORSET  
MENTAL HEALTH  
FORUM**

Promoting wellbeing & recovery

## **ANNUAL REPORT & ACCOUNTS 2021-2022**



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# Welcome from our Chair & CEO



**Ann Abraham**  
Chair of the Trustee Board

The Trustees have pleasure in presenting their annual report and the financial statements for the year ended 31 March 2022. The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Constitution and the Charities Act 2011.

We introduce our Annual Report by first thanking and celebrating our inspirational workforce, who bring their own life and lived experiences every day to their work. We could not have achieved such impact for people in Dorset this year without the dedication, commitment and continued hard work of our whole workforce.

work and activities to meet and support people on their own terms, educating and enabling people, services and systems to celebrate and build on what is strong, in order to meet the challenges of today and those of the future. By supporting people and local organisations to share their voices, we have continued to build capacity within services and communities.



**Becky Aldridge**  
CEO

It continues to be a challenging time for people and communities throughout Dorset as everything around us has changed and is still changing. In the true spirit of Recovery... our experiences during the pandemic have changed us and *"there is no going back to how we were before that event. We have to incorporate that into our way of living and we learn from that and move on with that."*

Moving forward into 2022/23, we are excited to be building on this year's development of our eight Strategic Objectives, underpinned and supported by our People, Sustainability and Influencing strategies. We believe that our work will be even more relevant and vital in the year ahead and we remain deeply committed and passionate about driving social and cultural change in Dorset.

During 2021/22 we are very proud to have responded positively to the difficulties and struggles around us, evolving and structuring our

**Ann Abraham**  
Chair of the Trustee Board

**Becky Aldridge**  
CEO

# Strategic Report

## About Us

**The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and Coproduction.**

We believe that experiencing mental ill health and managing one's symptoms should not preclude or diminish a person's right to enjoy all of the opportunities that life can provide, as with managing any physical health condition. This is one of the aspirations that sits behind all our work, along with a passionate desire to challenge the stigma, prejudice and discrimination that still exists around people's experiences of mental health problems. We have contact with many people who do not want to be defined by their illness or diagnosis, despite managing serious

long-term conditions. Many people can lead meaningful and satisfying lives, others require more support to do so, often having been supported by services for most of their lives.

Recovery is at the heart of all that we do, enabling and promoting the value and efficacy of people doing for themselves what they have traditionally been reliant on services to provide, encouraging an environment where people work in partnership with providers of care and treatment, in order to build the lives they wish to live.





## Our Vision

A world that understands mental health: where individuals and communities can enjoy good mental health, shared humanity and appropriate support when they experience emotional distress and trauma.

## Our Mission

To increase understanding of mental health, to support people's Recovery and to build capacity within services and communities to bring about change.

We deliver our Mission through four Strategic Aims:

- Increase understanding of mental health through Recovery Education and Coproduction.
- Support and enable people to live the lives they wish to live.
- Develop capacity and build connected communities across Dorset.
- Influence and transform local services with the collective voice of lived experience expertise.

## Our Values

Guide everything that we do:

- Honesty is our foundation stone.
- Our work requires Courage, to be vulnerable and to grow.
- We know the power of Compassion.
- Respect for who we are is a human right.
- Having Integrity means living our values and staying true to our purpose.

## Our Beliefs

We believe:

- That people with lived experience of mental health problems have a wealth of specialist knowledge, valuable expertise and experiences.
- In the effectiveness of partnership working in the design and provision of services.
- That everyone has an equal right to enjoy all the opportunities that life provides.
- That there is 'no health without mental health' and that 'mental health is everyone's business'.
- That individuals and communities hold many of their own solutions.
- That hope, mental health and wellbeing are essential to us all.



# Activities and Objectives

## What we do

**We are a community of people who have experiences of mental distress and managing a mental health condition, experiences of trauma, living with long term health issues or caring for someone who is in emotional distress. Our lived experience infrastructure brings the collective voice of lived experience expertise to the heart of real and sustainable change across Dorset.**

Utilising our lived experience expertise, we influence and facilitate significant culture change around mental health in Dorset, as well as undertake a range of specialist independent and partnership activities to fulfil our mission and objectives, supporting individuals, communities and local systems to understand mental health. Intrinsic to this work is modelling Recovery, developing capacity and capability within individuals and communities.



## Sports and Social

Our Sports and Social Programme works with individuals and organisations to offer different activities across Dorset, developing connections and helping people to build a life within their local community.

## Advocacy

Our Dorset Mental Health Advocacy Service supports people to have a voice and exercise their rights in matters that directly affect their lives. This includes times when they may be subject to the Mental Health Act.

## Dorset Wellbeing and Recovery Partnership (WaRP)

The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised, formal partnership between the Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust, putting lived experience expertise hand in hand with professional and technical expertise. The Partnership promotes coproduction and drives culture change across the Integrated Care System in Dorset.

Together the Dorset Wellbeing and Recovery Partnership provides the following projects:

## **Dorset Recovery Education Centre**

Dorset Recovery Education Centre (REC) provides Recovery focused, educational opportunities that enable people to identify their strengths, find hope and build skills, to reframe their experiences of trauma and emotional distress.

## **Discovery Project**

Discovery Project works closely with schools and youth projects to facilitate participation and create mechanisms for young people to have a voice within local services and their communities.

## **Dorset Open Door**

Dorset Open Door is a collaborative, multi-agency bereavement support and signposting service for people in Dorset who have been bereaved by trauma or suicide.

## **Retreats**

Retreats provide a collaborative approach to crisis support in Dorset, through open access safe spaces for people to make sense of their distress in times of self-defined crisis.

## **Peer Specialists**

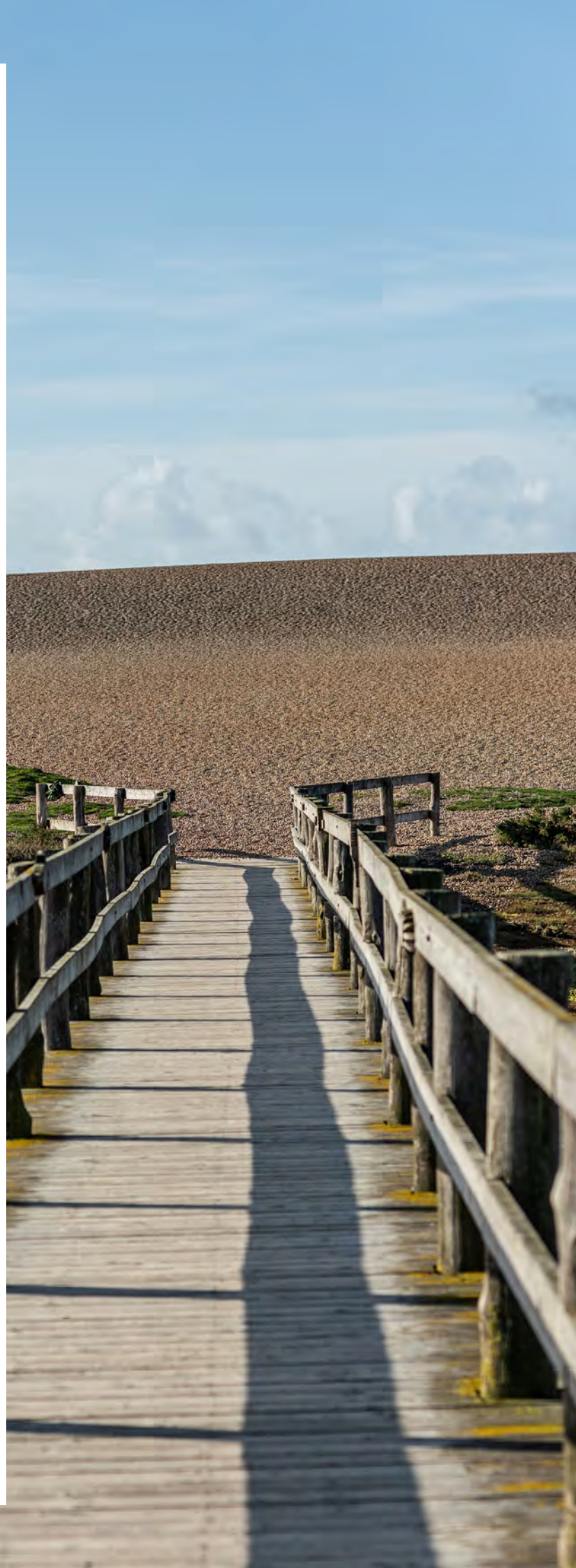
Peer Specialists within services are staff who intentionally utilise their lived experience of mental health issues, trauma, and emotional distress, to support Recovery oriented practices within local services and broader communities across Dorset.

## **Carers Project**

Carers Project supports the development of lived experience voices of carers, particularly people who have been bereaved by suicide or cared for people who have experienced complex trauma.

## **Dorset Work Matters**

Dorset Work Matters provides an Individual Placement and Support (IPS) employment service to people accessing secondary mental health services, as part of a broader ambition to create meaningful vocational opportunities for people in Dorset.



# Strategic Objectives for 2021-2024

**As 2021 was the final year of the Forum's 2018-2021 Strategy and in the wake of the Covid pandemic, we undertook engagement and development activities during the year to review and determine the Forum's Strategy for 2021-2024.**

Although our operating environment changed significantly as a result of the pandemic, it was evident that our vision of a world that understands mental health and our mission to increase understanding of mental health, to support people's Recovery and to build capacity within services and communities, are still very relevant and required by beneficiaries and stakeholders today.

Moreover, it became clear that our new Strategy needed to speak to deepening inequalities and social justice issues. We developed eight new Strategic Objectives (see following page) to strengthen our focus in these areas.



1

## Education

Broaden reach of Recovery Education, including Primary Care Networks, Department for Education, Public Health, building literacy around impact of trauma.

2

## Agency

Enable people to build their lives beyond services, through community activities, citizenship, learning and Recovery.

3

## Activism

Develop channels for grassroots activism, to enable people's voices to be heard, advocating for equality and social justice.

4

## System

Further develop WaRP as Dorset Integrated Care System (ICS) partner, supporting delivery of Prevention at Scale and Population Health agendas.

5

## Parity

Promote parity between physical and mental health, challenging health inequalities, through lived experience perspective.

6

## Connection

Develop diverse access and alternative options for people to understand and reframe their life and mental health experiences.

7

## Collaboration

Develop reciprocal collaborations within local communities to build capacity, add value and amplify people's voices.

8

## Employment

Pioneer development of peer employment pathways and opportunities across the Dorset System, building understanding and capability.

We are working within our Strategic Aims during 2021-2024 to make a difference for the people of Dorset within these eight Strategic Objective areas.

We have developed three supporting strategies to enable and support delivery of our Strategy 2021-24:

- **People Strategy** – Continuous learning, growth and development for our thriving workforce.
- **Sustainability Strategy** – Developing longer term financial and environmental sustainability.
- **Influencing Strategy** – Building our collective voice for influence and to bring about change.

# Achievements and Performance during 2021/22

## Lived Experience Infrastructure

**Our diverse lived experience infrastructure brings an alternative perspective around mental health to local services and communities, challenging stigma through lived experience expertise and coproduction. We have continued to evolve and strengthen our lived experience expertise and infrastructure, by creating opportunities and mechanisms for people to make sense of and reframe their experiences, utilising their learning to model Recovery, increase understanding, support others and influence change in Dorset.**

Our courageous and inspiring workforce promote and model the principles of Wellbeing and Recovery in a variety of different roles and settings throughout the organisation, local services and across Dorset. Our staff are employed in different roles across the organisation, with some people working as Peer Specialists and engaged in Partnership work. Employment is an intrinsic part of our people's own Recovery journeys, as they discover and develop skills and resilience to build the lives they wish to live, focusing on their strengths, rather than deficits, "what's strong, rather than what's wrong".

Maintaining a psychologically safe, values-based workplace and culture within our organisation is paramount for our work. Many of our workforce have experienced periods of crisis in their lives and the pandemic has seen our people demonstrate courage, tenacity and compassion within their work and in support of their colleagues. Developing capacity, resilience and sustainability across the organisation to support the workforce has been priority work throughout the year.

We have continued with our digital transformation workstreams during the year, learning together as a workforce and supporting each other and our beneficiaries with new ways of working. All of our teams have shown commitment, innovation and creative problem solving as we have delivered on projects and served so many of our beneficiaries during what continues to be a challenging time.

**"I've really appreciated the wellbeing support I've had and the development process I've begun. It's made me feel like I know what I want and the path I'm on to get there."**

*Staff member, 2021*

Gaining understanding and learning from the experiences of our workforce, through engagement mechanisms and regular staff surveys, continues to be paramount to inform further developments.

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We have had over

82

people in our workforce  
utilising their experiences

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We have provided

44,075

hours of lived experience  
expertise across Dorset

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# Strategic Objective: Education

**Broaden reach of Recovery Education, including Primary Care Networks, Department for Education, Public Health, building literacy around impact of trauma.**

**The focus this year as we move forward from the effects of the pandemic, has been to ensure consistency and accessibility for people across Dorset who wish to access Recovery Education and trauma informed educational workshops. This knowledge has enabled our beneficiaries to be more informed and therefore better equipped to understand what they might want for themselves in terms of building a life beyond mental health services. This is relevant for both people who access mental health services and staff who work within them.**

Our work has shown us that in order to collaborate effectively in planning for Recovery, people need to have some sense of their own strengths, resources and expertise. The Recovery Education Centre (REC) provides educational opportunities that enable people to reframe their experiences by bringing together the perspective of lived experience and that of clinical or technical expertise. During the year, people have accessed Recovery Education through online resources such as podcasts, videos and workbooks or through classroom learning, either webinars or face to face delivery.



In terms of social change, we believe more people talking about mental health concerns does indeed represent progress, but that **there is still a long way to go in order for people to understand the lasting impact of trauma on a person's mental health and wellbeing. Codeveloping and codelivering trauma informed Recovery Education for organisations and communities across Dorset during the year has enabled us to challenge stigma and broaden understanding and perspectives around mental health.**

- We offered **1,398** places on Recovery Education courses, including Early Warning Signs; Sleep; Managing Mood; Self Compassion and Understanding Unusual Experiences. Courses were offered as a mixture of face to face, webinars and enhanced webinars (with more discussion and interaction).
- We provided trauma informed training to **360** staff across the mental health system, using a Recovery Education approach to explore perspectives from both lived experience and technical points of view. Underpinning interactions in a trauma informed way ensures that the person has a voice and can describe what matters to them (strengths, values, identity), rather than be focusing on what is the matter or wrong with them (symptoms, diagnosis, deficit).
- We delivered **523** Recovery Skills workshops across inpatient and community settings. A person's Recovery journey is not linear and access to Recovery Education is important at all stages. Our Recovery Skills workshops are shorter and more informal, creating space for exploration and discussion, as well as reminders of the fundamental importance of self-care and compassion.

## Impact

**As a result of accessing Recovery Education, people tell us that they feel less alone in their struggle and more informed about what is possible in terms of Recovery. Staff tell us that they feel better equipped and more confident to hold space for people to find solutions for themselves.**

**"Hi, I want to thank the wonderful speakers on today's Recovery webinar. Their openness and lived examples were very relatable and helpful to me and left me with a feeling of hope :) tapping into various resources and keeping on fighting. Thanks again!"**

*REC Student*

**"Over the months you have been supporting me I feel like I have a chance at life again. I went from feeling hopeless and angry at the world to feeling optimistic and planning for the future. Without lived experience input I might not still be here."**

*Recovery Skills Workshop Student*

**"Peer input helps us to support people more effectively. It is always wonderful to see our patients respond to peers with lived experience, the conversations are always so rich. I always come away knowing something about an individual that I had previously not known."**

*Community Mental Health Team (CMHT)  
Staff Member*

Strategic Objective:

# Agency

**Enable people to build their lives beyond services, through community activities, citizenship, learning and Recovery.**

During 2021/22 we have significantly broadened our community-based activity. People tell us that meeting someone who has faced similar challenges helps them to believe that change is possible. During Covid, isolation and loneliness increased for many people and disconnection from communities was impactful for some people's Recovery. However, we have also seen the value of communities coming together and real opportunities arising for people to become active citizens and organise themselves around their local community assets. During this year, our focus has been to build on this energy and to focus on reciprocal reconnection and exploration of how people can build their lives beyond mental health services.



**"R has stated often that he benefits from the groups because there is no pressure for him to attend. He likes the friendly, respectful nature of the groups and the way everyone is treated the same. He also feels the regular nature of most sessions provides some structure for his week."**

*Sports and Social Programme Coordinator*

**We know that for people to gain agency, they need to be able to see their own strengths, identify what is important to them and their values and begin to explore what might be possible. We have an individualised approach which is responsive and utilises a mixture of 1-1 conversations, social activities, and sports or creative sessions.**

Our aim is not to run mental health specific groups, but to create opportunities for people to engage in activities that are part of building a life that they wish to live, as defined by them and in the context of their community and their lives.

- We had **9,327** contacts with people through our Sports and Social Programme, with activities including coastal walks, football sessions, craft groups, gardening projects, Christmas market trips and badminton games. The programme is diverse and responsive to communities, with many sessions run collaboratively and in partnership where there are existing groups and new opportunities created where there are gaps and opportunities.
- We walked alongside **397** individuals supporting them to access community assets and explore what they want from life, beyond their recent experiences. This has included working in close partnership with other organisations and creating opportunities for people to build relationships.
- We worked on a 1-1 basis with **336** people at the point of transition between services: inpatient to community; CMHT to primary care; or moving on from mental health services altogether. During this work, we have been able to demonstrate the explicit value to people of access to lived experience expertise at the point of transition between services.

**“D is a transgender young person who in the past, has had some problems with drug use. As part of her recovery, she has been attending the AFC Bournemouth football session for about a year and a half and said that without these sessions, she felt she would have relapsed. Her confidence has improved so much, that she is now looking to take her football more seriously and has been offered trials for AFC Bournemouth women football team for next season.”**

**“There are more than a couple of people who attended the women’s group last year, who gained in confidence from the group, shared ways of managing each other’s specific goings on, but then have moved on to get into their own projects and goals. Specifically, a lady who wanted to focus on her business and felt just connecting with the women’s group and beyond that a parent’s group, helped her feel better about herself and branch out, so that she is no longer needing the group.”**

*Sports and Social Team*

## Impact

**As a result of accessing some of our activities and meeting our team during 2021/22, people have told us that they feel more confident in attending community groups and that they have aspirations for things that they previously didn’t think were possible for “people like us”. Individuals feel valued as active citizens and many people have come back to tell us that they are now looking for further opportunities to contribute within their community.**

Strategic Objective:

# Activism

Develop channels for grassroots activism, to enable people's voices to be heard, advocating for equality and social justice.

We know that people who experience mental ill health, trauma and emotional distress are often disadvantaged in our society. Everyone needs somewhere to live, someone to love and something to do and these fundamental needs can be hard to achieve for some people.

We also know that the pandemic has had an impact on the determinants in our lives which influence our mental health and wellbeing, such as poor living or working conditions, abuse, poverty, oppression or discrimination. These are very real struggles for many people in our local communities.



**“Young people have had quite a hammering over the past 2 years, had big gaps in education, been villainized in the press for being careless and labelled as snowflakes for feeling distress at a really crazy world. We need to stop ignoring kids until they grow up and listen to their wisdom. We were young once, but we aren't young now and believe me it's no walk in the park.”**

*Discovery Project*

**We believe that everyone has an equal right to enjoy all of the opportunities that life provides and through our work we continue to model and support people to aspire to more from their lives.**

Activism, by way of creating experiences of meaning and bringing about social change, is often core to people's personal Recovery and it is central to our work. We are proud to work alongside statutory services and within our communities, modelling what is possible, promoting Wellbeing and Recovery, challenging prejudice and stigma and transforming people's understanding of mental health.

- We advocated for **656** individuals supporting them to access their rights and to be heard. Issues people needed help with included access to treatment, communication with agencies, children's services, benefits, employment and housing.
- We contributed to **35** engagement events and consultation activities on topics including Carers, Young People and Health Inequalities. Acting as a critical friend and highlighting unmet need, our involvement in these sessions has enabled us to challenge from a lived experience perspective, but also to be part of cocreating solutions for the future.
- We achieved **18,686** digital interactions across our social media channels, raising awareness and amplifying people's voices and stories. Since the pandemic, our digital networks continue to grow significantly, which enables us to share information and stories, but also to broaden our collective voice, reach and influence.

**"My client's Personal Independence Payment claim was reviewed as a result of which he lost his entitlement to PIP. During the Covid restrictions around meeting face-to-face, I was able to support the client with the PIP appeal by telephone, as he was struggling to get help with the matter.**

**Sometimes my client found it very difficult to communicate and so he agreed I could speak to his brother who was very supportive and helpful. They supplied me with some supporting documentation using the camera on the phone to send me screenshots which enabled me to keep up to date with the correspondence. I was able to ensure that my client could articulate and evidence his circumstances and as a result his vitally needed financial support was reinstated."**

*Advocate*

**"When you have been homeless, stuff, things are important. No matter how small or tatty, because they are all I have. To you, it's a boot full of rubbish. To me, it's my entire life."**

*Advocacy client*

## Impact

**We believe that people should not be disadvantaged in life due to their experiences or circumstances.**

**During the year we have continued to use our voice, experiences and influence to highlight issues and amplify unseen inequalities around us and within our communities.**

**Through this work we aim to increase understanding and develop capacity and connection within communities across Dorset.**

# Strategic Objective: **System**

## **Further develop WaRP as Dorset ICS System partner, supporting delivery of Prevention at Scale and Population Health agendas.**

**As demand on statutory organisations increases and national policy drives forward an agenda of whole system approaches, we continue to build our reputation as a credible and professional lived experience organisation. Our position within the local mental health system allows us to represent and influence from a lived experience perspective at all levels of system transformation and service delivery, bringing our workforce and people who access local services, their supporters and carers alongside statutory services and local government departments, to act as “critical friends” supporting and informing the evolution, shaping and design of local services for public benefit.**

The Forum has a long history of doing this work and over time we have developed our infrastructure and a range of mechanisms that enables us to influence at a strategic level and to bring lived experience expertise to the heart of statutory service transformation and design.

During the year, there have been several important transformation programmes across the Dorset System. The Forum and the Dorset Wellbeing and Recovery Partnership are deemed to have a wealth of expertise and experience in coproduction and as a result we have been invited to take a significant role in the development of some of these programmes.

One of these is the Mental Health Integrated Community Care Review (MHICC) which is a nationally mandated programme to develop a fully modernised and integrated model of primary and community mental health care that works across health, social care, the voluntary sector and with local communities.

**“Thank you for attending, I was struck by a comment that you made – something that is so important for us to reflect within the strategic approach to working with people and communities. I made a note of it and wondered how you would feel about us using this as a quote from you, as a key partner and an expert in coproduction and engagement.”**

*Member of Transformation Team*



# Impact

**The experience of accessing services gives people a unique perspective that is immensely valuable when designing new ways of working. It challenges people to think not only about what is to be delivered, but also how it should be delivered. Lived experience input shows people what it feels like for a person who is in receipt of support and services, as well as how a person can contribute in their own right, throughout their interaction with services. During our work this year, we have been able to influence system design at the most strategic level, enabling people to think differently about how to include and value the voices and expertise of people within local communities.**

The NHS Long Term Plan (2019) is very clear that the development of Integrated Care Systems (ICS) across the country should include the voluntary sector and people with lived experience. Key national drivers such as the Levelling Up White Paper (2022) continue to specify that all systems and services should be co-created with the people who will access them. During 2021/22, we have continued to utilise lived experience expertise to bring about change in Dorset.

- We brought lived experience leadership to **17** strategic integrated boards or steering groups, attended **158** meetings and ensured that people who access services and communities were represented in decisions about local service design and delivery.
- We delivered **7** coproduction workshops to **248** staff working across the mental health system, developing a shared understanding of coproduction and embedding a commitment to draw on lived experience expertise equally alongside professional and technical expertise.
- We employed **51** people to work directly within statutory services, utilising their lived experience expertise and modelling Recovery to influence culture change on the ground.

**“It is incredibly important to remember that the mechanism by which people and communities have a voice needs to be integrated and woven throughout the whole of the ICS. Each Voluntary, Community Social Enterprise (VCSE) partner needs to amplify the voices of the people who they represent but equally we need to support colleagues from across the system to make sure that their beneficiaries, people who access their services are represented too.”**

*Forum Staff Member*

**“I just wanted to reach out and say a massive thank you for yesterday’s meeting re the transformation. Not only was it fantastic to get back to speaking face to face, but the entire conversation was a pleasure to be part of. It was so valuable to hear and assimilate different perspectives on our experience of transformation thus far and I really valued your input into thinking about how we can make what happens next effective, inclusive and productive.”**

*Senior Leader ICS*

# Strategic Objective: Parity

## Promote parity between physical and mental health, challenging health inequalities, through lived experience perspective.

The pandemic highlighted health inequalities in our community and during the year we have focused our resources on addressing some of the biggest challenges facing our beneficiaries. We have worked collaboratively with Dorset Clinical Commissioning Group (CCG), primary and secondary mental health services and other voluntary sector organisations, to address the physical health issues faced by people with serious mental health issues.

This work has involved being proactive around identifying the barriers that people experience. People tell us there are many reasons that prevent them from accessing support around their physical health when they have a diagnosed mental health concern or have experienced complex trauma in their lives. Stigma still very much exists, particularly self-stigma. People spoke to us about their fear, following previous occasions when they have been forcibly medicated or not had control or a voice in relation to decisions about their medication and treatment. These views and experiences can only be acknowledged by hearing from lived experience. During the year, we have supported people to have a voice within physical health services and created opportunities for staff to learn from our work in mental health services.

**“The exercise prescription is difficult because of disabled access or gendered changing rooms. Universal private changing is good for trans and disabled people.”**

*Participant in engagement (SMI)*

- We undertook work in Psychiatric Liaison services, delivering training to **120** staff working in Acute settings (Emergency Departments) to promote the importance of being trauma informed.
- We worked directly with **134** individuals with a focus on physical health, supporting activities that promoted physical activity and linked with primary care to improve access to Serious Mental Illness (SMI) physical health checks and other health improvement initiatives.
- We attended **14** system wide SMI Steering Groups ensuring that the perspective of people who access services was heard and that unmet need was identified.



**“E lives with her former stepmother following a long history of challenging family relationships. Her stepmother was shielding throughout the COVID-19 pandemic. E was not going out and she was not attending to her basic physical health needs.**

**Through working alongside a Peer Specialist, E was able to reflect that her feelings of abandonment might well be being triggered by the very real threat that COVID-19 posed to her stepmother. E was able to explain that she feared losing the only stable parental figure left in her life and that this had impacted on her ability to engage with life.**

**Since then, E has accessed Recovery Education to better understand her experiences during the pandemic and is in the process of developing a Recovery Plan to help her identify how she might build her life beyond the effects of the pandemic.”**

*Peer Specialist*

**“Some of the GP’s don’t understand the impact of anti-psychotic medication and weight. I have put on 2 stone, and I am often shamed for being overweight. There needs to be more education”.**

*Participant in engagement (SMI)*

**“I haven’t been under secondary mental health services for some time but every time I go to my GP for help with sleeping or low mood, I feel like I am being judged by my history and not by my life now. I am working full time and it’s important to me, I might need a little help to stay at work, but I certainly don’t think I am becoming as unwell again. The Peer Specialist understood this. When they shared some of their own experiences, it made me feel less broken and more normal.”**

*My Recovery Workbook*

## Impact

People from lower socioeconomic communities and those who are diagnosed with a serious mental illness are still dying many years before people without these societal constraints and disadvantages. This is a huge problem in today’s society and it is important for us to be highlighting some of these issues locally, offering our lived experience and expertise to co-create solutions and bring about change. This work is made more pressing with the impact of the pandemic and global unrest being felt in local economies and communities.

As a result of our activities this year, people have been able to share their stories. This helps the mental health system to understand the biggest challenges for people, as local services are being transformed. By walking a few steps with people and understanding “what matters to them” rather than “what is the matter with them”, we have been able to model a different way of working and break down some of the barriers that people face, thereby improving people’s experiences. Through our work, services are being challenged to see the whole person, in the context of their lives, not just the risks that the person presents or the perceived problem that they cause.

# Strategic Objective: Connection

Develop diverse access and alternative options for people to understand and reframe their life and mental health experiences.

As human beings, we need connection, but people tell us, when they are struggling, it can be difficult to identify, reach out and to connect with others. People tell us that they often see themselves, or feel that others see them, as different or broken.

Connection means different things to different people and during the year, we have worked together within our local communities to create a sense of belonging and inclusivity for people. We have collaborated with individuals, organisations and communities to offer a range of different opportunities and activities across Dorset that bring people together and help them to connect with others on their own terms and in ways that have value and meaning for them.

- We supported **99** people who have experienced traumatic bereavement, using Recovery-oriented approaches to identify what support would help them, ensuring warm handovers and offering space for reflection.
- We worked 1-1 with **733** individuals across community projects, supporting them to identify what was important to them and to build a life they wished to live. This work included signposting and navigation to a range of community activities and education opportunities.
- We supported **1,292** people who were in crisis at the Retreats, both in person and digitally through Attend Anywhere virtual drop in spaces.



"H contacted Dorset Open Door describing difficulties in managing her feelings associated with the loss of her husband, made worse by the COVID-19 pandemic. H described unanswered questions that she had as a result of the circumstances surrounding her husband's death. She felt that she needed to be able to process what had happened and that although people had suggested emotional support, she felt that understanding what had happened was fundamental to her. H described that a key challenge with this was the fact she only had a landline for communication, did not have a voicemail facility and did not use the internet. She wished to make contact with the services that had been involved in her husband's care at the end of his life.

Handover was offered, brokering and exploring ways in which the named service could make contact with H and the expectations of both parties in this. Follow up contact was made with H who said that she had felt listened to and understood. H felt that she had some answers to her questions and she had agreed to join the ongoing peer support network provided by the service."

*Dorset Open Door*

"The most important thing we do at the Retreats when someone is in crisis or distress is meet them where they are (emotionally) and not where we want them to be. This changes the interaction and starts a reciprocal conversation."

*Peer Specialist*

"I have had a lot of very helpful support from the CMHT (when I think of the state I was in when I was first accepted for help it is a surprise to me that I am still alive), but this work on the My Recovery Plan has covered new and crucially important ground and significantly has taught me how to focus on managing my mental health in the future.

The work we have done together has encouraged me to be proactive in both noticing and responding wisely to early warning signs. By being listened to on such a deep level, and exploring together the implications of my reactions, I feel (for the first time ever) empowered about making appropriate choices for myself before things get too bad. There is a plan for the future. There are places and people I can contact if I feel I need help. I feel now as if I am in a strong position"

*My Recovery Plan participant*

## Impact

**Being able to identify what you want from your life is such an important part of a person's Recovery journey. People tell us repeatedly that services and organisations do not talk to each other, which creates unnecessary and unhelpful barriers or hoops for people to jump through, to get the support that they need. Much of our work during this year has been focused on bringing organisations together, identifying shared purpose and removing hand offs between services. We have fostered the concept of a warm handover, ensuring that people receive seamless interaction into and out of contact with us.**

# Strategic Objective: Collaboration

Develop reciprocal collaborations within local communities to build capacity, add value and amplify people's voices.

Our organisation has a long history of working in partnership and with the principles of Coproduction. We are committed to collaboration across all of our activities and projects, to increase understanding of mental health and to develop capacity within local communities across Dorset. During the year, we have been intentional about working alongside smaller organisations to develop their capacity and to support them to amplify their (organisational) voice within services and across the Dorset system.



We know that as we work with system change and transformation, we are much stronger together. We have been delighted during the year to develop relationships with organisations and community groups that share our values and purpose. Together we have been able to design collaborative pathways that ensure no wrong door, walking a few steps with people between organisations to provide warm handovers and to remove unhelpful and unnecessary barriers.

- We worked collaboratively with **313** community organisations to develop whole system approaches, reduce duplication, share learning and build capacity.
- We worked collaboratively alongside schools, health services and youth organisations with **87** young people across Dorset.
- We delivered **7** new projects in partnership with organisations outside the NHS.

**“We were approached by the Local Authority who had developed some local land. They wanted to offer charitable organisations a space for allotments and community gardening projects. Both we and another local mental health charity were interested in taking this forward as an opportunity for people.**

Rather than just go ahead and have two projects that could essentially duplicate each other, we got together as organisations and talked through the benefits that this project could offer to people. Through these conversations, it became apparent that our approaches were quite different and could potentially complement each other and more importantly, provide more choice and opportunity for individuals.

We went back to the Local Authority with a proposal to share a piece of land and worked together to outline the mechanisms to set up the project and how we would share resources to enable more people from broader walks of life to access the programme.

We are now collaborating with this organisation in a couple of other areas and have built some great relationships. People move between projects, there are no barriers or referrals and there are double the spaces available for local people to access different projects and activities.”  
Social Connection Lead

**“I now know who can help me inside and outside of school also what I can do to help myself.”**

*Discovery Project participant*

**“Having a young person peer alongside our staff and participants has been a really positive experience. Young people have really engaged and we have learned a lot. She is professional and warm, and we’ve loved working with her.”**

*Youth Organisation*

## Impact

People tell us that finding and navigating the support that is available in local communities can be difficult for them.

Every new service is another time you have to tell your story and go through another assessment. During the year, we have enabled people to talk about their anxieties and be heard, so that they are able to cope with the fear of meeting new people and it is not debilitating for them. We have assisted people with the challenge of reaching out and finding help, so that they know that they don’t have to suffer in isolation.



Strategic Objective:

# Employment

**Pioneer development of peer employment pathways and opportunities across the Dorset System, building understanding and capability.**

As a lived experience infrastructure, our organisation understands the value of lived experience within the workplace. During the year, we have further developed mechanisms to support people to stay well in work. This includes activity within our own organisation, as well as support for external organisations.

Vocation, meaning and purpose are all things that people have told us are important to them in building a life worth living for themselves. For many years, until very recently, if you were diagnosed with a serious mental health issue there was an expectation that you would not work again. This is changing, slowly. Our work continues to model how lived experience in the workplace can be celebrated and supported and to demonstrate the value of meaningful employment to people who experience mental health concerns, emotional distress and trauma.

**“You get used to speaking to people, having conversations with co-workers and customers, and it steadily builds up your confidence without you even realising it. And then one day, after a few weeks, you do a double take in your mind, blink a few times and realise how far you’ve come.”**

*Dorset Work Matters client*

**“Work is a supportive place where I’ve realized my mental health is only a part of who I am, that I am not defined by it – it’s at the back of my brain, not the front of it!”**

*Peer Specialist*



# Impact

**Our collaboration with other organisations has enabled us to think about development and progression pathways across the Dorset System. We want to encourage our staff and other people with lived experience across the Dorset System, to have aspirations and to fulfil their potential. During the year we have worked alongside local employers, creating opportunities for learning and personal development, building confidence and capability around supporting people from a trauma informed perspective, thereby creating greater opportunities and better experiences for people in Dorset.**

**The pandemic has given many people an experience of compromised mental health and also prompted people to review what they want from their work and from their life. The pandemic has given us the opportunity to have different conversations, to model what is possible and to build understanding, challenging people's perceptions around mental health in life and in the workplace.**

- Dorset Work Matters received **402** referrals from Community Mental Health Teams and supported **230** people to achieve a positive work outcome. This included helping **118** people into competitive employment, using the Individual Placement and Support (IPS) approach to employment support.
- We supported **82** staff and volunteers to intentionally share their lived experience of mental health in the context of their work.
- We supported the development of Lived Experience Leadership including **2** band 7 NHS Advanced Lived Experience Practitioners and **14** Peer Lead Operational Managers.

**“When your partner is in the middle of a mental health crisis, being completely beaten by, a not just unsupportive employer, but one that is actively using their mental health against them – you want to be there for them in every way possible. Feeling completely helpless whilst watching the person you love slip away is one of the hardest things ever.**

**Unfortunately, I had to continue working while this was happening and I hated leaving the house each day knowing that even if I was at home, I would not have the right words. This is where Dorset Work Matters came in. The difference in my wife after the very first phone call was incredible. Someone that just got it. And not only got it – but could sympathise, empathise, listen, support, tell her she wasn't going mad, it wasn't all in her head! To know that she was getting the right help, the right advice and support, as and when she needed it was such a relief.”**

*Dorset Work Matters feedback*

# Future Plans

Developing our Strategy for 2021-2024 with supporting strategies, has been an important achievement during the year, giving us a clear and exciting focus and road map for the years ahead, as we work to influence change and deliver impact across our eight Strategic Objective areas.

Our future developments include:



## Diversity

Further developing our lived experience infrastructure and constituency networks to ensure that we are engaging and representative of different communities across Dorset. We are working intentionally to create pathways and provide opportunities for a more diverse workforce that can represent all aspects of experience in our society, increasing understanding and influencing change as part of delivering our strategy.

## Partnerships

Developing relationships across the Dorset System and local communities to collaborate, add value, build capacity, grow connections and influence change. We will continue to enable local communities to have an increased understanding of mental health, through Recovery Education and Coproduction.



## Income diversification

Developing different income generation and fundraising activities for longer term sustainability, independence and integrity to fulfil the Forum's charitable purpose.



## Demonstrating impact

Continuing to develop the Forum's systems and processes as part of our ongoing data journey, to capture and communicate the impact and outcomes of our work for funders, staff, beneficiaries and the wider public.

## Digital transformation

Building on considerable progress made during 2021/22, further embracing new ways of working and exploring opportunities for developing innovation, efficiencies, quality assurance, governance, communication and engagement throughout all of the Charity's operations. This includes a commitment to supporting equality of opportunity, understanding different needs and continuous learning and development.

# Financial Review

## Financial Position

The Forum has a range of funding streams, which include contracts and grants to provide specific services, as detailed in the financial statements, as well as funding from grant making bodies to fulfil our aims and objectives. In addition to this, the Forum continues to develop its social enterprise activities. Many of our activities are currently focused within the NHS and wider integrated system, in order to bring lived experience expertise and challenge on behalf of beneficiaries to the shaping and future design of local mental health services and beyond. As with many third sector and 'Not for Profit' organisations, our funding streams are timebound, which means continual review of fundraising strategy.

Maintaining independence as an organisation is vital in our work. Our fundraising strategy for the years ahead includes increasing our independent funding sources and further developing our social enterprise activities, in response to the growing awareness of the need to understand and respond to mental health differently across all sectors, communities and systems.

The Forum continues to manage its resources in an efficient manner and is therefore able to ensure that funding is targeted on developing and improving services. We recognise the necessity of raising funds and generating diverse income streams, in order to strengthen our service delivery and to fulfil our objectives and potential as an organisation moving forward. Achieving longer term financial sustainability is a priority for the years ahead, even more so as we anticipate financial pressures on public services in the years to come as a result of the pandemic and other global factors.

The Forum has received a number of generous donations and support throughout the year from individuals, legacies, community groups and organisations. We want to specifically acknowledge Lucie Rawlins' netball fundraising event, as well as generous donations from Colin J Clarke Funeral Services.

The Trustees would like to thank everyone who has contributed to the Forum's activities during the year for their support, including the Charity's workforce, volunteers, beneficiaries, funders and donors.

Income during the year was £1,544,580 (2021: £1,186,147) of which £1,433,290 (2021: £1,059,933) related to restricted project activities. Total expenditure during the year was £1,076,395 (2021: £941,466), of which £1,019,397 (2021: £864,379) was from restricted funds and £56,998 (2021: £77,087) from unrestricted funds. Net income for the year totalled £468,185 (2021: £244,681) with net income of £54,292 (2021: £49,127) relating to unrestricted activities and net income of £413,893 (2021: £195,554) relating to restricted funds.

Income levels have been consistent during the year. Trustees are assured and satisfied that the organisation is a going concern for the next 12 months and has financial resilience for the foreseeable future.

Reserves at 31st March 2022 total £1,265,239 (2021: £797,054) and consist of restricted funds of £966,850 (2021: £552,957) and unrestricted funds of £298,389 (2021: £244,097), of which £56,750 (2021: £65,000) is determined by the Trustees as designated reserves for specific purposes.

## Fundraising Activities

The Forum does not actively undertake any direct fundraising activities and does not engage anyone to undertake such activities on its behalf.



# Financial and Management Policies

## Reserves Policy

Trustees are aware of the need to retain funding for future endeavours and developments, in order to meet the needs of the Charity's beneficiaries. Trustees review the level of reserves required on a regular basis, to ensure that they are adequate to fulfil the Charity's continuing obligations and in line with the Charity's Reserves Policy and objectives.

The Charity regularly reviews its Reserves Policy to ensure that it is achieving the appropriate balance between the need to serve beneficiaries as quickly as possible and the need to manage risks appropriately. In doing so, the Charity considers sector guidance for charities to hold reserves for the purpose of protecting the continuity of the Charity's work, providing funds needed for the development of the Charity, or providing funds needed to replace assets. It is the policy of the Charity that reserves should provide adequate financial stability and means for the Charity to meet its charitable objectives for the foreseeable future.

The Reserves Policy and the designations made within the reserves are key tools in monitoring and maintaining sufficient cash flows. The Trustees deem it necessary to have the security of reserves to maintain and develop activities with confidence, particularly where there may be timing delays with funding streams and to build resilience in the event of unforeseen difficulties. The determination of an appropriate reserves level is a key part of the strategic planning process and is linked to risk assessment of key areas of income and expenditure, along with future strategic development.

Trustees review the allocation of the Charity's reserves and make specific designations where applicable. Restricted funds are funds required to be used for a specific purpose. Free reserves represent unrestricted funds of the Charity excluding restricted and designated funds. The Trustees aim to hold sufficient free reserves to ensure financial sustainability, operational continuity to meet the needs of beneficiaries in the event of unforeseen situations and future strategic development.

The Trustees have reviewed the Reserves Policy during the year. Trustees consider it prudent to set aside an amount equivalent to between three and twelve months of anticipated annual running costs. For the coming year, based on 2021/22 figures, this range would be between £96,102 and £384,408. As at 31 March 2022, unrestricted reserves stood at £298,389, less £2,257 held as fixed assets and £56,750 designated reserves leaving £239,382 (2021: £175,332) of free reserves which is within the range of this Reserves Policy.

These reserves would enable the Charity to continue to operate in the short term in the event of income shortfall and while action is being taken to replace funding or to implement required changes. Trustees are mindful of the long-term impact of the pandemic and are taking active steps to increase the level of free reserves over the next two years to build resilience and the longer-term sustainability and stability of the Charity.



# Investment Powers

The Constitution authorises the Trustees to use all money raised to further its Objects and to do all things that are lawful and conducive to the attainment of those Objects and does not prevent investment.

# Investment Policy

Management of cash reserves is governed by the Investment Policy, which establishes the Charity's investment objectives (in order of priority) as:

- (1) Capital preservation;
- (2) Liquidity; and
- (3) Income generation.

The Policy prohibits investment in instruments which do not guarantee principal repayment and controls credit risk, with bank counterparty limits approved by the Finance and Audit Committee.

Liquidity is ensured by specifying a minimum balance to be retained in instant access bank accounts, with a complementary limit on the average term or notice period for other deposits. Within these parameters, the Finance Team has delegated authority to manage the Charity's current and deposit accounts to maximise interest income, as far as consistent with limiting operational risk. This means that sufficient funds are available at any one time to ensure that the Charity can meet all its liabilities.

The Investment Policy is approved by the Board and monitored by the Finance and Audit Committee.

# Risk Management

The Trustees acknowledge their responsibility to give due consideration to the risks to which the Charity is exposed and have put in place processes to identify and manage risks through Risk Registers. Risks are regularly reviewed, assessed, managed and escalated appropriately in accordance with the Risk Management Policy.

The Trustees have given due consideration to the major risks to which the Charity is exposed and are satisfied that systems, processes and procedures are established in order to manage these risks. Risk management processes are in place and continue to be developed as required throughout the organisation. The Forum is committed to the continuous improvement of practices and procedures, including identifying improvements to risk management processes. These include regular review of internal control systems, which enable the Senior Leadership Team and Trustees to identify, manage and satisfactorily control risk exposures. The top three risks to the charity in the year ahead are:

- The pace of change both internally and also externally across the Dorset System.
- Rise in demand.
- Financial pressures for the Forum workforce, beneficiaries and with funders.

The Board regularly reviews organisational priorities, associated risks and mitigating factors. Work to strengthen governance mechanisms has continued during the year and internal audit processes have been further developed, building on the continuous improvement and development of the Charity's controls and procedures. Board committees provide scrutiny and information for the Board, supported by voluntary Governance Partners who work alongside Trustees, adding valuable capacity to the Charity's governance processes and activities.

# Structure, Governance and Management

## Governing Document and Constitution

Dorset Mental Health Forum is a registered Charitable Incorporated Organisation (CIO) in England and Wales, Charity number 1169215. The CIO's principal office is 29/29A Durngate Street, Dorchester, Dorset, DT1 1JP. It is governed by its Constitution which was originally adopted on 16 September 2016 when the CIO was first established. The Dorset Mental Health Forum, Charity number 1073818, transferred all assets, liabilities, activities, staff and undertakings to the new Dorset Mental Health Forum CIO on 31st March 2017.

The Forum Charity is governed by its Constitution and the Objects of the CIO are:

To promote and protect mental health for the public benefit, including but not exclusively by:

1. Supporting the Recovery of people experiencing mental distress, by creating opportunities for people to reconnect with their own strengths and resources, in order to build the lives they wish to live.
2. Challenging discrimination against people experiencing or affected by mental distress by modelling the value of lived experience expertise, including representation and involvement in the improvement and shaping of mental health services.
3. Advancing the education and understanding of the general public in all areas relating to mental health by promoting the principles of mental health, Wellbeing and Recovery through Coproduction and Recovery Education.
4. Developing the skills, capacity and opportunities to build socially inclusive, equitable and reciprocal communities which actively support good mental health.

## Public Benefit

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and Coproduction.

The Trustees have paid due regard to the Charity Commission's guidance on public benefit in deciding the activities undertaken by the Charity during the year. The Trustees are satisfied that the information provided in the Trustees' report and accounts meets the public benefit reporting requirements.

Trustees understand the difference made to the lives of the Charity's beneficiaries, as well as to society for public benefit. The Forum's beneficial purpose and activities are as stated above. The Forum's workforce models, facilitates and provides hope, opportunity and understanding around mental health throughout all of its projects and activities. This has enormous impact for people who experience mental illness and who have direct contact with any of the Forum's workforce and operational activities, as direct beneficiaries. In addition to this direct benefit, the Forum's activities also raise awareness, challenge stigma, influence culture and change behaviour within individuals, organisations, local communities and service systems, for public benefit in Dorset and beyond.

## Recruitment and Appointment of Trustees

Appointment of Board members (“Trustees” for Charity legislation purposes) is governed by the Constitution of the Charity. Trustees are appointed, and reappointed, by the Members of the Charity at the AGM. New Trustees may also be appointed between AGMs by the existing Trustees, but must retire and be reappointed by the Members at the subsequent AGM. The Board reviews its composition and performance regularly to ensure the appropriate balance of skills, experience, backgrounds and knowledge.

The following people were Trustees of the Charity during the year:

Ann Abraham (Chair)  
Chris Balfe  
Rosanna Dean  
Peter Lovibond  
Arthur Merchant  
Sarah Murray  
Jan Owens (retired November 2021)  
Davide Rodrigues

None of the Trustees has any beneficial interest in the Charity.

The Forum’s Board of Trustees is responsible for the overall governance and strategic direction of the Charity. The Chief Executive is accountable to the Forum’s Board of Trustees. During the year, all Trustee and Board activities were able to be carried out either in person or virtually, with minimal disruption to business.

## Induction and Training of Trustees

New Trustees undergo an induction period in which they become familiar with the activities of the Charity, its core values, and its governance structure and processes, with support and mentoring as required. Once appointed, new Trustees keep themselves apprised of any new guidance issued by the Charity Commission and other relevant agencies. During the year, the Board has developed a Governance Handbook for new and existing Trustees, which is being made accessible through an intranet for Trustees, as part of the Charity’s ongoing digital transformation work.

During the year, we have continued to review and strengthen the Charity’s governance structure. Trustees meet quarterly for Board meetings to discuss the business and governance of the organisation. This includes developing strategy, risk management and reviewing operational and financial information for the Charity. The Finance and Audit Committee and the Appointments and Remuneration Committee also meet quarterly during the year, feeding directly into Board meetings as part of a programmed Board cycle for the year.

Trustees are included and encouraged to participate in whole team building events and Forum activities, as well as to undertake training and attend Recovery Education Centre courses. The Forum provides full indemnity insurance for its Trustees.

# Structure, Governance and Management

## Board Development

Development work is ongoing with the Forum Board to build resilience and longer-term sustainability for the organisation. Diversity of experience and perspective and the required skill set of the Board is reviewed regularly. The Charity considers review, appraisal and development of the Board and its effectiveness, to be important processes and utilises sector resources to undertake these activities and inform performance and appropriate governance. These include the updated Charity Governance Code (2020) and the related NCVO Governance Wheel Toolkit (2021). The Board has regular Away Days to spend specific time on learning and development for Trustees, Board development and strategic review and planning.

## Policies

The Forum is committed to the continuous improvement of practices, policies and procedures and continues to review and update these as required and on an ongoing basis. Trustees have reviewed the Policy Framework during the year and refreshed key policies such as Safeguarding, Complaints, Freedom to Speak Out and Risk Management. Further review and development of policies is taking place during 2022/23.

The Charity is continuing to work through the NCVO Trusted Charity Quality Standards, with a view to seeking external assessment towards the end of 2022/23.



# Statement of Trustees' Responsibilities

**The Trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).**

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the income and expenditure of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgments and accounting estimates that are reasonable and prudent;
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the constitution. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the trustees are aware:

- There is no relevant audit information of which the Charity's auditors are unaware; and
- The trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



**Ann Abraham**  
Chair of the Trustee Board

**26th July 2022**

# Independent Auditor's Report

## Opinion

We have audited the financial statements of Dorset Mental Health Forum (the 'Charitable incorporated organisation') for the year ended 31 March 2022 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cashflows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the Charity's affairs as at 31 March 2022 and of its income and expenditure for the period then ended;
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- Have been prepared in accordance with the requirements of the Charities Act 2011.

## Basis of opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

## Conclusions relating to going concern

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the society's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

## Other information

The Trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

## Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- The information given in the report of the Trustees is inconsistent in any material respect with the financial statements;
- Sufficient accounting records have not been kept;
- The financial statements are not in agreement with the accounting records and returns; or
- We have not obtained all the information and explanations necessary for the purposes of our audit.

## Responsibilities of the Trustees

As explained more fully in the Trustees' responsibilities statement, the Trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as they determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

## Our responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditor's report.

## Identifying and assessing potential risks of material misstatement due to irregularities

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- The legal and regulatory framework in which the Charity operates;
- The nature of the sector in which the Charity operates;
- The control environment and controls established to mitigate such risks;
- The results of our enquiries of management about their identification and assessment of risks of irregularities;
- Discussions with the audit engagement team about where fraud might occur;
- The incentives for fraud.

# Independent Auditor's Report

Laws and regulations which are considered to be significant to the Charity include those relating to the requirements of financial reporting framework FRS102, the Charities Act 2011, UK tax legislation, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the Charity.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

## Audit responses to risks identified

We undertook audit procedures to respond to the risks identified, and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- Gaining an understanding of the Charity's procedures for ensuring compliance with laws and regulations;
- Testing the appropriateness of journal entries and other adjustments;
- Considering whether accounting estimates were indicative of potential bias;
- Considering whether any transactions arose outside the normal course of business;
- Making enquiries of management;
- Corroborating our enquiries through review of Board Minutes and correspondence.

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at:

[www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities)

This description forms part of our auditor's report.

## Use of our report

This report is made solely to the Charity's Trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

We have been appointed as auditor under section 144/145 of the Charities Act 2011 and report in accordance with the regulations made under section 145 of that Act.

**A C Mole (Statutory Auditor)  
Chartered Accountants and Statutory  
Auditors  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset TA1 2PX**



**26th July 2022**

*A C Mole is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006.*



# Statement of Financial Activities

## For the year ended 31 March 2022

	Notes	Unrestricted Funds	Restricted Funds	Total Funds 2022	Unrestricted Funds	Restricted Funds	Total Funds 2021
		£	£	£	£	£	£
<b>Income:</b>							
Donations and legacies	2	2,305	-	2,305	3,153	-	3,153
Charitable activities	3	107,107	1,433,290	1,540,397	122,183	1,059,933	1,182,116
Other		1,878	-	1,878	878	-	878
<b>Total income</b>		<b>111,290</b>	<b>1,433,290</b>	<b>1,544,580</b>	<b>126,214</b>	<b>1,059,933</b>	<b>1,186,147</b>
<b>Expenditure:</b>							
Charitable activities	4	56,998	1,019,397	1,076,395	77,087	864,379	941,466
<b>Total expenditure</b>		<b>56,998</b>	<b>1,019,397</b>	<b>1,076,395</b>	<b>77,087</b>	<b>864,379</b>	<b>941,466</b>
<b>Net income before transfers</b>		<b>54,292</b>	<b>413,893</b>	<b>468,185</b>	<b>49,127</b>	<b>195,554</b>	<b>244,681</b>
Transfers between funds		-	-	-	12,307	(12,307)	-
<b>Net movement in funds</b>		<b>54,292</b>	<b>413,893</b>	<b>468,185</b>	<b>61,434</b>	<b>183,247</b>	<b>244,681</b>
<b>Reconciliation of funds:</b>							
<b>Total funds brought forward</b>		<b>244,097</b>	<b>552,957</b>	<b>797,054</b>	<b>182,663</b>	<b>369,710</b>	<b>552,373</b>
<b>Total funds carried forward</b>		<b>298,389</b>	<b>966,850</b>	<b>1,265,239</b>	<b>244,097</b>	<b>552,957</b>	<b>797,054</b>

# Balance Sheet

## As at 31 March 2022

	Notes	2022		2021	
		£	£	£	£
<b>Fixed assets</b>					
Tangible assets	9		2,257		3,765
<b>Current assets</b>					
Debtors	10		343,983		172,719
Cash at bank and in hand			1,305,246		1,135,228
			<b>1,649,229</b>		<b>1,307,947</b>
<b>Creditors</b>					
Amounts falling due within one year	11	<b>386,247</b>		<b>514,658</b>	
<b>Net current assets</b>			<b>1,262,982</b>		<b>793,289</b>
<b>Total assets less current liabilities</b>			<b>1,265,239</b>		<b>797,054</b>
<b>Net assets</b>			<b>1,265,239</b>		<b>797,054</b>
<b>The funds of the Charity</b>					
<b>Unrestricted funds</b>					
General funds	15		241,639		179,097
Designated funds	15		56,750		65,000
			<b>298,389</b>		<b>244,097</b>
<b>Restricted funds</b>	15		966,850		552,957
<b>Total Charity funds</b>			<b>1,265,239</b>		<b>797,054</b>

Approved by the Board of Trustees for issue on 26th July 2022 and signed on their behalf by:



**Ann Abraham**  
Chair of the Trustee Board

# Statement of Cashflows

For the year ended 31 March 2022

	Notes	2022		2021	
		£	£	£	£
<b>Cashflows from operating activities</b>					
Net cash provided by operating activities	13		168,140		511,763
<b>Cashflows from investing activities</b>					
Interest from investment		1,878		878	
Net cash provided by investing activities			1,878		878
Change in cash and cash equivalents in the reporting period			170,018		512,641
Cash and cash equivalents at the beginning of the reporting period			1,135,228		622,587
<b>Cash and cash equivalents at the end of the reporting period</b>			<b>1,305,246</b>		<b>1,135,228</b>

# Notes to the Financial Statements

## For the year ended 31 March 2022

### 1. Accounting Policies

#### 1.1 General information

Dorset Mental Health Forum is a Charitable Incorporated Organisation governed by its Constitution. The address of the principal office is given on page 56. The nature of the Charity's operations and its principal activities are set out in the Trustees' report on pages 3–37.

#### Basis of accounting and assessment of going concern

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (issued October 2019) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102) and the Charities Act 2011.

The Charity meets the definition of a public benefit entity under FRS 102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

#### 1.2 Income recognition

All income is included in the statement of financial activities when the Charity is entitled to the income, it is probable the income will be received and the amount can be measured reliably. The following specific policies are applied to particular categories of income.

Donations and gifts are recognised in the Statement of Financial Activities when receivable. Legacy income is recognised in the financial statements in the period that it has been received or where there is sufficient evidence that it is probable that the legacy will be received.

Income from grants and contracts, relating to charitable activities are recognised in the Statement of Financial Activities when the charity has been notified in writing of both the amount and settlement date. In the event that grants are subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those conditions is wholly within the control of the charity.

If there is a Service Level Agreement or Contract in place income is taken into account in the period to which it relates. Where grants and contract income received have conditions or restrictions as to their use attached the income is recognised as restricted income funds. Where no such conditions or restrictions exist, grants and contract income received are recognised as unrestricted income.

Investment income in respect of funds held on deposit is included when receivable and the amount can be measured reliably. This is normally upon notification of the interest paid by the bank.

Other income is recognised in the Statement of Financial Activities when receivable this relates largely to the reimbursement of expenditure.

#### 1.3 Donated services

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

#### 1.4 Expenditure recognition

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably. All expenditure is accounted for on an accruals basis. All expenses, including support costs and governance costs, are allocated or apportioned to the applicable expenditure headings in the statement of financial activities.

Charitable expenditure comprises those costs incurred by the Charity in the delivery of its charitable activities and services. It includes both costs that can be allocated directly to such activities and costs of an indirect nature which are necessary to support them. Those support costs of an indirect nature include the resources of senior management, personnel, HR, IT, premises,

finance and governance which are apportioned on a basis consistent with the use of resources largely by reference to time spent although alternative methods of apportionment may be used where they produce a more equitable result. Details of apportionment of support costs are shown in note 5.

### 1.5 Pension costs

The Charity operates workplace pension schemes for its qualifying employees. The schemes used are the government established National Employment Savings Trust (NEST) and Standard Life Stakeholder Scheme. Both schemes are defined contribution schemes and the amount included in the Statement of Financial Activities represents the contributions payable to the scheme in respect of the accounting period.

### 1.6 Operating leases

Leases in which substantially all the risks and rewards of ownership are retained by the lessor are classified as operating leases. Rentals payable under operating leases are charged to the Statement of Financial Activities over the term of the lease. The Charity has operating leases for the premises from which it operates. The title of the leased premises remains with the lessor.

### 1.7 Fixed assets

Where fixed assets are purchased they are stated at their purchase cost plus any incidental expenses of acquisition. Where fixed assets are donated, they are stated at their estimated market value

on acquisition. Depreciation is charged in respect of fixed assets and is calculated so as to write off the cost of the assets, less any estimated residual value, over their expected useful economic useful lives as follows:

Office equipment and furniture - 25% of written down value

### 1.8 Cash and cash equivalents

Cash and cash equivalents includes cash in hand and other short term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

### 1.9 Taxation

Dorset Mental Health Forum is a registered charity and is therefore not liable to taxation to the extent that its income and gains are applicable to charitable purposes only. Value added tax is not recoverable and is therefore included in the relevant costs in the Statement of Financial Activities.

### 1.10 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Board in furtherance of general objectives of the Charity, and which have not been designated for other purposes.

Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

Restricted funds are to be used for specific purposes as laid down by the donor.

Expenditure which meets this criterion is charged to the fund, together with fair allocation of management and support costs as appropriate.

### 1.11 Financial instruments

The Charity only has financial assets and liabilities that qualify as basic financial instruments including trade and other debtors, cash and bank balances and trade and other payables. Basic financial instruments are initially recognised at transaction price and subsequently at amortised cost.

### 1.12 Critical accounting estimates and judgements

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

The Trustees are of the opinion that there are no estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

## 2. Income from donations and legacies

	Unrestricted Funds	Restricted Funds	Total Funds 2022	Unrestricted Funds	Restricted Funds	Total Funds 2021
	£	£	£	£	£	£
Donations and gifts	2,305	-	2,305	3,153	-	3,153
	<b>2,305</b>	<b>-</b>	<b>2,305</b>	<b>3,153</b>	<b>-</b>	<b>3,153</b>

### 3. Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds 2022	Unrestricted Funds	Restricted Funds	Total Funds 2021
	£	£	£	£	£	£
<b>Advocacy Services</b>						
Dorset Council	-	66,596	66,596	-	66,596	66,596
Dorset Healthcare	-	7,563	7,563	-	7,565	7,565
BCP Council	-	99,898	99,898	-	99,898	99,898
<b>Lived Experience Infrastructure</b>						
Dorset HealthCare	84,259	-	84,259	84,259	-	84,259
Dorset CCG	10,000	-	10,000	10,000	-	10,000
Borough of Poole/BCP Council	5,000	-	5,000	5,000	-	5,000
<b>National Lottery Community Fund</b>	-	95,500	95,500	-	105,500	105,500
<b>National Lottery</b>	-	-	-	-	30,400	30,400
<b>Recovery Education Centre (REC)</b>						
Dorset HealthCare	-	33,800	33,800	-	33,800	33,800
<b>Dorset Wellbeing and Recovery Partnership</b>						
Dorset HealthCare	-	820,053	820,053	-	538,004	538,004
DMH Carers Project Income	-	3,000	3,000	-	3,000	3,000
<b>Employment Service</b>						
Dorset CCG	-	125,000	125,000	-	125,000	125,000
<b>Sports and Social Programme</b>	1,963	1,480	3,443	-	5,980	5,980
<b>Dorset CCG</b>						
Business Think Tank	-	-	-	-	44,190	44,190
Dorset Open Door	-	41,056	41,056	15,600	-	15,600
SMI Physical Health	-	25,392	25,392	-	-	-
Suicide Prevention	-	14,256	14,256	-	-	-
<b>Social Enterprise</b>	3,670	-	3,670	6,970	-	6,970
<b>CJRS</b>	2,211	-	2,211	-	-	-
<b>Talbot Village Trust</b>	-	99,696	99,696	-	-	-
<b>Other</b>	4	-	4	354	-	354
	<b>107,107</b>	<b>1,433,290</b>	<b>1,540,397</b>	<b>122,183</b>	<b>1,059,933</b>	<b>1,182,116</b>

### Notes to the Financial Statements - For the year ended 31 March 2022

## 4. Expenditure on charitable activities

	Activities undertaken directly	Support Costs	Total 2022	Activities undertaken directly	Support Costs	Total 2021
	£	£	£	£	£	£
<b>Advocacy</b>	100,068	32,400	132,468	107,538	49,200	156,738
<b>WaRP Projects</b>	586,432	177,156	763,588	342,554	155,579	498,133
<b>WaRP Core</b>	48,748	-	48,748	77,087	-	77,087
<b>Sports and Social</b>	-	-	-	2,740	1,642	4,382
<b>National Lottery Community Fund</b>	92,982	25,100	118,082	114,686	44,580	159,266
<b>DMH Carers Project</b>	1,095	-	1,095	1,670	-	1,670
<b>Dorset CCG</b>	-	-	-	44,190	-	44,190
<b>Lloyds Bank</b>	-	4,164	4,164	-	-	-
<b>Charity Development</b>	3,600	-	3,600	-	-	-
<b>Digital Development</b>	4,650	-	4,650	-	-	-
	<b>837,575</b>	<b>238,820</b>	<b>1,076,395</b>	<b>690,465</b>	<b>251,001</b>	<b>941,466</b>

## 5. Analysis of support costs

	Advocacy	National Lottery	WaRP Projects	Lloyds Bank	Total
	£	£	£	£	£
<b>Central Services</b>					
HR	5,146	4,730	28,982	-	38,858
Finance	5,327	4,762	29,025	-	39,114
IT	6,305	1,287	35,472	-	43,064
<b>Senior Leadership Team</b>	8,945	8,255	49,794	4,164	71,158
<b>Premises &amp; Office</b>	1,864	1,631	10,050	-	13,545
<b>Governance &amp; Strategic Costs</b>	3,689	3,321	17,139	-	24,149
<b>PR &amp; Marketing</b>	1,124	1,114	6,694	-	8,932
	<b>32,400</b>	<b>25,100</b>	<b>177,156</b>	<b>4,164</b>	<b>238,820</b>

## 6. Auditor's remuneration

	2022	2021
	£	£
<b>Audit fee</b>	5,570	5,700
<b>Accountancy fees</b>	4,630	4,410
<b>Payroll services</b>	8,905	4,596
	<b>19,105</b>	<b>14,706</b>

## 7. Trustees expenses and remuneration

No remuneration has been paid to or on behalf of the Trustees (2021: Nil).

Expenses totalling £Nil (2021: £Nil) were reimbursed to Nil (2021: Nil) Trustees for travel and subsistence during the year.

## 8. Employees and employment costs

	2022	2021
	£	£
<b>Wages and salaries</b>	766,466	682,005
<b>Social security costs</b>	51,062	47,199
<b>Pension costs</b>	32,799	20,662
	<b>850,327</b>	<b>749,866</b>

No individual employee was paid over £60,000 (2021: none).

The average monthly headcount (number of staff employed) during the year was:

	2022	2021
	People	People
<b>All Staff</b>	77	72

The key management personnel of the Charity are considered to be the Chief Executive Officer, Director of Operations and Head of Impact and Quality (left May 2021). The total employee benefits for key management personnel were £103,828 (2021: £120,871).

The Charity operates defined contribution pension schemes. The pension cost charged to the Statement of Financial Activities for the period represents contributions payable by the Charity to the schemes and amounted to £32,799 (2021: £20,662).

Volunteers contribute unpaid time to the services provided by the Charity. The estimated volunteer time for the period amounted to approximately 3,500 hours (2021: 3,200 hours), totalling an estimated £56,000 (2021: £51,200), which has not been reflected in the Statement of Financial Activities in accordance with the Charities SORP (FRS 102).

## Notes to the Financial Statements - For the year ended 31 March 2022

## 9. Tangible fixed assets

	Office Equipment and Furniture	Total 2021
	£	£
<b>Cost</b>		
As at 01.04.21	6,032	6,032
Additions	-	-
<b>As at 31.03.22</b>	<b>6,032</b>	<b>6,032</b>
<b>Depreciation</b>		
As at 01.04.21	2,267	2,267
Charge for year	1,508	1,508
<b>As at 31.03.22</b>	<b>3,775</b>	<b>3,775</b>
<b>Net book value</b>		
<b>As at 31.03.22</b>	<b>2,257</b>	<b>2,257</b>
<b>As at 31.03.21</b>	<b>3,765</b>	<b>3,765</b>

## 10. Debtors

	2022	2021
	£	£
<b>Debtors</b>		
Debtors	312,031	172,719
Accrued Income	31,952	-
	<b>343,983</b>	<b>172,719</b>

## 11. Creditors: Amounts falling due within one year

	2022	2021
	£	£
<b>Creditors</b>		
Creditors	1,231	402
Accruals and deferred income	367,324	514,256
Other tax & social security	15,856	-
Other creditors	1,836	-
	<b>386,247</b>	<b>514,658</b>

## 12. Related party transactions

There were no related party transactions during the year. (2021: None.)

Remuneration paid to key management personnel is disclosed in note 8.

## 13. Reconciliation of net income/(expenditure) to net cashflow from operating activities

	2022	2021
	£	£
<b>Net income for the period as per the Statement of Financial Activities</b>	468,185	244,681
Adjustments for:		
Depreciation charges	1,508	1,508
(Increase)/decrease in debtors	(171,264)	148,134
(Decrease)/increase in creditors	(128,411)	118,318
Interest from investments	(1,878)	(878)
<b>Net cash generated from operating activities</b>	<b>168,140</b>	<b>511,763</b>

## 14. Operating lease

Dorset Mental Health Forum is due to pay the following future minimum lease payments under non-cancellable operating leases for which it is leasing, for each of the following periods:

	2022	2021
	£	£
<b>Payments:</b>		
Within one year:	1,181	264
Due in two to five years	3,837	-
<b>Net cash generated from operating activities</b>	<b>5,018</b>	<b>264</b>

## 15. Statement of funds

	Balance 01.04.21	Income	Expenditure	Transfer	Balance 31.03.22
	£	£	£	£	£
<b>Unrestricted funds</b>					
General funds	179,097	111,290	(48,748)	-	241,639
<b>Designated funds</b>					
Charity development	25,000	-	(3,600)	-	21,400
Digital development	15,000	-	(4,650)	-	10,350
Evaluation activities	25,000	-	-	-	25,000
<b>Total Unrestricted funds</b>	<b>244,097</b>	<b>111,290</b>	<b>(56,998)</b>	<b>-</b>	<b>298,389</b>
<b>Restricted funds</b>					
Advocacy	27,461	174,057	(132,468)	-	69,050
Employment	39,775	-	-	-	39,775
Community development	64,630	-	-	-	64,630
WaRP	307,635	1,059,557	(763,588)	-	603,604
DMH Carers Project	3,288	3,000	(1,095)	-	5,193
Sports and Social	1,846	1,480	-	-	3,326
National Lottery	104,158	95,500	(118,082)	-	81,576
Talbot Village Trust	-	99,696	-	-	99,696
Lloyds Bank Foundation	4,164	-	(4,164)	-	-
<b>Total Restricted funds</b>	<b>552,957</b>	<b>1,433,290</b>	<b>(1,019,397)</b>	<b>-</b>	<b>966,850</b>
<b>Total funds</b>	<b>797,054</b>	<b>1,544,580</b>	<b>(1,076,395)</b>	<b>-</b>	<b>1,265,239</b>

### Restricted Funds

- Advocacy funding was provided by Dorset County Council, Bournemouth Borough Council, BCP Council and Dorset HealthCare University NHS Foundation Trust (DHC) for the provision of Advocacy services for people subject to the Mental Health Act 1983 and people experiencing mental health problems in Dorset.
- Employment funds are held to provide employment related activities to individuals and local employers in Dorset.
- Community development funds (previously named Social Inclusion) are held for projects to be started in the future.

## 15. Statement of funds (continued)

- The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised partnership between Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust which puts lived experience expertise at the heart of service design and delivery, to transform services and affect culture change. Funding supported over 35 different partnership projects and work streams during the year. The Recovery Education Centre (REC), Dorset Work Matters, the Discovery Project and the Retreats were four of these projects.
- Active Dorset grant received for set up and delivery of DMHF Climbing Satellite Club as part of the Forum's Sports and Social Programme.
- National Lottery Community Fund grant received to influence and facilitate culture change around mental health across the whole of Dorset, by building capacity within communities.
- Lloyds Bank Foundation grant received towards salary costs for interim senior transformation post to develop capacity within the organisation.
- Funds received and administered for the independent Dorset Mental Health Carers Project, supported by the Dorset Mental Health Forum.
- Talbot Village Trust grant awarded for a two year project to provide Recovery Education and build capacity within local communities across South East Dorset.

### Designated Funds

- Designated Charity development funds are held for the specific purpose of meeting expenditure directly related to the development of the Charity.
- Designated Digital development funds are held for the specific purpose of meeting expenditure directly related to digital transformation work within the Charity.
- Designated Evaluation activities funds are held for the specific purpose of meeting expenditure directly related to evaluation activities within the Charity.

## 16. Analysis of net assets between funds

	Unrestricted Funds	Restricted Funds	Total Funds 2022	Unrestricted Funds	Restricted Funds	Total Funds 2021
	£	£	£	£	£	£
<b>Tangible fixed assets</b>	2,257	-	2,257	3,765	-	3,765
<b>Current assets</b>	332,648	1,316,581	1,649,229	255,061	1,052,886	1,307,947
<b>Creditors due within one year</b>	(36,516)	(349,731)	(386,247)	(14,729)	(499,929)	(514,658)
	<b>298,389</b>	<b>966,850</b>	<b>1,265,239</b>	<b>244,097</b>	<b>552,957</b>	<b>797,054</b>

# 17. Statement of funds for the year ended 31 March 2021

	01.04.20	Income	Expenditure	Transfer	31.03.21
	£	£	£	£	£
<b>Unrestricted funds</b>					
General funds	123,663	126,214	(77,087)	6,307	179,097
<b>Designated funds</b>					
REC	12,000	-	-	(12,000)	-
Sport and Social	7,000	-	-	(7,000)	-
Charity Development	20,000	-	-	5,000	25,000
Digital Development	20,000	-	-	(5,000)	15,000
Evaluation activities	-	-	-	25,000	25,000
<b>Total unrestricted funds</b>	<b>182,663</b>	<b>126,214</b>	<b>(77,087)</b>	<b>12,307</b>	<b>244,097</b>
<b>Restricted funds</b>					
Advocacy	10,140	174,059	(156,738)	-	27,461
Employment	39,775	-	-	-	39,775
Community development	64,630	-	-	-	64,630
WaRP	98,628	696,804	(487,797)	-	307,635
Sports and Social	248	5,980	(4,382)	-	1,846
National Lottery 1	139,831	105,500	(128,866)	(12,307)	104,158
National Lottery 2	-	30,400	(30,400)	-	-
Lloyds Bank Foundation	14,500	-	(10,336)	-	4,164
DMH Carers Project income	1,958	3,000	(1,670)	-	3,288
Dorset CCG	-	44,190	(44,190)	-	-
<b>Total restricted funds</b>	<b>369,710</b>	<b>1,059,933</b>	<b>(864,379)</b>	<b>(12,307)</b>	<b>552,957</b>
<b>Total funds</b>	<b>552,373</b>	<b>1,186,147</b>	<b>(941,466)</b>	<b>-</b>	<b>797,054</b>

# Reference and Administrative Details

## Trustees

Ann Abraham (Chair)  
Chris Balfe  
Rosanna Dean  
Peter Lovibond  
Arthur Merchant  
Sarah Murray  
Jan Owens (retired November 2021)  
Davide Rodrigues

## Chief Executive

Becky Aldridge

## Principal Office

Dorset Mental Health Forum  
29/29A Durngate Street  
Dorchester  
Dorset  
DT1 1JP

## Senior Statutory Auditor

Alexandra Shore FCA CTA DChA  
A C Mole  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX

## Bankers

National Westminster Bank Plc  
Dorchester Branch  
49 South Street  
Dorchester  
Dorset  
DT1 1DW





**The collective voice of lived experience**

29A Durngate St, Dorchester DT1 1JP  
01305 257172  
[www.dorsetmentalhealthforum.org.uk](http://www.dorsetmentalhealthforum.org.uk)

**DORSET MENTAL HEALTH FORUM**

England & Wales - Charity number 1169215

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# Accounts

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**Dorset Mental Health Forum**

**Annual Report and Financial Statements**

**For the Year Ended 31 March 2021**

**Charity Registered in England and Wales Number: 1169215**

**Dorset Mental Health Forum**  
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**For the year ended 31 March 2021**

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**Dorset Mental Health Forum**  
**Reference and Administrative Details**  
**For the year ended 31 March 2021**

**Trustees**

C Balfe  
J Owens  
A Abraham  
G D Rodrigues  
A Merchant  
P Lovibond  
R Dean  
S Murray (appointed February 2021)

**Chief Executive**

R Aldridge

**Principal Office**

Dorset Mental Health Forum  
29/29A Durngate Street  
Dorchester  
Dorset  
DT1 1JP

**Senior Statutory Auditor**

Alexandra Shore FCA CTA DChA  
A C Mole & Sons  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX

**Bankers**

National Westminster Bank Plc  
Dorchester Branch  
49 South Street  
Dorchester  
Dorset  
DT1 1DW

**Dorset Mental Health Forum**  
**Trustees' Report**  
**For the year ended 31 March 2021**

The Trustees have pleasure in presenting their annual report and the financial statements for the year ended 31 March 2021. The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Constitution and the Charities Act 2011.

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

**Governing Document and Constitution**

Dorset Mental Health Forum is a registered Charitable Incorporated Organisation (CIO) in England and Wales, Charity number 1169215. The CIO's principal office is 29/29A Durngate Street, Dorchester, Dorset, DT1 1JP. It is governed by its Constitution which was originally adopted on 16 September 2016 when the CIO was first established. The Dorset Mental Health Forum, Charity number 1073818, transferred all assets, liabilities, activities, staff and undertakings to the new Dorset Mental Health Forum CIO on 31<sup>st</sup> March 2017.

**Recruitment and Appointment of Trustees**

Appointment of Board members ("Trustees" for Charity legislation purposes) is governed by the Constitution of the Charity. The Trustees are authorised to co-opt new members on to the Board to fill vacancies in order to ensure adequate representation and diversity. The Charity reviews and develops the Board of Trustees on an ongoing basis.

The following people were Trustees of the Charity during the year:

A Abraham Chair from November 2020  
C Balfe (Resigned as Chair in November 2020)  
J Owens  
G D Rodrigues  
A Merchant  
P Lovibond  
R Dean  
S Murray (Co-opted in February 2021)

None of the Trustees has any beneficial interest in the Charity.

During 2020/21, Chris Balfe stood down as Chair. Ann Abraham was appointed as Chair, following an internal recruitment process, in line with the Charity's Constitution.

The Forum's Board of Trustees is responsible for the overall governance and strategic direction of the Charity. The Chief Executive is accountable to the Forum's Board of Trustees. During 2020/21 and the COVID-19 pandemic, all Trustee and Board activities were able to be carried out virtually, with minimal disruption to business.

**Induction and Training of Trustees**

New Trustees undergo an induction period in which they become familiar with the activities of the organisation, core values, governance processes of the Charity, the structure of the organisation and the role of Trustees.

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**Induction and Training of Trustees (continued)**

New Trustees are co-opted and undergo this familiarisation period with support and mentoring as required, before they are formally elected as new Trustees at the Annual General Meeting. Once appointed, new Trustees keep themselves apprised of new guidance notes issued by the Charity Commission and other agencies.

During 2020/21, we have continued to review and strengthen the Charity's governance structure. Trustees meet quarterly for Board meetings to discuss the business and governance of the organisation. This includes developing strategy, risk management and reviewing operational and financial information for the Charity. The Finance and Audit Committee and the Appointments and Remuneration Committee also meet quarterly during the year, feeding directly into Board meetings as part of a programmed Board cycle.

Trustees are included and encouraged to participate in whole team building events and Forum activities, as well as to undertake training and attend Recovery Education Centre courses. The Forum provides full indemnity insurance for its Trustees.

**Board Development**

Development work is ongoing with the Forum Board to build resilience and sustainability for the organisation for the future. Diversity of experience and perspective and the required skill set of the Board is reviewed at regular intervals. The Charity sees review, appraisal and development of the Board and its effectiveness as an ongoing and essential process, utilising the tools and resources available from the sector. The Board has regular Away Days to spend specific time on development of Trustees, the Board and strategic issues. The Board continues to utilise sector resources to review and inform performance and appropriate governance of the Charity. This includes the updated Charity Governance Code (2020) and the related NCVO Governance Wheel Toolkit (2021).

**Investment Powers**

The Constitution authorises the Trustees to use all money raised to further its Objects and to do all things that are lawful and conducive to the attainment of those Objects and does not prevent investment.

**Investment Policy**

Management of cash reserves is governed by the Investment Policy, which establishes the Charity's investment objectives (in order of priority) as:

- (1) capital preservation;
- (2) liquidity; and
- (3) income generation.

The Policy prohibits investment in instruments which do not guarantee principal repayment and controls credit risk, with bank counterparty limits approved by the Finance and Audit Committee.

Liquidity is ensured by specifying a minimum balance to be retained in instant access bank accounts, with a complimentary limit on the average term or notice period for other deposits. Within these parameters, the Finance Team has delegated authority to manage the Charity's current and deposit accounts to maximise interest income, as far as consistent with limiting operational risk. This means that sufficient funds are available at any one time to ensure that the Charity can meet all its liabilities.

The Investment Policy is approved by the Board and monitored by the Finance and Audit Committee.

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**Risk Management**

The Trustees acknowledge their responsibility to give due consideration to the risks to which the Charity is exposed and have put in place processes to identify and manage risks through Risk Registers. Risks are regularly reviewed, assessed, managed and escalated appropriately in accordance with the Risk Management Policy.

The Trustees have given due consideration to the major risks to which the Charity is exposed and are satisfied that systems, processes and procedures are established in order to manage these risks. Risk management processes are in place and continue to be developed as required throughout the organisation. The Forum is committed to the continuous improvement of practices and procedures, including identifying improvements to risk management processes. These include the ongoing development of internal control systems, which enable the Senior Leadership Team and Trustees to identify, manage and satisfactorily control risk exposures.

The Board is enabled to regularly review organisational priorities, associated risks and mitigating factors. Internal audit mechanisms continue to be reviewed and further established, building on the continuous development of the Charity's financial controls.

During 2020/21, work has continued to strengthen governance arrangements across the organisation to further develop and enhance existing processes and procedures, such as financial management systems, risk management processes and ongoing development of the Charity's CRM (Customer Relationship Management) system. Board committees provide further scrutiny and information for the Board, supported by voluntary Governance Partners who work alongside Trustees, adding valuable capacity to the Charity's governance processes and activities.

**OBJECTIVES AND ACTIVITIES**

**Statement of Purpose**

The Forum Charity is governed by its Constitution and the Objects of the CIO are:

To promote and protect mental health for the public benefit, including but not exclusively by:

- a) Supporting the recovery of people experiencing mental distress, by creating opportunities for people to reconnect with their own strengths and resources, in order to build the lives they wish to live.
- b) Challenging discrimination against people experiencing or affected by mental distress by modelling the value of lived experience expertise, including representation and involvement in the improvement and shaping of mental health services.
- c) Advancing the education and understanding of the general public in all areas relating to mental health by promoting the principles of mental health, Wellbeing and Recovery through Coproduction and Recovery Education.
- d) Developing the skills, capacity and opportunities to build socially inclusive, equitable and reciprocal communities which actively support good mental health.

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**Summary of Charitable Activities**

The Forum's Objects describe the organisation's charitable activities.

The Charity fulfils its Objects in line with the Forum's ethos and beliefs.

- We believe that people with lived experience of mental health problems have a wealth of specialist knowledge and valuable expertise.
- We believe in the effectiveness of partnership working in the design and provision of mental health services.
- We believe that everyone has an equal right to enjoy the opportunities that life can provide.
- We believe there is 'no health without mental health' and that 'mental health is everyone's business'.
- We promote the principles that hope, mental health and wellbeing are essential to every person.
- We believe that individuals and communities hold many of their own solutions.

*"Recovery is not about 'getting rid' of problems. It is about seeing people beyond their problems - their abilities, possibilities, interests and dreams - and recovering the social roles and relationships that give life value and meaning."*  
(Repper and Perkins, 2003)

**Public Benefit**

The Dorset Mental Health Forum is a local peer led Charity, which understands and values the voice of people with lived experience of mental health problems. Together, we educate and enable, promoting Wellbeing and Recovery, influencing change and offering a range of specialist independent and partnership projects. Our purpose is to increase understanding of mental health and challenge prejudice against people experiencing or affected by mental distress, by facilitating evolutionary social change across Dorset.

The Trustees have paid due regard to the Charity Commission's guidance on public benefit in deciding the activities undertaken by the Charity during the year. The Trustees are satisfied that the information provided in the Trustees' report and accounts meets the public benefit reporting requirements.

Trustees understand the difference made to the lives of the Charity's beneficiaries, as well as to society for public benefit. The Forum's beneficial purpose and activities are as stated above. The Forum's workforce models, facilitates and provides hope, opportunity and understanding around mental health throughout all of its projects and activities. This has enormous impact for people who experience mental illness and who have direct contact with any of the Forum's workforce and operational activities, as direct beneficiaries. In addition to this direct benefit, the Forum's activities also raise awareness, challenge stigma, influence culture and change behaviour within individuals, organisations, local communities and service systems, for public benefit in Dorset and beyond.

**Policies**

The Forum is committed to the continuous improvement of practices, policies and procedures and continues to review and update policies and procedures as required and on an ongoing basis. Trustees have reviewed the Register of Policies during the year and as a result several policies have been updated during the course of the year.

The Charity began the NCVO Trusted Charity Quality Standard journey during 2020/21. This set of quality standards specifically designed for charities was formerly known as PQASSO.

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**ACHIEVEMENTS AND PERFORMANCE**

The Charity has performed its charitable activities and continued to achieve against its objectives during 2020/21.

During the year, the Charity has been able to maintain its financial position and increase impact, as well as undertake consolidation, longer term strategic planning and transformation activities.

**COVID-19**

The Forum's activities over the last year have been largely shaped by the pandemic, which has brought a range of challenges, accelerated transformation and also presented opportunities. Our work during 2020/21 has been broad as we have adapted to continual changes and restrictions, redefining our offer to support local people and services to best meet beneficiaries' needs and to support our NHS partners and the wider Dorset System. We have been able to do this within existing and continuing resources, developing a range of projects in response to the new landscape.

As a System partner, the Forum has welcomed being able to pull together with other local organisations during this time, to support and equip local people and communities to develop literacy, tools, personal resources and understanding, enabling them to cope with increased levels of emotional distress and mental ill health and to reframe their experiences of loss and trauma. We believe that paying attention to parity during this time has been important, bringing both physical and mental health together with the same focus to achieve equitable perspective and experience. During 2020/21, we have been able to develop specific workstreams around traumatic bereavement and understanding deepening inequalities.

Fear, loss and isolation have been themes that have united us all. Key workers across Dorset have had to deal with situations that have stretched them to the very limits of their wellbeing. We have been able to share our lived experience expertise to support people's wellbeing and enable Recovery, offering organisational peer support across the System in Dorset. During this time, we have supported beneficiaries to adapt to different ways of accessing support, acknowledging the impact of digital poverty, supporting the development of technological literacy and building confidence, by helping people to identify their own strengths and resources during these challenging times.

During 2020/21, the Forum has carried on developing its collective voice of life and lived experience, further growing as a constituency of people with their own lived experience of mental health problems, experiences of accessing statutory mental health services and personal narratives of trauma. We have remained committed to amplifying the voices of people who have been impacted by poor mental health and trauma, modelling these experiences as strengths rather than deficits, promoting the philosophy that Recovery is possible for all. Our organisation continues to work collectively and representatively to enable and promote Recovery across Dorset, informing and shaping local service transformation, design and delivery.

Recovery is at the heart of all that we do, enabling and promoting the value and efficacy of people doing for themselves what they have traditionally been reliant on services to provide, encouraging an environment where people work in partnership with the providers of their care, in order to enable them to live the lives they wish to live. As demand on statutory organisations increases and national policy drives forward an agenda of whole system approaches, we have continued to build our reputation as a credible and professional organisation. Our unique position within the local mental health system allows us to represent and influence from a lived experience perspective at all levels of system transformation and service delivery, building our workforce and our constituency, bringing people who access local services, their supporters and carers alongside statutory services, principally the local NHS and local government departments. Getting alongside local services enables us to act as a "critical friend" supporting and informing the evolution, shaping and design of local services for public benefit.

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We have continued to evolve and strengthen our lived experience expertise and infrastructure, by creating opportunities and mechanisms for people to make sense of and reframe their experiences, as well as to share their learning to increase understanding and influence social change. Through lived experience expertise and coproduction, we continue to bring an alternative perspective around mental health to local services and communities, challenging stigma and the practice of pathologizing emotional distress. This has been particularly important in the last year, as our colleagues in health and social care have stepped up to save lives and we have stood together with our community to do whatever we could to ensure that people who experience mental health issues in Dorset were not disproportionately impacted or neglected in this time of national crisis.

The Forum's charitable activities and achievements during the year include:

**Dorset Wellbeing and Recovery Partnership**

The Forum has a formal partnership with the NHS locally called the Dorset Wellbeing and Recovery Partnership (WaRP). Established in 2009, this is a formal partnership between the Dorset Mental Health Forum and Dorset HealthCare. The Partnership is nationally recognised for its expertise in Coproduction, Recovery Education and facilitating capacity building, within services, local communities, organisations and systems.

The Partnership has been pivotal in the growth of the Forum and has provided the opportunity for the Forum to work at many levels throughout the NHS locally - informing, challenging and shaping services, enabling Lived Experience expertise to be incorporated into all levels of local service shaping, design and delivery. This work is on-going and will be for the foreseeable future as local services, systems, culture and ways of working are transforming. The Forum is able to act as a critical friend and valued System partner in the developing Dorset Integrated Care System (ICS), ensuring that lived experience expertise is incorporated within local service review, design and provision. In the last couple of years, the voice of lived experience expertise has been further embedded within the governance and development of integrated mental health services in Dorset, which ensures that local transformation and investment is agreed from a commissioner, provider and lived experience perspective, guided by the principles of Coproduction. Many of the activities and achievements described in this report are directly attributable to the work of the Dorset Wellbeing and Recovery Partnership.

During 2020/21, the work of the Partnership has enabled the Forum to work collaboratively across the Dorset System to respond to the pandemic, as well as rapidly mobilise digital and alternative forms of support for people experiencing acute distress and accessing local Mental Health Services. COVID-19 meant that many services were adapted or reduced overnight as face-to-face interactions were withdrawn and NHS staff were redeployed in response to the pandemic. Through the Partnership and our Lived Experience infrastructure, the Forum has been able to work to ensure that people's voices have been acknowledged and heard during this challenging time of change, informing and shaping provision as far as possible during this crisis.

During 2020/21, the Partnership has matured as a System partner, working more closely with different parts of the System. We have built stronger and more sustainable relationships with both Local Authorities, Education, Public Health, a range of NHS commissioners, local Acute Hospital Trusts and some Primary Care Networks (PCNs).

Through its projects, during the year, the Forum has developed a number of broader partnerships across the Voluntary, Community and Social Enterprise (VCSE) sector in Dorset, acknowledging that collaboration is the best way to ensure that there is no wrong door for people, as we begin to intentionally address widening health and economic inequalities for people in Dorset.

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Dorset is currently undergoing a review of community mental health service provision, known as the MHICC (Mental Health Integrated Community Care). The driver for this work was outlined in the NHS Long Term Plan in 2019 and was strengthened in the NHS White Paper: *Integration and innovation: working together to improve health and social care for all*, published in February 2021. During 2020/21 we have worked across primary and secondary mental health services to explore opportunities for better integration, ensuring that the voices of more marginalised people are amplified, so that bold and necessary change is taken to ensure that all people who experience mental health issues are fully and appropriately enabled to build their lives beyond mental health services and to flourish in their local communities.

Despite the challenges presented by COVID-19 and the restrictions in place throughout local Mental Health Services, we were able to continue to offer a range of options for people to access Lived Experience expertise within services. Working in partnership with Inpatient Units, Community Mental Health Teams and services such as Perinatal, Criminal Justice, Rehabilitation and Older People's inpatient units, we have cocreated digital and remote resources that can be delivered by Peer Specialists or used to add capacity to staff within these service areas.

During 2020/21, we have continued to be actively involved in a range of different Partnership projects, work streams and Coproduction activities throughout Dorset HealthCare and across the System. We have delivered over 20,000 hours of Lived Experience expertise in Partnership activities with our NHS colleagues. Adapting our activities and developing a range of digital resources has enabled over 18,000 interactions with people across a range of digital platforms during the year.

This year has had a significant impact on young people, with school closures and social interaction restricted. We have worked very closely with Child and Adolescent Mental Health Services (CAMHS) to begin to enable a different response to people's emotional distress and trauma. Developing mechanisms for young people to have a voice and listening to their experiences, we have been able to act as a bridge with services improving experiences, but also enabling young people to identify their own strengths and resources, so that they do not become reliant on Mental Health Services to thrive. This work has broadened into working alongside our Local Authority colleagues and Educational Psychologists to create a shared language and literacy that aims to normalise emotional distress as part of the human experience, rather than something that needs to be "fixed".

The Partnership's expertise in Recovery for Organisational Change and Coproduction meant that we were invited to support and inform the local COVID-19 crisis response early on, engaging in activities designed to support staff wellbeing and the development of bereavement support across Dorset.

Inevitably, staff wellbeing has been a strong focus during 2020/21. We have undertaken a range of activities to support our own staff and NHS colleagues, including delivering digital drop-in sessions and learning sets focused on self-management and maintaining wellbeing, as Dorset has come together as a System to develop an enhanced offer of support for all NHS staff and Key Workers. During the year, we have worked directly with over 260 staff, offering remote resources for many more through Recovery Education and Discovery Project activities. We have continued to support the NHS Lived Experience movement in Dorset (now called Open Minds, previously known as Hidden Talents), ensuring that NHS staff and colleagues are able to share their experiences of trauma and mental health issues safely and without stigma or prejudice.

During 2020/21, we have seen communities come together in unprecedented ways, creating innovative solutions and developing micro projects and grass roots initiatives, locality by locality and sometimes street by street. The Forum and the Partnership have welcomed this way of working and been able to progress collaborative working initiatives. We have worked with over 75 local VCSE and community groups to ensure that we are building on the assets that already exist in communities, developing capacity where it is most valuable for people themselves.

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We have delivered Recovery for Organisational Change work with partner agencies during 2020/21. This includes the Charity Help and Care who have become the main employer of non-clinical workforce across Dorset. We have worked with Help and Care to deliver a Recovery and Wellbeing Masterclass with their Board of Trustees, followed by co-delivered Mental Health and Emotional Wellbeing training across their organisation's team structures, sharing our experiences and learning to help them to create a culture that better understands and supports wellbeing in their workplace. We have also worked with a range of organisations as part of the Advice Dorset Collaborative, ensuring that they are equipped to offer signposting, advice and guidance to people who experience mental health issues, within a proven and acknowledged set of principles and values.

**Dorset HealthCare Quality Improvement (QI) Activities**

During 2020/21 we have worked alongside Dorset HealthCare's Quality Improvement (QI) team, ensuring the experiences of staff and patients are at the heart of service delivery:

- *Kimmeridge Court Eating Disorders Unit* - Supporting the team to understand why there was a decline in attendance for ward activities and therapeutic sessions. We worked together on engagement activities to ensure that the voices of people who accessed the services were being heard. This has led to a change in service provision and how staff are gathering feedback from people during their stay in the Unit.
- *Wimborne Older Persons CMHT (Community Mental Health Team)* - Supporting the psychiatrist and the team to learn more about how well their service was doing in meeting the needs of their clients. Around 75% of clients have a diagnosis of dementia and the team were keen to explore innovative ways to engage with people and their families. Our Peer Specialist Carers were also involved in this work, to ensure people were thinking about families.
- *Perinatal website for patients and carers* - Supporting the development of a website for patients and for professionals. We consulted with a range of people who had accessed services to understand what they would have found helpful and developed a 360 degree tour from that feedback.

During the year we have run 18 Quality Improvement workshops with Dorset HealthCare staff, including Triangle of Care and ImROC (Implementing Recovery for Organisational Change) learning sets. Two workshops were specifically with the QI team and included 20 peer staff and Experts by Experience, for the purpose of building literacy around Quality Improvement methodology and enabling more meaningful lived experience input into Quality Improvement activities across Dorset HealthCare and the wider System.

**Recovery Education Centre (REC)**

The Recovery Education Centre sits at the heart of the Partnership work and aims to provide a learning experience focused on promoting Wellbeing and Recovery, which is accessible for all people in Dorset. Courses and resources are codesigned and codelivered, by putting Lived Experience expertise alongside clinical or technical expertise, enabling people to make sense of and reframe their experiences of mental ill health, trauma and emotional distress. Students are able to find hope, identify strengths and build skills beyond clinical intervention. The REC partners with other organisations such as the Police, Social Care, Rethink and Cruse to develop courses and resources.

In person delivery of the REC was not possible during most of 2020/21, due to COVID-19 restrictions. This meant a wholesale shift to rapid generation of coproduced digital resources and online delivery, including podcasts, videos, standard webinars, enhanced webinars, workbooks and virtual study groups.

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During the year, people have been able to engage in Recovery Education through a variety of open access resources available online and through the REC social media channels, as well as by joining live interactive Recovery Education webinars. The team have also been able to make paper-based workbooks available to people without access to the internet. The REC admissions processes were moved online with telephone appointments offered for people impacted by digital poverty or who lacked confidence in digital engagement. Digital platforms have enabled us to grow our reach rapidly and created opportunities for the team to engage with a new student cohort, as well as continue to meet the needs of existing students.

During 2020/21, the REC coproduced 38 different podcasts across 12 different topics. These podcasts have been listened to 4,063 times. We have delivered 450 live and interactive learning sessions during the year. The REC now has 5,558 registered students, although reach has expanded well beyond registrations with more people choosing self-directed learning opportunities. There were 11,429 interactions with the REC website pages, with 1,212 people downloading specific resources.

This shift in approach has enabled us to work across services to enhance access for people to Recovery Education. Working closely with Community Mental Health Teams, Inpatient wards and across specialist Mental Health services, we have been able to provide Recovery Education resources, as well as increased support for staff to deliver sessions, ensuring that people accessing services still have options, in spite of the COVID-19 restrictions.

***Feedback and Reflections***

*“We have started sending out emails to clients with a variety of online resources including the REC podcasts. This has enabled people to access the information almost instantly, which can be especially helpful in times of crisis when they have contacted our duty worker.*

*It has also been helpful for people with limited literacy skills to access this information and gives people a good introduction to some of the topics and the remit of the REC, especially if they are at a point in their Recovery journey where they do not feel able to engage with more formal online sessions.*

*We have had some clients who have reported that they now feel more confident to access REC courses as a result of engaging with the podcasts. One lady signposted some of her friends and family to the site as she felt they would benefit both for themselves and in terms of supporting her.”* **CMHT Staff**

*“Where do I start? I love the webinars!... mostly the friendliness of the REC facilitators, but also seeing and sharing with other participants ..... really helps to make me feel not so alone and isolated.”* **REC Student**

**Dorset Open Door**

Dorset Open Door is a partnership of local and national bereavement charities and health and care organisations working together to make sure people get the support they need. In June 2020, as the significant impact of COVID-19 was being realised, the Dorset Wellbeing and Recovery Partnership was commissioned by Dorset CCG (Clinical Commissioning Group) and Public Health to create a Bereavement signposting and support service to offer enhanced support to people.

The purpose of Dorset Open Door is to bring together the expertise of individuals, communities and services which support people in Dorset who are traumatically bereaved by COVID-19 or suicide, to enable people to get the support that they need, at the right time, by the right people. This support might be practical, emotional support or counselling, courses, peer support or opportunities to commemorate or remember their loved one. As a needs-led initiative, an important part of the project is also mapping unmet need across Dorset.

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The Dorset Open Door aims are:

- To create a cross organisational, consistent and collaborative approach that will reach and outreach to people in Dorset who have been traumatically bereaved by COVID-19 or suicide.
- To supplement existing services expertly offered by these organisations, by using a Recovery Education based approach, to enable people to explore their options in relation to their own strengths and resources and to identify what local provision will most appropriately meet their needs as they are grieving.
- The Dorset Open Door does not replace existing entry pathways for people accessing bereavement support directly from providers, instead it aims to work with individuals to identify and access support.

Key to the success of this project has been collaboration and engagement across a whole range of organisations to ensure a “no wrong door” approach, bringing together collective expertise from across Dorset in the co-design.

Dorset Open Door is currently working with 19 organisations across Dorset and has received over 500 contacts for web-based information, as well as worked directly with 34 individuals.

***Case Study:***

*“A lady contacted Dorset Open Door following a suicide in her extended family. She was looking for support for herself and help with supporting her family through their grief. We discussed at length the range of supports available and what the family were currently accessing. From this conversation, the lady was reassured that they had found the right support for the young people via Mosaic and for the adults in the family via CRUSE and the GP. In addition, Dorset Open Door was able to signpost and support access to peer support (Dorset Mental Health Carers Project), as well as advice and guidance regarding the inquest (via the Coroners Court Support Service). Warm handovers were provided to ensure the lady experienced smooth access to additional support.”*

**The Discovery Project**

The Discovery Project was commissioned in 2019 and has enabled us to develop mechanisms that amplify the voices of young people who have experience of mental ill health, emotional distress and trauma in their lives. The aim of the Discovery Project is to improve resilience and coping for young people, their families and supporters, by increasing understanding around personal mental health and wellbeing and developing literacy in schools and youth organisations, through the delivery of Recovery Education.

This is a highly innovative project that has 4 distinctive strands of work:

- *Discovery College:* offers workshops across Dorset, providing opportunities to develop understanding around personal mental health and wellbeing and supporting others with their mental health and wellbeing. Aimed at those accessing or on threshold of accessing CAMHS.
- *Discovery Schools:* works with schools in Dorset to coproduce bespoke mental health and wellbeing support and education to support students, teachers, support staff, and parents/carers.
- *Discovery Digital:* provides additional education and engagement through digital media and platforms.
- *Discovery Activities:* works with activity providers and third sector organisations based in Dorset who offer activities to young people, helping them to promote wellbeing and offer support to those experiencing mental health challenges.

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As a result of COVID-19, the Discovery Project has had to work innovatively and responsively throughout 2020/21 with schools closing and many of our partner organisations losing direct contact with their young people for a while. In April 2020, the Discovery Project webpages and social media channels became the primary form of interaction with young people, as we worked with teams and partners to develop podcasts, videos and workbooks that would enable young people, parents and staff to access self-directed learning resources. During the year we developed 17 podcasts with over 1,042 listens and 24 videos with 3,769 plays.

We also directed our focus to staff development, coproducing training for services on talking to young people, integrating learning from the Project since its launch in 2019. During 2020/21, the Discovery Project has delivered training to 9 different teams within Dorset HealthCare reaching a total of 132 staff, as well as worked with 8 external organisations. We have had direct interaction with 32 young people and 7 parents with 5,640 digital interactions across webpages and social media.

The impact of COVID-19 on education has been significant. During the time that schools were closed, we worked with Local Authorities across Dorset to support the development of their “wellbeing in schools” initiative, developing literacy around self-harm and emotional distress, as well as supporting the agenda around staff wellbeing. We have worked with a total of 46 teachers and educational psychologists during the year.

We are expanding our Young Peer workforce and have developed pathways for young people to contribute to the development of resources and training during the year. We currently employ 7 Young Peer Specialists and are further developing our employability and skills programme, to ensure a focus on the development of transferable skills, to encourage our young peer staff to have aspirations, building their lives beyond mental health services.

*“I joined the Discovery Project to help socialise with others and to help me with my anxiety, to find new ways to cope and to meet others who are also struggling to understand that I'm not going through this myself.*

*I also wanted to find a way to help others out there that might not have anyone else. I learned a lot from this project and I'm so grateful for this opportunity. It has built my confidence and I have found new coping mechanisms, which has benefitted my well-being.”*

**Feedback from young person**

**Access Mental Health**

One of the most important developments in mental health service provision in Dorset over the past few years has been the Access Mental Health Pathway. We have been directly involved with the development of this work from its inception, which began with Dorset CCG's Mental Health Acute Care Pathway (ACP) Review in 2015. This coproduced piece of work realised the following criteria for the future development of local mental health services, as defined by the people of Dorset:

- Easier and earlier access to mental health support.
- Improved services for self-defined crisis, in safe place, with support from peers.
- Services that embodied person centred recovery focused approach.
- Community facing services, integrating mental health support within local communities.
- Consistent, equitable and accessible offer of service and provision across Dorset.

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Today's *Access Mental Health* consists of the 24/7 Connection crisis telephone service (delivered by Dorset HealthCare), two Retreats (delivered in partnership between Dorset HealthCare and Dorset Mental Health Forum) and four Community Front Rooms (delivered by Bournemouth Churches Housing Association (BCHA) in partnership with local charities Harmony and Hope).

The services across the Access Mental Health Pathway all operate to a set of values that ensure that the service offerings are completely accessible to people and that the person is enabled to self-define their crisis, rather than having to meet a threshold of crisis as defined by a clinician, before the person can access support. All of the services offer access to clinical expertise and lived experience expertise in varying degrees. During 2020/21, we have continued to provide support, but the impact of COVID-19 has been significantly felt across all areas of the Pathway.

At the beginning of the pandemic, the Retreats and CFRs (Community Front Rooms) were stood down to enable clinically led Emergency Assessment Units (EAU) to be set up in response to pressure on local acute hospitals. Whilst this decision was necessary to respond to the unprecedented challenges presented by COVID-19, it had a detrimental impact for many of our visitors, who were no longer able to access drop-in support and solely reliant on the Connection service for support and managing crisis. During this time, we worked with our partners to explore Lived Experience input into Psychiatric Liaison Services, offering people in the EAU's access to peer support. By the end of the first lockdown, it was evident that the Retreat and CFRs offered a different approach and that they should be reinstated.

Since June 2020, the Retreats have continued to deliver a blended offer of digital face-to-face appointments, virtual drop ins and face-to-face crisis support for people in acute distress. Drawing on content developed in the REC, responding to visitor feedback and testing new approaches, we have been able to maintain a quality service for people that retains the ethos of reciprocal engagement.

During the year, we have taken opportunities to deliver a range of inhouse and external training, upskilling staff across the whole pathway in digital communication and revisiting trauma informed approaches. We have also adapted approaches to staff support and supervision, ensuring that staff wellbeing continues to be a priority. In September 2020, the Retreat opening hours in East Dorset were temporarily extended from 12noon to 12midnight, in response to reduced service provision by local Community Mental Health Teams and following feedback from Police and Ambulance teams.

During 2020/21, the Retreats saw 258 emergency visitors, offered a total of 3,360 digital one-to-one appointments and virtual drop-in sessions and delivered training to 62 staff.

*"The patient's experience was very positive. He was very glad not to be sectioned but had been grateful to speak to a mental health professional. As a result of using the Retreat he now feels he has a more positive relationship with both the Police and Mental Health provision locally."* **Feedback from Police**

*"The Retreat in Bournemouth really helped my partner without realising it. My partner went missing leaving behind a suicide note to myself and his three children. He's 26-years-old. A Police officer had told him of the Retreat when they found him, which he loved the idea of. Unfortunately, it's not open right now but he braved a virtual drop in call, and it really did save his life, just that conversation and having the ability to come and talk whenever."* **Feedback from a family member**

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**Suicide Prevention**

Suicide prevention is an important priority for the Dorset System and 2020/21 saw the launch of a codeveloped multiagency pan Dorset Suicide Prevention Strategy. This Strategy includes a commitment to imbedding Lived Experience expertise across all associated workstreams, including ensuring that people who have survived suicide attempts and people who have lost a loved one to suicide, have the opportunity to share their perspectives and expertise. Central to this work is the intention to ensure that as an Integrated System we learn from what went wrong for people, focusing not just on keeping people safe, but on understanding what leads a person to consider suicide. This important workstream aims to help individuals at risk of suicide find hope for the future and belief that their life is worth living.

**Forum Sports and Social Programme / Building Connected Communities**

In our successful bid to the National Lottery Community Fund in 2018/19, we outlined a vision for building connected communities across Dorset. We made some good progress during 2019/20, but this area of our work has been at the core of our operations during 2020/21, as we have worked to respond to the loneliness and isolation people have felt across our communities during the COVID-19 pandemic.

During the year, we have further aligned the activities of our Sports and Social Programme with the objectives of our Building Connected Communities project, focusing on addressing social isolation by building integrated social networks within local communities and enabling opportunities for people to contribute within their local community. Intrinsic to this is building understanding and skills around mental health within local communities, so that they can become more inclusive, integrated and equitable.

During 2020/21, we have worked to ensure that people continue to have choice in accessing the programme and social interaction, whilst balancing this with COVID-19 restrictions and safety requirements, keeping people connected despite periods of lockdown and extreme isolation. To maintain a positive experience for members, we decided early on not to continue with indoor groups, but instead focused on being outside. We adapted groups to maintain social distancing, football became football drills, we introduced lots of walking groups, gardening groups and social groups in parks. When the numbers of people gathering were restricted, we ran our groups more than once to ensure we could continue to offer social interaction to members who needed it. During this time, we made more contact with members, ensuring they could make informed choices about attending.

For some more vulnerable people who were shielding, or living with elderly parents, or unable to travel safely, we introduced digital and remote activities, ensuring we kept everyone connected through regular phone calls, as well as texts or video-calls. During this time, we developed a range of online groups (book club, gaming group and Netflix group) which enabled people to remain socially connected.

Digital poverty was a real issue for some people. Some of our members struggle with technology or phone calls, so we have ensured that people have had choice about how they want to stay connected, but also signposted people to community initiatives arranged to address digital exclusion. In addition to this, we secured further funds from the National Lottery Community Fund as a result of COVID-19, to develop our engagement and digital offer.

During 2020/21, we made over 3,500 calls, offered 1,090 one-to-one sessions and ran 460 in person and digital group-based activities.

*"I would recommend the groups to anyone with any mental health issues. It is incredibly inclusive, non-judgemental and in my case, just helped me get out and socialise."*

**Feedback from Member**

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**Health Inequalities - SMI (Severe Mental Illness) Physical Health Checks**

During 2020/21 we were commissioned by Dorset CCG to support an initiative designed to tackle health inequalities for people with "severe mental illness" (SMI), by promoting and supporting physical health checks. People who experience serious mental illness are on average likely to die ten years sooner than other members of the general population for a range of reasons.

The NHS Long Term Plan (2019) lays out several steps to tackle this health inequality, including offering yearly physical health checks to all individuals listed on the SMI register. Whilst the principles behind this are sound, many people living with a severe mental illness are not taking up this opportunity. The SMI Physical Health Checks project aims to gain understanding around the barriers for people, gathering lived experience perspectives, as well as to develop Recovery Education resources to enable people to access support around their physical health. So far, we have worked with 37 individuals. Some of the barriers people have described are:

*"I have had too many medical people tell me what to do, including medication I don't want to take. I don't feel listened to."*

*"I am scared they will find something wrong with me."*

*"I don't go the GP, they don't really understand my mental health and I don't want to be told I have to stop smoking, I like smoking."*

**Perinatal Services**

During 2020/21 we have further developed our Perinatal Peer Support Project, blending digital and in person interactions, as COVID-19 restrictions have allowed. We are currently running a series of one-to-one peer support sessions within the service, that are framed within the principles of Recovery Education. In 2020/21, we worked with 14 individuals over 84 sessions and received 25 referrals for follow up support in the community. We are integrated into the team and attend the MDT (Multi-Disciplinary Team) meetings on a weekly basis, to act as a critical friend and ensure lived experience perspective is included in case review. Our Perinatal Steering Group enables us to gather broader perspectives and to link to our Sports and Social programme, creating opportunities for mums and babies to remain connected within their local community and to develop self-sustaining peer support networks outside services.

*"I found it very helpful to have contact with a Peer Specialist; it was helpful to know that someone else had experienced similar difficulties. I also felt able to talk about my issues without feeling judged. I was able to be open and honest, knowing it was confidential and the relationship felt very natural. During my appointments I felt I had another person to rely on, who was able to help me work through my thoughts and was able to tell me what they would feel like in my situation, which helped my understanding of mental health illness and how it can change your thought pattern to be different than others." Feedback from Mum*

**Community Mental Health Teams (CMHTs)**

During 2020/21, work within Community Mental Health Teams was significantly impacted by COVID-19 and the majority of client interactions were moved to digital and telephone support. This affected people in different ways and not all negatively. Some people felt more able to engage from the comfort and security of their own home, without pressure, other people felt that they needed support to build confidence in using digital platforms. Our Peer Specialists played a big role in supporting clients through this transition and added much needed capacity to CMHTs, both through maintaining telephone contact with clients and also by providing signposting to crisis support and Recovery Education.

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Peer Specialists within community teams act as a bridge with services by supporting individuals to reframe their experiences and to identify their own strengths and resources. This helps to facilitate meaningful collaborative care planning and enables a person to identify how they would like to build their life beyond mental health services. Over the year, we have worked alongside 6 CMHTs and 96 staff. We have offered 48 digital Recovery Skills sessions and worked with 177 individuals.

***Feedback from clients***

*“Using the skills, I have learnt in the workshops I can now sit with some of my uncomfortable experiences and wait for them to pass. I can use the skills I have learnt to soothe and calm myself. I now have a self-soothe space in my flat where I can go and find things that will help me.”*

*“Since attending the routine workshop I have thought about and identified different things I would like to do and been able to plan them in. My days feel busier, I am seeing other people and thinking about the next things I want to add.”*

**Criminal Justice Liaison and Diversion (CJLD)**

Following Dorset HealthCare’s successful bid to NHS England in 2019/20, to provide the CJLD service in Dorset, a pilot project has been created to explore the use of Lived Experience expertise within the service. This pilot has required a long period of scoping to understand the best and most appropriate way to utilise Peer Specialists within this service. We have been guided by the principles of Coproduction and our previous experiences of bringing Lived Experience expertise alongside professional expertise in many different services within Dorset HealthCare.

COVID-19 has had a significant impact on the project and the CJLD service itself, which has seen a sharp increase in referrals. Further impact has come from the closure of courts and minimal cases being heard, which has led to a huge backlog in the criminal justice system. The CJLD team are now supporting people whose cases will be postponed for many months. We are committed to doing what we can to amplify the voices of people who have been subject to police, court and prisons. We have strengthened links with our Advocacy Service during the year, as well as continued to develop collaborations with organisations such as Victim Support and the Footprints project.

We have continued to bring Lived Experience expertise to the service, although there have been limited opportunities for working directly with clients. During the year we have attended 11 MDT meetings, worked alongside 12 staff and provided one-to-one support for 5 individuals.

**Mental Health Rehabilitation Services**

Over the past two years, Rehabilitation services in Dorset have been subject to a large-scale review. This important workstream has explored the concept of Recovery for people with the most complex and enduring mental health conditions. The review concluded in 2020 and recommended the development of a community rehabilitation model, which included the development of Peer Specialist roles. During 2020/21, we have supported the recruitment and implementation of this team, including the co-development of training and induction for clinical staff and managers. The new service was launched in January 2021.

Peer Specialists in this new service have a specific focus around supporting individuals to identify vocational aspirations, build community connections and access Recovery Focused Education. Traditionally many people with more complex cognitive mental health issues have been underserved and the bar for what they can expect from life has been set too low. This important project challenges this misconception and encourages and supports people to build their lives beyond Mental Health Services.

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**Dorset Mental Health Carers Project**

The Forum has continued to support and develop the Dorset Mental Health Carers Project during the year, including developing the voice of carers. Many carers experience feeling isolated and lonely and COVID-19 has exacerbated this further. During the year, we have worked alongside our NHS colleagues to offer support specifically to carers who were also key workers during the pandemic, as part of the Staff Wellbeing initiative and Triangle of Care.

The Dorset Mental Health Carers Project carers support line has continued to offer support and signposting to carers in crisis and specifically supported 3 people who have been bereaved by suicide during the year. Many carers have reported a decline in their own wellbeing and were signposted to Steps to Wellbeing and GP services. During 2020/21, the carers support line received 57 calls from carers looking for peer support.

In December 2020 the Project hosted a two-day Carers Wellbeing and Mental Health Festival via Zoom for carers, which was well attended by carers, staff across Dorset and people from other areas of the country. We were able to arrange some valuable presentations from a range of organisations, establishing important links and relationships.

Peer Specialist Carers have supported the delivery of Recovery Education and Staff Training during the year.

*“I just want to say thank you very much for keeping contact with me and supporting me as well. Without the involvement with you and the work, I would have been very isolated and struggled even more. You have helped me feel connected and be part of something and I can't thank you enough for that, or your support when I've wobbled a bit.”*

**Feedback from carer**

**Steps to Wellbeing Service**

The Forum has a long-standing relationship with the Steps to Wellbeing (STW) service, which provides the Improved Access to Psychological Therapies (IAPT) services across Dorset. Previously, our Peer Specialists have supported delivery of psychoeducation and peer support within the service. However, during 2020/21 we have been delighted to support Dorset HealthCare with the development and recruitment of their own team of Peer Support Practitioners (PSPs). These are Dorset HealthCare's first NHS employed roles requiring intentional use of Lived Experience as part of their remit. During the year, we have worked collaboratively with the service in design of the role, recruitment, training and support processes that will enable the team of six PSPs to thrive as part of the broader Steps to Wellbeing teams.

During 2020/21, we have delivered training to over 240 staff across services in Dorset and Hampshire, attended 14 management development sessions and codesigned an eight-week programme of training that covered the core competencies of peer work within NHS settings.

We have also developed stronger links with our community programmes during the year, to enable pathways and support for people when they come to the end of their Steps to Wellbeing intervention, so that they can access community assets, social networks and broader opportunities as part of maintaining their wellbeing. Throughout 2020/21 we have received 56 referrals from the Steps to Wellbeing service for this valuable work.

*“This lady really struggled to engage before she met with you; there was something about the informal atmosphere and “coffee and chat” approach that really helped her to gain some confidence and open up a bit more.”*

**Feedback from STW Practitioner**

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**Primary Care Network Pilot**

In line with the NHS Forward View and the *General Practice Forward View*, improving care outside hospitals and integrating primary and community services is one of the headline commitments in the NHS Long Term Plan. In 2019/20, GP practices across Dorset joined together to form Primary Care Networks (PCNs) – groups of neighbouring practices typically covering local population groups of 30,000 to 50,000 people, to take a proactive approach to managing population health. During 2020/21, local PCNs assessed the needs of their local population to identify people who would benefit from targeted, proactive support.

One of the needs identified by The Blackmore Vale Partnership PCN was the need to offer a different type of support for people who were presenting with acute emotional distress. This pilot places a Peer Specialist in two local GP surgeries to offer peer support and signposting to crisis support, community activities and Advocacy. The aim of the pilot is to test the model, identify any emergent themes and add capacity to the team of Health Coaches, Link Workers and Social Prescribers working within the PCN by bringing Lived Experience expertise and Recovery Education to the team. Since January 2021, we have seen 23 individuals and worked directly with 14 staff working in primary care.

**Dorset Mental Health Advocacy Service**

The Forum provides the pan Dorset Independent Mental Health Advocacy service, primarily commissioned to support people who are detained and subject to the Mental Health Act (1983). We also provide general advocacy to people in the community with complex mental health issues. As with the rest of the Forum's projects, people's experiences sit at the heart of what we do. Advocating for people's rights and ensuring that no one is further disadvantaged or discriminated against due to their mental ill health, remains central to the ethos of the service. The issues that we have supported people with this year include Child Protection, housing issues, medication queries, debt issues and gaining access to treatment. During the year, the service dealt with 738 cases of which 523 cases were for people subject to the Mental Health Act (1983) and 215 cases were general advocacy. In addition, some of the team have been able to contribute to people's crisis response plans during the year, ensuring that people's wishes are acknowledged and represented.

Although COVID-19 changed the way the service has worked with people for most of the year, the team have been able to maintain contact with clients and inpatient wards via telephone and video conferencing throughout the year. Advocacy clients were impacted by the reduction in local services able to offer people support in their communities during the pandemic. In response to this, we developed some digital resources and information that enabled clients to better understand their rights and how they could access support digitally and online.

During 2020/21, we took the opportunity to develop some Advocacy training for our broader workforce, to ensure that all the Forum's activities are underpinned with an understanding of the principles of Advocacy and that people are supported and enabled to access early help for emergent issues.

*"The benefits system can be difficult to navigate, particularly in the realm of mental health. Having to constantly prove the effects of your condition every few years is stressful and emotionally taxing. The fear of losing support is always there. I feel for those people who struggle to communicate their illness or those who have to go through it all alone. No-one should lose the support they really need and are entitled to. For me the outcome was eventually positive. Even though I know I'll have to go through it all again in a few years I am in a better place. So, a massive thank you to my Advocate and the Dorset Mental Health Forum for being there when I needed it!"*

**Advocacy client**

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**Dorset Work Matters (DWM)**

The Dorset Work Matters IPS (Individual Placement and Support) Employment Service was formally launched during 2019/20. This service is delivered in partnership with Dorset HealthCare as part of the broader work of the Dorset Wellbeing and Recovery Partnership (WaRP). The Individual Placement and Support Employment Service (IPS) supports individuals accessing secondary mental health services into competitive paid employment, working with individuals and employers to build sustainable and supportive employment opportunities and culture change. The IPS approach ensures that anyone who wants to work has access to specialist support and is enabled to explore aspirations and opportunities as defined by them, rather than their diagnosis. The service facilitates employer engagement and enables broader understanding of mental health problems and the impacts of trauma within the workplace.

This employment project remains an important part of the Forum's social justice work, ensuring that employment and a person's right to actively participate as a citizen within their community is fully recognised and supported at the earliest point in a person's Recovery journey. In addition to this, the Forum continues to map the gaps around employment for people, developing a range of employment related activities that provide opportunity and choice for people in Dorset around employment and staying well at work. We believe that employment should be seen as a core component of active citizenship within local communities.

As an employer, our lived experience infrastructure provides a strong evidence base of the wealth of skills, resources and expertise that people who experience mental health issues bring to their work, particularly when their wellbeing is appropriately supported. During this year we have begun to integrate our organisational learning into the Dorset Work Matters project, as well as some of our other activities.

During 2020/21, the Dorset Work Matters project received 264 referrals, supported 61 individuals into work and worked with 71 people already in employment to support them in retaining their jobs.

*"I wanted to thank you for your help. I've found myself in a bad place and I felt that I was at a dead end in my life, with nowhere to turn with only one outcome. I reached out for help and you responded with perfect timing. You've helped me to see a way forward and you don't know just how much you've saved me. I won't ever forget your kind words to me and your amazing support. Please accept my thanks."*

**Dorset Work Matters client**

**Forum Workforce**

We believe that experiencing mental ill health and managing one's symptoms, should not preclude or diminish a person's right to enjoy all of the opportunities that life can provide, as with managing any physical health condition. This is one of the aspirations that sits behind all our work, along with a passionate desire to challenge the stigma, prejudice and discrimination that still exists around experiences of mental health problems. We have contact with many people who do not want to be defined by their illness or diagnosis, despite managing serious long-term conditions. Many people can lead meaningful and satisfying lives, others require more support to do so, often having been supported by services for most of their lives.

As an organisation built on the principles of creating opportunity and equality and understanding the impact of trauma in a person's life, we want to learn more about the impact of people's experiences of oppression and inequality. We are working intentionally to create pathways for a more diverse workforce that can represent all aspects of experience in our society.

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We continue to develop opportunities and pathways for employment, personal development, learning and peer networks for people with a broad range of experiences of mental health problems, trauma and access to local services. These opportunities are an important part of people's Recovery journeys, discovering and building skills and resilience to build the lives they wish to live, focusing on their strengths, rather than deficits, "what's strong, rather than what's wrong". As a Charity our workforce is our greatest asset and providing opportunities for people to reframe their experiences is core to our work. We continue to support people to develop an understanding of how they can safely and intentionally utilise the learning from their experiences to model Recovery, support others and bring about culture change.

Our courageous and inspiring workforce promote and model the principles of Wellbeing and Recovery in a variety of different roles and settings throughout the organisation, local services and across Dorset. Many of our staff are employed as Peer Specialists and engaged in Partnership work, with their employment an intrinsic part of their own Recovery journey. Creating a psychologically safe, values-based workplace remains paramount for undertaking our work and creating a healthy culture within our own organisation. During the last year, building capacity, resilience and sustainability has been priority work and this has enhanced our operational delivery considerably.

It is important to us to be continually learning from people's experiences and so we undertake regular staff surveys. These surveys are another way of understanding the experiences of our workforce, as well as helpful engagement mechanisms for the development of future activities and workstreams.

*"I feel extremely valued as an employee through the respect and compassion I have been shown with my own lived experience. With still so much stigma around mental health it's been so encouraging to be in a workplace where I'm treated with respect and appreciated for my lived experience. I have been shown huge amounts of compassion for the challenges I have faced in recent months."* **Staff member, 2020**

COVID-19 required us to rapidly adapt the way we developed and supported our people and teams, how we engaged with our beneficiaries and how we supported each other's wellbeing at work. Over half of our workforce were able to move to working from home immediately, due to recent digital transformation work, with further equipment, training and support provided so that people felt confident and competent. Some of our work did not translate easily to digital approaches, which was challenging for our teams, but together we continued to evolve our approaches and support each other with new ways of working. Commitment, innovation and creative problem solving across all of our teams enabled stronger internal communication channels and development of a robust architecture for the future. During the year, we held three virtual whole team away days, bringing all of our people together, which helped to ensure that even during periods of lockdown, people felt connected to their work and to each other.

During 2020/21, we provided 39,927 hours of lived experience expertise across a broad range of activities. Many of our workforce have experienced periods of crisis in their lives and the pandemic has seen our people step up with courage, tenacity, and compassion. As a Charity, it is a great privilege to have so many extraordinary people in our workforce bringing their whole selves to their work in this way. It is with tremendous thanks to our amazing workforce that we have continued to deliver our projects and serve so many of our beneficiaries during this challenging time.

### **Fundraising Activities**

The Forum does not actively undertake any direct fundraising activities and does not engage anyone to undertake such activities on its behalf.

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**FINANCIAL REVIEW**

**Financial Position**

The Forum has a range of funding streams, which include contracts and grants to provide specific services, as detailed in the financial statements, as well as funding from grant making bodies to fulfil our aims and objectives. In addition to this, the Forum continues to develop its social enterprise activities. Many of our activities are currently focused within the NHS and wider integrated system, in order to bring lived experience expertise and challenge on behalf of beneficiaries to the shaping and future design of local mental health services and beyond. As with many third sector and 'Not for Profit' organisations, our funding streams are timebound, which means continual review of funding strategy.

Maintaining independence as an organisation is vital in our work. We are delighted this year to have secured further short-term funding from the National Lottery Community Fund to meet our objectives in the context of the pandemic. Our fundraising strategy for the years ahead includes increasing our independent funding sources and further developing our social enterprise initiatives, in response to the growing awareness of the need to understand and respond to mental health differently across all sectors, communities and systems.

The Forum continues to manage its resources in an efficient manner and is therefore able to ensure that funding is targeted on developing and improving services. We recognise the necessity of raising funds and generating diverse income streams, in order to strengthen our service delivery and to fulfil our objectives and potential as an organisation moving forward. Achieving longer term financial sustainability is a priority for the years ahead, even more so as we anticipate financial pressures on public services in the years to come as a result of the COVID-19 pandemic.

The Forum has received a number of generous donations and support throughout the year from individuals, legacies, community groups and organisations. We want to specifically acknowledge the following:

Number of personal donors and supporters	Loyal Manor Lodge of Freemasons
Family donations in memory	Thorn Steering Group
A J Wakely & Sons Funeral Services	Fisher Associates
National Lottery Community Fund	Life Works, part of the Footprints Project
Lloyds Bank Foundation	Stone Design

The Trustees would like to thank everyone who has contributed to the Forum's activities during the year for their support, including the Charity's workforce, volunteers, beneficiaries, funders and donors.

Income during the year was £1,186,147 (2020: £1,186,252) of which £1,059,933 (2020: £1,054,591) related to restricted project activities. Total expenditure during the year was £941,466 (2020: £896,764), of which £864,379 (2020: £795,778) was from restricted funds and £77,087 (2020: £100,986) from unrestricted funds. Net income for the year totalled £244,681 (2020: £289,488) with net income of £49,127 (2020: £30,675) relating to unrestricted activities and net income of £195,554 (2020: £258,813) relating to restricted funds.

Income levels have been consistent during the year. Trustees are assured and satisfied that the organisation is a going concern for the next 12 months and has financial resilience for the foreseeable future.

Reserves at 31<sup>st</sup> March 2021 total £797,054 (2020: £552,373) and consist of restricted funds of £552,957 (2020: £369,710) and unrestricted funds of £244,097 (2020: £182,663), of which £65,000 (2020: £59,000) is determined by the Trustees as designated reserves for specific purposes.

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**Reserves Policy**

Trustees are aware of the need to retain funding for future endeavors and developments, in order to meet the needs of the Charity's beneficiaries. Trustees review the level of reserves required on a regular basis, to ensure that they are adequate to fulfil the Charity's continuing obligations and in line with the Charity's Reserves Policy and objectives.

The Charity regularly reviews its Reserves Policy to ensure that it is achieving the appropriate balance between the need to serve beneficiaries as quickly as possible and the need to manage risks appropriately. In doing so, the Charity considers sector guidance for charities to hold reserves for the purpose of protecting the continuity of the Charity's work, providing funds needed for the development of the Charity, or providing funds needed to replace assets. It is the policy of the Charity that reserves should provide adequate financial stability and means for the Charity to meet its charitable objectives for the foreseeable future.

The Reserves Policy and the designations made within the reserves are key tools in monitoring and maintaining sufficient cash flows. The Trustees deem it necessary to have the security of reserves to maintain and develop activities with confidence, particularly where there may be timing delays with funding streams and to build resilience in the event of unforeseen difficulties. The determination of an appropriate reserves level is a key part of the strategic planning process and is linked to risk assessment of key areas of income and expenditure, along with future strategic development.

Trustees review the allocation of the Charity's reserves and make specific designations where applicable. Restricted funds are funds required to be used for a specific purpose. Free reserves represent unrestricted funds of the Charity excluding restricted and designated funds. The Trustees aim to hold sufficient free reserves to ensure financial sustainability, operational continuity to meet the needs of beneficiaries in the event of unforeseen situations and future strategic development.

The Trustees have reviewed the Reserves Policy during the year. Trustees consider it prudent to set aside an amount equivalent to between three and twelve months of anticipated annual running costs. For the coming year, based on 2020/21 figures, this range would be between £82,023 and £328,092. As at 31 March 2021, unrestricted reserves stood at £244,097, less £3,765 held as fixed assets and £65,000 designated reserves leaving £175,332 (2020: £118,390) of free reserves which is within the range of this Reserves Policy.

These reserves would enable the Charity to continue to operate in the short term in the event of income shortfall and while action is being taken to replace funding or to implement required changes. Trustees are mindful of the long term impact of the pandemic and are taking active steps to increase the level of free reserves over the next two years to build resilience and the longer-term sustainability and stability of the Charity.

**PLANS FOR THE FUTURE**

2020/21 has been an extraordinary and unexpected year, which presented many challenges, as well as opportunities. The Charity has been able to maintain its financial position and increase impact, as well as undertaking consolidation, longer term strategic planning and transformation activities during the year. In 2021/22, we will continue to build on the success and achievements of the Charity to date. We believe that there is much work to be done for the public benefit, particularly in the wake of the COVID-19 pandemic.

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During 2020/21, we refreshed our Strategy, in preparation for 2021/22 and subsequent years. The Charity's Strategic Aims remain as follows:

- To increase understanding of mental health through Recovery Education and Coproduction.
- To support and enable people to live the lives they wish to live.
- To develop capacity and build connected communities across Dorset.
- To influence and transform local services with the collective voice of lived experience expertise.

The Forum's activities moving forward will be focused in the areas of Education, Agency, Activism, System, Parity, Connection, Collaboration and Employment, enabled by our three supporting strategies.

Our proposed future developments include:

- **Diversity:** Further developing our lived experience infrastructure and constituency networks to ensure that we are engaging and representative of communities in Dorset. Providing more opportunities for people with lived experience of mental health problems and Recovery to inform, influence and shape local services and communities, bringing about increased understanding and change in culture and outcomes for people experiencing mental health problems.
- **Partnerships:** Developing relationships across the Dorset System and local communities to add value, build capacity, grow connections and influence change, educating, enabling and evolving local communities and services around mental health and wellbeing through Recovery Education and Coproduction.
- **Dorset System change:** Continuing to support and engage with System change and integration across Dorset for public benefit, challenging health inequalities and embracing opportunities for new ways of working across statutory services, VCSE and local communities.
- **Demonstrating impact:** Continuing to develop the Forum's systems and processes to capture and communicate the impact and outcomes of our work for funders, staff, beneficiaries and the public.
- **Digital transformation:** Building on considerable progress made during 2020/21, further embracing new ways of working and exploring opportunities for developing innovation, efficiencies, quality assurance, governance, communication and engagement throughout all of the Charity's operations. This includes a commitment to supporting equality of opportunity, understanding different needs and continuous learning and development.
- **Income diversification:** Further developing income generation and fundraising activities to ensure longer term sustainability, independence and integrity to fulfil the Forum's charitable purpose.

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**TRUSTEES' RESPONSIBILITIES**

The Trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the income and expenditure of the Charity for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the constitution. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



.....  
**Ann Abraham**  
Chair

..... 27th July 2021

**Dorset Mental Health Forum**  
**Financial Statements**  
**For the year to 31 March 2021**  
**Independent Auditor's Report to the Trustees of Dorset Mental Health Forum**

**Opinion**

We have audited the financial statements of Dorset Mental Health Forum (the 'Charitable incorporated organisation') for the year ended 31 March 2021 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cashflows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the Charity's affairs as at 31 March 2021 and of its income and expenditure for the period then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- have been prepared in accordance with the requirements of the Charities Act 2011.

**Basis for opinion**

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

**Conclusions relating to going concern**

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the society's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

**Other information**

The Trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

## **Dorset Mental Health Forum**

### **Financial Statements**

**For the period 31 March 2021**

### **Independent Auditor's Report to the Trustees of Dorset Mental Health Forum (continued)**

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

### **Matters on which we are required to report by exception**

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- The information given in the report of the Trustees is inconsistent in any material respect with the financial statements;
- sufficient accounting records have not been kept;
- the financial statements are not in agreement with the accounting records and returns; or
- we have not obtained all the information and explanations necessary for the purposes of our audit.

### **Responsibilities of the Trustees**

As explained more fully in the Trustees' responsibilities statement, the Trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as they determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

### **Our responsibilities for the audit of the financial statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditor's report.

**Dorset Mental Health Forum**  
**Financial Statements**  
**For the period 31 March 2021**  
**Independent Auditor's Report to the Trustees of Dorset Mental Health Forum (continued)**

**Identifying and assessing potential risks of material misstatement due to irregularities**

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- the legal and regulatory framework in which the Charity operates
- the nature of the sector in which the Charity operates
- the control environment and controls established to mitigate such risks
- the results of our enquiries of management about their identification and assessment of risks of irregularities
- discussions with the audit engagement team about where fraud might occur
- the incentives for fraud.

Laws and regulations which are considered to be significant to the Charity include those relating to the requirements of financial reporting framework FRS102, the Charities Act 2011, UK tax legislation, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the Charity.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

**Audit responses to risks identified**

We undertook audit procedures to respond to the risks identified, and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- gaining an understanding of the Charity's procedures for ensuring compliance with laws and regulations
- testing the appropriateness of journal entries and other adjustments
- considering whether accounting estimates were indicative of potential bias
- considering whether any transactions arose outside the normal course of business
- making enquiries of management
- corroborating our enquiries through review of Board Minutes and correspondence.

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditor's report.

**Dorset Mental Health Forum**  
**Financial Statements**  
**For the period 31 March 2021**  
**Independent Auditor's Report to the Trustees of Dorset Mental Health Forum (continued)**

**Use of our report**

This report is made solely to the Charity's Trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

We have been appointed as auditor under section 144/145 of the Charities Act 2011 and report in accordance with the regulations made under section 145 of that Act.



A C Mole (Statutory Auditor)  
Chartered Accountants and Statutory Auditors  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset TA1 2PX

.....27th July... 2021

A C Mole is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006.

**Dorset Mental Health Forum**

**Statement of Financial Activities**  
**For the year ended 31 March 2021**

	Notes	Unrestricted Funds £	Restricted Funds £	Total Funds 2021 £	Unrestricted Funds £	Restricted Funds £	Total Funds 2020 £
<b>Income:</b>							
Donations and legacies	2	3,153	-	3,153	4,413	-	4,413
Charitable activities	3	122,183	1,059,933	1,182,116	126,101	1,054,591	1,180,692
Other		878	-	878	1,147	-	1,147
		_____	_____	_____	_____	_____	_____
<b>Total income</b>		126,214	1,059,933	1,186,147	131,661	1,054,591	1,186,252
		=====	=====	=====	=====	=====	=====
<b>Expenditure:</b>							
Charitable activities	4	77,087	864,379	941,466	100,986	795,778	896,764
		_____	_____	_____	_____	_____	_____
<b>Total expenditure</b>		77,087	864,379	941,466	100,986	795,778	896,764
		=====	=====	=====	=====	=====	=====
<b>Net income/(expenditure) before transfers</b>		49,127	195,554	244,681	30,675	258,813	289,488
<b>Transfers between funds</b>		12,307	(12,307)	-	-	-	-
		_____	_____	_____	_____	_____	_____
<b>Net movement in funds</b>		61,434	183,247	244,681	30,675	258,813	289,488
<b>Reconciliation of funds:</b>							
<b>Total funds brought forward</b>		182,663	369,710	552,373	151,988	110,897	262,885
		_____	_____	_____	_____	_____	_____
<b>Total funds carried forward</b>		244,097	552,957	797,054	182,663	369,710	552,373
		=====	=====	=====	=====	=====	=====

**Dorset Mental Health Forum**

**Balance Sheet**  
**As at 31 March 2021**

	Notes	2021		2020	
		£	£	£	£
<b>Fixed assets</b>					
Tangible assets	9		3,765		5,273
<b>Current assets</b>					
Debtors	10	172,719		320,853	
Cash at bank and in hand		1,135,228		622,587	
		<u>1,307,947</u>		<u>943,440</u>	
<b>Creditors:</b>					
Amounts falling due within one year	11	514,658		396,340	
		<u>514,658</u>		<u>396,340</u>	
<b>Net current assets</b>			793,289		547,100
			<u>793,289</u>		<u>547,100</u>
<b>Total assets less current liabilities</b>			797,054		552,373
			<u>797,054</u>		<u>552,373</u>
<b>Net assets</b>			797,054		552,373
			<u>797,054</u>		<u>552,373</u>
<b>The funds of the Charity</b>					
<b>Unrestricted funds:</b>					
General funds	14		179,097		123,663
Designated funds	14		65,000		59,000
			<u>244,097</u>		<u>182,663</u>
<b>Restricted funds</b>	14		552,957		369,710
			<u>552,957</u>		<u>369,710</u>
<b>Total Charity funds</b>			797,054		552,373
			<u>797,054</u>		<u>552,373</u>

Approved by the Board of Trustees for issue on 27th July 2021 and signed on their behalf by:



**Ann Abraham**  
**Chair**

**Dorset Mental Health Forum**

**Statement of Cashflows**  
**For the year ended 31 March 2021**

	Note	2021		2020	
		£	£	£	£
<b>Cashflows from operating activities</b>					
Net cash provided by operating activities	13		511,763		213,445
<b>Cashflows from investing activities</b>					
Purchases of property, plant and equipment		-		(4,896)	
Interest from investments		878		1,037	
Net cash provided by/(used in) investing activities			878		(3,859)
Change in cash and cash equivalents in the reporting period			512,641		209,586
Cash and cash equivalents at the beginning of the reporting period			622,587		413,001
Cash and cash equivalents at the end of the reporting period			1,135,228		622,587

## **Dorset Mental Health Forum**

### **Notes to the Financial Statements** **For the year ended 31 March 2021**

#### **1. Accounting Policies**

##### **1.1 General information**

Dorset Mental Health Forum is a Charitable Incorporated Organisation governed by its Constitution. The address of the principal office is given on page 2. The nature of the Charity's operations and its principal activities are set out in the Trustees' report on pages 3 – 25.

##### **Basis of accounting and assessment of going concern**

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (issued October 2019) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS102) and the Charities Act 2011.

The Charity meets the definition of a public benefit entity under FRS 102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

##### **1.2 Income recognition**

All income is included in the statement of financial activities when the Charity is entitled to the income, it is probable the income will be received and the amount can be measured reliably. The following specific policies are applied to particular categories of income.

Donations and gifts are recognised in the Statement of Financial Activities when receivable. Legacy income is recognised in the financial statements in the period that it has been received or where there is sufficient evidence that it is probable that the legacy will be received.

Income from grants and contracts, relating to charitable activities are recognised in the Statement of Financial Activities when receivable. If there is a Service Level Agreement or Contract in place income is taken into account in the period to which it relates. Where grants and contract income received have conditions or restrictions as to their use attached the income is recognised as restricted income funds. Where no such conditions or restrictions exist, grants and contract income received are recognised as unrestricted income.

Investment income in respect of funds held on deposit is included when receivable and the amount can be measured reliably. This is normally upon notification of the interest paid by the bank.

Other income is recognised in the Statement of Financial Activities when receivable this relates largely to the reimbursement of expenditure.

## **Dorset Mental Health Forum**

### **Notes to the Financial Statements** **For the year ended 31 March 2021**

#### **1.3 Donated services**

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

#### **1.4 Expenditure recognition**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably. All expenditure is accounted for on an accruals basis. All expenses, including support costs and governance costs, are allocated or apportioned to the applicable expenditure headings in the statement of financial activities.

Charitable expenditure comprises those costs incurred by the Charity in the delivery of its charitable activities and services. It includes both costs that can be allocated directly to such activities and costs of an indirect nature which are necessary to support them. Those support costs of an indirect nature include the resources of senior management, personnel, HR, IT, premises, finance and governance which are apportioned on a basis consistent with the use of resources largely by reference to time spent although alternative methods of apportionment may be used where they produce a more equitable result. Details of apportionment of support costs are shown in note 5.

#### **1.5 Pension costs**

The Charity operates workplace pension schemes for its qualifying employees. The schemes used are the government established National Employment Savings Trust (NEST) and Standard Life Stakeholder Scheme. Both schemes are defined contribution schemes and the amount included in the Statement of Financial Activities represents the contributions payable to the scheme in respect of the accounting period.

#### **1.6 Operating leases**

Leases in which substantially all the risks and rewards of ownership are retained by the lessor are classified as operating leases. Rentals payable under operating leases are charged to the Statement of Financial Activities over the term of the lease. The Charity has operating leases for the premises from which it operates. The title of the leased premises remains with the lessor.

#### **1.7 Fixed assets**

Where fixed assets are purchased they are stated at their purchase cost plus any incidental expenses of acquisition. Where fixed assets are donated, they are stated at their estimated market value on acquisition. Depreciation is charged in respect of fixed assets and is calculated so as to write off the cost of the assets, less any estimated residual value, over their expected useful economic useful lives as follows:-

Office equipment and furniture - 25% of written down value

## **Dorset Mental Health Forum**

### **Notes to the Financial Statements** **For the year ended 31 March 2021**

#### **1.8 Cash and cash equivalents**

Cash and cash equivalents includes cash in hand and other short term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

#### **1.9 Taxation**

Dorset Mental Health Forum is a registered charity and is therefore not liable to taxation to the extent that its income and gains are applicable to charitable purposes only. Value added tax is not recoverable and is therefore included in the relevant costs in the Statement of Financial Activities.

#### **1.10 Fund accounting**

General funds are unrestricted funds which are available for use at the discretion of the Board in furtherance of general objectives of the Charity, and which have not been designated for other purposes.

Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

Restricted funds are to be used for specific purposes as laid down by the donor. Expenditure which meets this criterion is charged to the fund, together with fair allocation of management and support costs as appropriate.

#### **1.11 Financial instruments**

The Charity only has financial assets and liabilities that qualify as basic financial instruments including trade and other debtors, cash and bank balances and trade and other payables. Basic financial instruments are initially recognised at transaction price and subsequently at amortised cost.

#### **1.12 Critical accounting estimates and judgements**

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

The Trustees are of the opinion that there are no estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

## Dorset Mental Health Forum

### Notes to the Financial Statements For the year ended 31 March 2021

#### 2. Income from donations and legacies

	Unrestricted Funds	Restricted Funds	Total Funds 2021	Unrestricted Funds	Restricted Funds	Total Funds 2020
	£	£	£	£	£	£
Donations and gifts	3,153	-	3,153	4,413	-	4,413
	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
	3,153	-	3,153	4,413	-	4,413
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

#### 3. Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds 2021	Unrestricted Funds	Restricted Funds	Total Funds 2020
	£	£	£	£	£	£
Advocacy Services						
Dorset Council	-	66,596	66,596	-	66,596	66,596
Dorset Healthcare	-	7,565	7,565	-	7,565	7,565
BCP Council	-	99,898	99,898	-	99,898	99,898
Lived Experience Infrastructure						
Dorset HealthCare	84,259	-	84,259	84,259	-	84,259
Dorset CCG	10,000	-	10,000	10,000	-	10,000
Borough of Poole/BCP Council	5,000	-	5,000	5,000	-	5,000
Lloyds Bank Foundation	-	-	-	-	14,500	14,500
National Lottery Community Fund	-	105,500	105,500	-	168,000	168,000
National Lottery	-	30,400	30,400	-	-	-
Recovery Education Centre (REC)						
NHS Foundation Trust	-	33,800	33,800	-	33,800	33,800
Dorset Wellbeing and Recovery Partnership						
Dorset HealthCare	-	538,004	538,004	9,404	534,752	544,156
DMH Carers Project Income	-	3,000	3,000	-	3,000	3,000
Employment Service						
Dorset CCG	-	125,000	125,000	-	125,000	125,000
Sports and Social Programme	-	5,980	5,980	4,141	1,480	5,621
Dorset CCG						
Business Think Tank	-	44,190	44,190	-	-	-
Social Enterprise	6,970	-	6,970	8,797	-	8,797
Open Door	15,600	-	15,600	-	-	-
School for Social Entrepreneurs	-	-	-	4,500	-	4,500
Other	354	-	354	-	-	-
	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
	122,183	1,059,933	1,182,116	126,101	1,054,591	1,180,692
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

## Dorset Mental Health Forum

### Notes to the Financial Statements For the year ended 31 March 2021

#### 4. Expenditure on charitable activities

	Activities undertaken directly £	Support Costs £	Total 2021 £	Activities undertaken directly £	Support Costs £	Total 2020 £
Advocacy	107,538	49,200	156,738	117,066	46,853	163,919
WaRP Projects	342,554	155,579	498,133	406,591	190,867	597,458
WaRP Core	77,087	-	77,087	71,368	-	71,368
Sports and Social	2,740	1,642	4,382	21,769	9,081	30,850
National Lottery Community Fund	114,686	44,580	159,266	25,169	3,000	28,169
DMH Carers Project	1,670	-	1,670	-	5,000	5,000
Dorset CCG	44,190	-	44,190	-	-	-
	690,465	251,001	941,466	641,963	254,801	896,764

#### 5. Analysis of support costs

	Advocacy £	National Lottery £	WaRP Projects £	Sports and Social £	Total £
Central Services					
- HR	5,320	4,933	16,575	249	27,077
- Finance	5,593	5,157	17,852	205	28,807
- IT	7,069	6,385	22,080	225	35,759
Senior Leadership Team	16,684	15,078	53,568	547	85,877
Premises & Office	7,416	6,652	23,593	233	37,894
Governance & Strategic Costs	5,653	5,026	16,823	145	27,647
PR & Marketing	1,465	1,349	5,088	38	7,940
	49,200	44,580	155,579	1,642	251,001

Support costs have been apportioned based on actual delivery hours.

## Dorset Mental Health Forum

### Notes to the Financial Statements For the year ended 31 March 2021

#### 6. Auditors' remuneration

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Audit fee	5,700	4,794
Accountancy fees	4,410	4,200
Payroll services	4,596	2,449
	<hr/>	<hr/>
	14,706	11,443
	<hr/>	<hr/>

#### 7. Trustees expenses and remuneration

No remuneration has been paid to or on behalf of the Trustees (2020: Nil).

Expenses totalling £Nil (2020: £432) were reimbursed to Nil (2020: two) Trustees for travel and subsistence during the year.

#### 8. Employees and employment costs

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Wages and salaries	682,005	634,484
Social security costs	47,199	42,798
Pension costs	20,662	11,497
	<hr/>	<hr/>
	749,866	688,779
	<hr/>	<hr/>

No individual employee was paid over £60,000 (2020: none).

The average monthly headcount (number of staff employed) during the year was:

	<b>2021</b>	<b>2020</b>
	<b>No</b>	<b>No</b>
All Staff	72	69
	<hr/>	<hr/>

The key management personnel of the Charity are considered to be the Chief Executive Officer, Director of Operations and Head of Impact and Quality. The total employee benefits for key management personnel were £120,871 (2020: £87,718).

The Charity operates defined contribution pension schemes. The pension cost charged to the Statement of Financial Activities for the period represents contributions payable by the Charity to the schemes and amounted to £20,662 (2020: £11,497).

Volunteers contribute unpaid time to the services provided by the Charity. The estimated volunteer time for the period amounted to approximately 3,200 hours (2020: 3,850 hours), totalling an estimated £51,200 (2020: £61,600), which has not been reflected in the Statement of Financial Activities in accordance with the Charities SORP (FRS 102).

**Dorset Mental Health Forum**

**Notes to the Financial Statements**  
**For the year ended 31 March 2021**

9. **Tangible fixed assets**

	<b>Office Equipment And Furniture £</b>	<b>Total £</b>
<b>Cost</b>		
As at 01.04.20	6,032	6,032
Additions	-	-
	<hr/>	<hr/>
As at 31.03.21	6,032	6,032
	<hr/>	<hr/>
<b>Depreciation</b>		
As at 01.04.20	759	759
Charge for year	1,508	1,508
	<hr/>	<hr/>
As at 31.03.21	2,267	2,267
	<hr/>	<hr/>
<b>Net book value</b>		
As at 31.03.21	3,765	3,765
	<hr/> <hr/>	<hr/> <hr/>
As at 31.03.20	5,273	5,273
	<hr/> <hr/>	<hr/> <hr/>
10. <b>Debtors</b>	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Debtors	172,719	317,595
Prepayments	-	3,258
	<hr/>	<hr/>
	172,719	320,853
	<hr/> <hr/>	<hr/> <hr/>

**Dorset Mental Health Forum**

**Notes to the Financial Statements**  
**For the year ended 31 March 2021**

11.	<b>Creditors: Amounts falling due within one year</b>	<b>2021</b>	<b>2020</b>
		<b>£</b>	<b>£</b>
	Creditors	402	239
	Accruals and deferred income	514,256	396,101
		—————	—————
		514,658	396,340
		=====	=====

12. **Related party transactions**

There were no related party transactions during the year. (2020: None.)

Remuneration paid to key management personnel is disclosed in note 8.

13. **Reconciliation of net income/(expenditure) to net cashflow from operating activities**

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
<b>Net income/(expenditure) for the period as per the Statement of Financial Activities</b>	244,681	289,488
Adjustments for:		
Depreciation charges	1,508	262
Decrease/(Increase) in debtors	148,134	(256,225)
Increase in creditors	118,318	180,957
Interest from investments	(878)	(1,037)
	—————	—————
<b>Net cash generated from operating activities</b>	511,763	213,445
	=====	=====

## Dorset Mental Health Forum

### Notes to the Financial Statements For the year ended 31 March 2021

#### 14. Statement of funds

	<b>Balance</b> <b>01.04.20</b> <b>£</b>	<b>Income</b> <b>£</b>	<b>Expenditure</b> <b>£</b>	<b>Transfer</b> <b>£</b>	<b>Balance</b> <b>31.03.21</b> <b>£</b>
<b>Unrestricted funds</b>					
General funds	123,663	126,214	(77,087)	6,307	179,097
<b>Designated funds</b>					
REC	12,000	-	-	(12,000)	-
Sports and Social	7,000	-	-	(7,000)	-
Charity development	20,000	-	-	5,000	25,000
Digital development	20,000	-	-	(5,000)	15,000
Evaluation activities	-	-	-	25,000	25,000
	-----	-----	-----	-----	-----
<b>Total unrestricted funds</b>	<b>182,663</b>	<b>126,214</b>	<b>(77,087)</b>	<b>12,307</b>	<b>244,097</b>
	=====	=====	=====	=====	=====
<b>Restricted funds</b>					
Advocacy	10,140	174,059	(156,738)	-	27,461
Employment	39,775	-	-	-	39,775
Community development	64,630	-	-	-	64,630
WaRP	98,628	696,804	(487,797)	-	307,635
Sports and Social	248	5,980	(4,382)	-	1,846
National Lottery 1	139,831	105,500	(128,866)	(12,307)	104,158
National Lottery 2	-	30,400	(30,400)	-	-
Lloyds Bank Foundation	14,500	-	(10,336)	-	4,164
DMH Carers Project income	1,958	3,000	(1,670)	-	3,288
Dorset CCG	-	44,190	(44,190)	-	-
	-----	-----	-----	-----	-----
<b>Total restricted funds</b>	<b>369,710</b>	<b>1,059,933</b>	<b>(864,379)</b>	<b>(12,307)</b>	<b>552,957</b>
	-----	-----	-----	-----	-----
<b>Total funds</b>	<b>552,373</b>	<b>1,186,147</b>	<b>(941,466)</b>	<b>-</b>	<b>797,054</b>
	=====	=====	=====	=====	=====

#### **Restricted Funds**

- Advocacy funding was provided by Dorset County Council, Bournemouth Borough Council, BCP Council and Dorset HealthCare University NHS Foundation Trust (DHC) for the provision of Advocacy services for people subject to the Mental Health Act 1983 and people experiencing mental health problems in Dorset.
- Employment funds are held to provide employment related activities to individuals and local employers in Dorset.
- Community development funds (previously named Social Inclusion) are held for projects to be started in the future.

## **Dorset Mental Health Forum**

### **Notes to the Financial Statements** **For the year ended 31 March 2021**

#### **14. Statement of funds (continued)**

- The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised partnership between Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust which puts lived experience expertise at the heart of service design and delivery, to transform services and affect culture change. Funding supported over 35 different partnership projects and work streams during the year. The Recovery Education Centre (REC), Dorset Work Matters, the Discovery Project and the Retreats were four of these projects.
- Active Dorset grant received for set up and delivery of DMHF Climbing Satellite Club as part of the Forum's Sports and Social Programme.
- Dorset Community Foundation grant received from the Dorset Coronavirus Community Fund to support delivery of the Sports and Social Programme during the pandemic period.
- National Lottery Community Fund (National Lottery 1) grant received to influence and facilitate culture change around mental health across the whole of Dorset, by building capacity within communities.
- National Lottery Community Fund (National Lottery 2) grant received to provide outreach support and digital engagement activities during the pandemic period.
- Lloyds Bank Foundation grant received towards salary costs for interim senior transformation post to develop capacity within the organisation.
- Funds received and administered for the independent Dorset Mental Health Carers Project, supported by the Dorset Mental Health Forum.
- Dorset CCG funds received for innovation activities around mental health and wellbeing. Funds were transferred to Bournemouth University during the year to fund activities there.

#### **Designated Funds**

- Designated REC funds held for the specific purpose of meeting Recovery Education Centre (REC) related expenditure were not required during 2020/21.
- Designated Sports and Social Programme funds are held for the specific purpose of meeting project related expenditure were not required during 2020/21.
- Designated Charity development funds are held for the specific purpose of meeting expenditure directly related to the development of the Charity.
- Designated Digital development funds are held for the specific purpose of meeting expenditure directly related to digital transformation work within the Charity.
- Designated Evaluation activities funds are held for the specific purpose of meeting expenditure directly related to evaluation activities within the Charity.

**Dorset Mental Health Forum**

**Notes to the Financial Statements**  
**For the year ended 31 March 2021**

15. **Analysis of net assets between funds**

	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>Total Funds 2021</b>	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>Total Funds 2020</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Tangible fixed assets	3,765	-	3,765	5,273	-	5,273
Current assets	255,061	1,052,886	1,307,947	190,793	752,647	943,440
Creditors due within one year	(14,729)	(499,929)	(514,658)	(13,403)	(382,937)	(396,340)
	<u>244,097</u>	<u>552,957</u>	<u>797,054</u>	<u>182,663</u>	<u>369,710</u>	<u>552,373</u>

16. **Statement of funds for the year ended 31 March 2020**

	<b>Balance 30.03.19</b>	<b>Income</b>	<b>Expenditure</b>	<b>Transfer</b>	<b>Balance 31.03.20</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Unrestricted funds</b>					
General funds	90,351	131,661	(100,986)	2,637	123,663
<b>Designated funds</b>					
REC	24,962	-	-	(12,962)	12,000
Sport and Social	15,625	-	-	(8,625)	7,000
Charity Development	16,050	-	-	3,950	20,000
Premises	5,000	-	-	(5,000)	-
Digital Development	-	-	-	20,000	20,000
	<u>151,988</u>	<u>131,661</u>	<u>(100,986)</u>	<u>-</u>	<u>182,663</u>
<b>Restricted funds</b>					
Advocacy	-	174,059	(163,919)	-	10,140
Employment	39,775	-	-	-	39,775
Community development	64,630	-	-	-	64,630
WaRP	-	693,552	(594,924)	-	98,628
Sports and Social	-	1,480	(1,232)	-	248
National Lottery Community Fund	-	168,000	(28,169)	-	139,831
Lloyds Bank Foundation	-	14,500	-	-	14,500
DMH Carers Project income	1,492	3,000	(2,534)	-	1,958
Screwfix donation	5,000	-	(5,000)	-	-
	<u>110,897</u>	<u>1,054,591</u>	<u>(795,778)</u>	<u>-</u>	<u>369,710</u>
<b>Total funds</b>	<u><b>262,885</b></u>	<u><b>1,186,252</b></u>	<u><b>(896,764)</b></u>	<u><b>-</b></u>	<u><b>552,373</b></u>