



Contents

P3

Welcome

Chair & Chief Executive's Introduction

P5

Our Impact

P6

Strategic Report

- About Us
- Activities and Objectives
- Achievements and Performance during 2022/23
- Future Plans
- Financial Review
- Financial and Management Policies

P36

Structure, Governance and Management

P39

Statement of Trustees' Responsibilities

P40

Independent Auditor's Report

P43

Financial Statements

P57

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

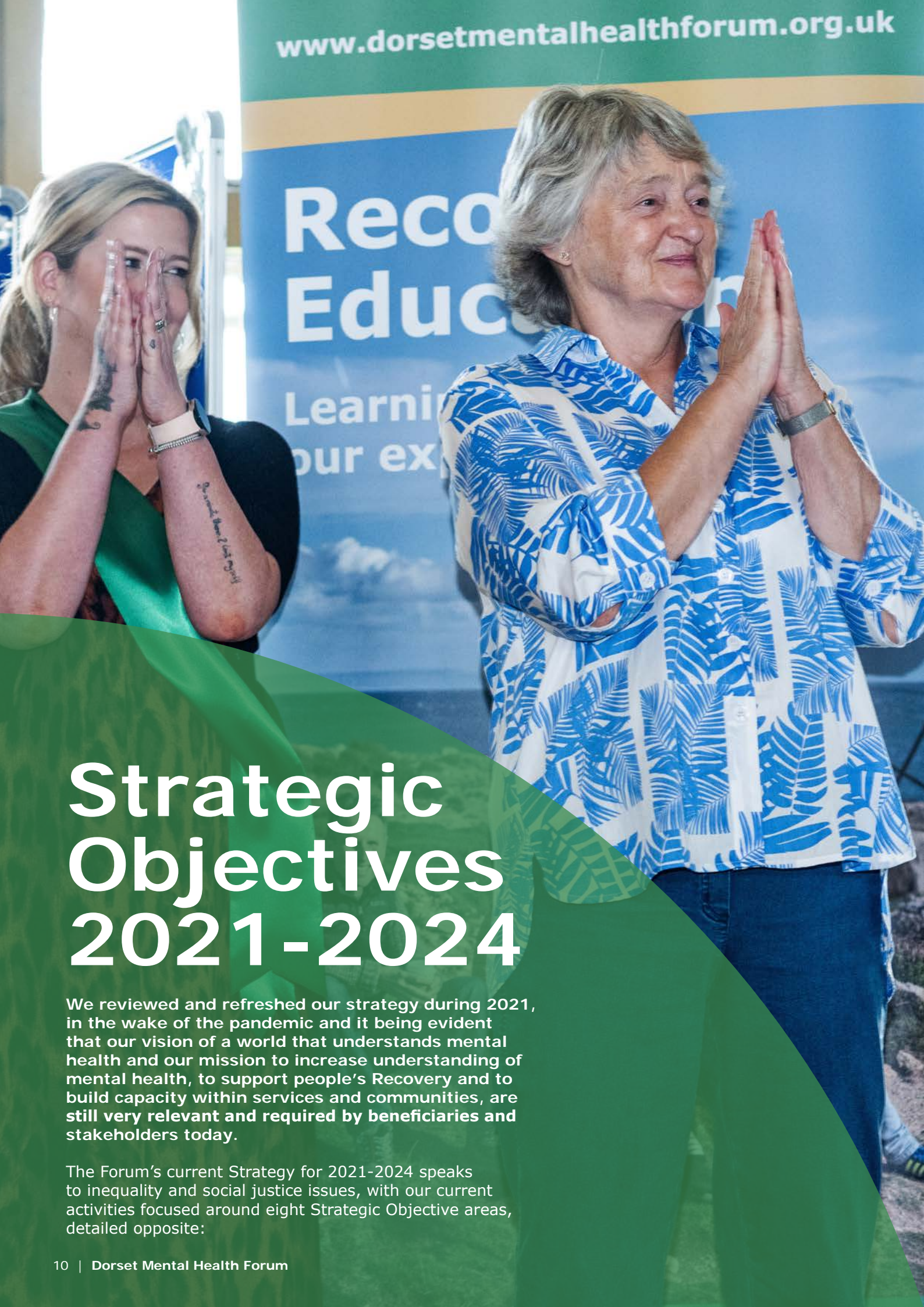
Peer Specialists within services are staff who intentionally utilise their lived experience of mental health issues, trauma, and emotional distress, to support Recovery oriented practices within local services and broader communities across Dorset.

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

Prevention & Recovery

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.

A man with short grey hair and glasses, wearing a dark blue turtleneck and a black Jack Wolfskin jacket, stands in front of a rustic stone wall. The wall is made of various sized stones and bricks, some with moss. The man is looking directly at the camera with a slight smile.

// 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
	£	£
Reserves at 31 March 2024:	1,332,837	1,253,538
Consisting of restricted funds of:	934,455	905,921
And unrestricted funds of:	398,382	347,617
Of which are determined by the Trustees as Designated funds for specific purposes*:	63,020	63,020
Less fixed assets:	Nil	749
Free reserves:	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. 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 £
Income:							
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
Total income		153,871	1,335,460	1,489,331	122,991	1,310,117	1,433,108
Expenditure							
Charitable activities	4	103,106	1,306,926	1,410,032	73,763	1,371,046	1,444,809
Total expenditure		103,106	1,306,926	1,410,032	73,763	1,371,046	1,444,809
Net (expenditure)/ income before transfers							
		50,765	28,534	79,299	49,228	(60,929)	(11,701)
Net movement in funds		50,765	28,534	79,299	49,228	(60,929)	(11,701)
Reconciliation of funds							
Total funds brought forward		347,617	905,921	1,253,538	298,389	966,850	1,265,239
Total funds carried forward		398,382	934,455	1,332,837	347,617	905,921	1,253,538

Balance Sheet

As at 31 March 2024

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

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

		2024		2023	
	Notes	£	£	£	£
Cashflows from operating activities					
Net cash (used in)/provided by operating activities	13	(308,401)			288,831
Cashflows from investing activities					
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
Cash and cash equivalents at the end of the reporting period		1,332,451			1,606,611

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
	1,930	-	1,930	8,087	-	8,087

3. Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds 2024	Unrestricted Funds	Restricted Funds	Total Funds 2023
	£	£	£	£	£	£
Advocacy Services						
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
Lived Experience Infrastructure						
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
Recovery Education Centre (REC)	-	75,235	75,235	-	33,800	33,800
Dorset Wellbeing and Recovery Partnership						
Dorset HealthCare	-	907,237	907,237	-	755,995	755,995
DMH Carers Project Income	-	3,000	3,000	-	3,000	3,000
Employment Service	-	125,000	125,000	-	125,000	125,000
Sports and Social Programme	-	3,995	3,995	-	4,013	4,013
SMI Physical Health	-	47,800	47,800	-	20,328	20,328
Dorset Open Door	-	71,878	71,878	-	69,718	69,718
Suicide Prevention	-	27,000	27,000	-	22,244	22,244
Health Education England	-	45,305	45,305	-	101,960	101,960
Social Enterprise	17,036	-	17,036	1,875	-	1,875
	116,295	1,335,460	1,451,755	101,134	1,310,117	1,411,251

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
	1,096,724	313,308	1,410,032	1,152,491	292,318	1,444,809

5. Analysis of support costs

	Advocacy £	WaRP Projects £	Talbot Village Trust £	NHS Dorset ICB £	Total £
Central Services					
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
Premises & Office	586	8,936	251	2,922	12,695
Governance & Strategic Costs	443	18,826	250	6,267	25,786
PR & Marketing	1,139	13,763	486	4,378	19,766
Business Manager	782	-	359	4,997	6,138
	14,284	216,573	5,996	76,455	313,308

Support costs have been apportioned based on actual delivery hours.

6. Auditor's remuneration

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

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
	1,118,418	1,046,456

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

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

	2024	2023
	People	People
Number of Staff	72	76

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).

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

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

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
	£	£
Cost		
As at 01.04.23 and 31.03.24	6,032	6,032
Depreciation		
As at 01.04.23	5,283	5,283
Charge for year	749	749
As at 31.03.24	6,032	6,032
Net book value		
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
	203,084	22,881

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
	202,698	376,703

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
	£	£
Net income/(expenditure) for the period as per the Statement of Financial Activities	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)
Net cash (used in)/generated by from operating activities	(308,401)	288,831

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
	£	£
Payments		
Within one year	1,181	1,181
Due in two to five years	1,475	2,656
	2,656	3,837

15. Statement of funds

	Balance 01.04.23 £	Income £	Expenditure £	Transfer £	Balance 31.03.24 £
Unrestricted funds					
General funds	284,597	153,871	(103,106)	-	335,362
Designated funds					
Charity development	25,000	-	-	-	25,000
Digital development	15,000	-	-	-	15,000
Evaluation activities	23,020	-	-	-	23,020
Total Unrestricted funds	347,617	153,871	(103,106)	-	398,382
Restricted funds					
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)	-
Total Restricted funds	905,921	1,335,460	(1,306,926)	-	934,455
Total funds	1,253,538	1,489,331	(1,410,032)	-	1,332,837

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)
	398,382	934,455	1,332,837	347,617	905,921	1,253,538

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

	01.04.22 £	Income £	Expenditure £	Transfer £	31.03.23 £
Unrestricted funds					
General funds	241,639	122,991	(52,184)	(27,849)	284,597
Designated funds					
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
Total unrestricted funds	298,389	122,991	(73,763)	-	347,617
Restricted funds					
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)	-
Total restricted funds	966,850	1,310,117	(1,371,046)	-	905,921
Total funds	1,265,239	1,433,108	(1,444,809)	-	1,253,538

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