

SAMEE - Annual Report 2024



Annual Report and Independently Examined Financial Statements

For the Period Ending 30th November 2024

SAMEE

Charity Registration Number 1170328

SAMEE - Charity Registration Number 1170328
Report of the Trustees for the Year Ending 30th November 2024

The Board of Trustees have pleasure in presenting their Annual Report for the year ending 30th November 2024.

1. Chair of Trustees Report

Welcome to the SAMEE 2023/24 Annual Report reflecting on the year, highlighting significant achievements, challenges, and our vision moving forward.

SAMEE has enjoyed a year of innovation and growth which has seen a new Chair of Trustees and Vice Chair of Trustees appointed as the terms of office for both previous post holders came to a natural conclusion. I would like to take this opportunity to thank them for their dedicated years of service to the charity. SAMEE has also started to scale operational delivery which has resulted in significant team growth to support programme delivery.

Over the last 12 months, SAMEE has continued its commitment to empower and support disabled people to explore self-employment by evolving our services, expanding our reach, and creating new meaningful stakeholder partnerships. The charity has developed a new 12-month Supported Self-Employment Internship, supporting neurodiverse young people achieve our accredited Steps Into Self-Employment qualification and gain the skills needed to fully explore self-employment career pathways that meet their unique additional needs. Across all of our programmes the SAMEE team has delivered significant social impact results in a challenging socio-economic environment, making a profound difference to the lives of disabled people across the South West region and beyond through successful self-employment start up.

The SAMEE team and Trustees have collaborated over the last 12 months to develop an exciting 3-year strategy with the following aims:

- Continue to promote self-employment as a viable alternative to traditional employment for disabled people
- Create geographical pockets of excellence for our bespoke Self-Employment programmes and Supported Self-Employment Internships
- Explore a regional volunteering programme to enhance the opportunities available to disabled people
- Develop a peer-mentoring programme for beneficiaries, their families and wider circles of support

Our new 3-year strategy details our objectives in the following areas:

- **Awareness and Education** – focusing on raising awareness of the daily challenges disabled people face and how self-employment is an achievable option to help support independent living
- **Reach and Support** – focusing on meeting the bespoke needs of our beneficiaries through our delivery model, provision and increasing geographical reach
- **Advocacy and Enablement** – focusing on the daily delivery of high-quality services and our ability to influence, mentor and share best practice with others

All of the Trustees are proud of the new award-winning SAMEE Supported Self-Employment Internship programme. The first cohort of interns are making excellent progress exploring their business ideas and further developing holistic independent living skills. The Trustees are looking forward to seeing their businesses launch and thrive.

2. Our Vision, Mission and Ethos

As part of our new 3-year strategy and through collaboration with the full SAMEE team we revisited and updated our vision, mission and ethos.

Our Vision – Every disabled person can access the self-employment and holistic support they require to meet their individual needs through the co-creation of activities and bespoke resources.

Our Mission – To influence societal change through mentoring, advocacy and best practice, alongside innovative programme co-creation, development and delivery, enabling disabled people to access self-employment support to positively impact the reduction of the disability employment gap.

Our Ethos – The SAMEE team believe that every disabled person accessing our services deserves to lead a fulfilling life and achieve success on a journey that is as unique as they are.

3. Our Values

We also revised our SAMEE values:

We are Daring – When a disabled person wants to explore self-employment, our mentors have the confidence to encourage our participants to pursue their aspirations and dreams.

We are Honest – When exploring self-employment with our participants, we have the courage to discuss potential challenges openly with them to ensure that they are able to make independent and informed decisions.

We are Always Listening – We follow best practise and always actively listen to our beneficiaries and ensure that we deliver a bespoke package of co-created support and resources which fully meets the individual and holistic needs of each participant.

3. Key Achievements in 2024

There have been many notable milestones achieved throughout the year that the Trustees and SAMEE team are proud of such as: -

The development and launch of a new 12-month Supported Self-Employment Internship, supporting neurodiverse young people alongside the accredited Steps Into Self-Employment qualification. This innovative programme is currently supporting a first cohort of 8 young people to explore self-employment as their chosen career pathway.

Our CEO successfully featured on the 2024 Disability Power 100 as one of the most influential people within the disability community, which recognizes her significant advocacy work and the impactful skills-development work of our teams with their customers.

Awards

The 2024 Zero Project Awards – The whole SAMEE team are incredibly proud that our innovative practice has been recognised through being shortlisted for a Zero project 2025 award. The awards focus this year is in Innovative Solutions in Inclusive Employment and Information and Communication Technology. Our Supported Self-Employment Internship supports people with disabilities to develop the skills needed to run their own self-employed ventures, combining training in all aspects of self-employment alongside rotating work placements, mentoring support and gaining our accredited Steps Into Self-Employment level one qualification. From 90 countries across the world, our programme has been shortlisted from a total of 522

nominations. The Zero Project Awards stated “By addressing the needs and rights of persons with disabilities, you are contributing to the global effort to create a more just, equitable, and inclusive society – a world with zero barriers.” We will know if we are an awardee on the 3rd December 2024.

British Association of Supported Employment (BASE) UK Award – our Supported Self-Employment Internship was nominated for a BASE UK award, and we were shortlisted and runners up for the Innovations Award category.

Both of these award nominations and short-listing outcomes have helped SAMEE to gain recognition for our groundbreaking, innovative and impactful work supporting disabled people in a truly inclusive and accessible way.

Strategic Partnerships: SAMEE expanded its reach through newly formed partnerships with local authorities, government bodies, educational establishments and specialist providers, taking SAMEE delivery into new geographical areas, across the UK.

4. Advocacy and Policy Influence:

Our CEO continues to actively engage with policy-making bodies, contributing to legislation discussions on employment and disability rights. She continues in her voluntary role as Chair of the South West Regional Stakeholder Network within Disability Unit in the Cabinet office. Our CEO also continues to sit on the Department for Work and Pensions Autism Review Board, and has been invited to input into policy conversations with the new Government on the changes planned to the Universal Support programme, now to be called Connect to Work. This work has enabled SAMEE to raise its profile and as such we have been invited to deliver more workshops and take part in various discussion panels at a number of high-profile disability sector events:

SAMEE delivered a workshop at the 2024 BASE UK conference, with our CEO also being a panel member. The workshop focussed on how to co-develop and deliver truly bespoke support which fully meets the individual needs of disabled learners. The workshop was well received with positive feedback, and resulted in a significant number of new SEND-related organisations making contact to explore SAMEE support for their customers.

The Employment Related Services Association (ERSA) invited SAMEE to deliver a virtual workshop to their Youth Services Network. The session was well received and provided SAMEE with an opportunity to advocate for the unique needs of disabled young people within a self-employed context, providing advice on how organisations can better engage and support young disabled people whilst raising the profile of the charity and its work.

SAMEE has been invited to deliver an interactive workshop at the 2024 ERSA Conference taking place in December. This is a key event with the majority of the sector organisations attending as well as government policy decision makers. This is a significant opportunity for SAMEE to advocate for disabled people, while raising the charity's profile.

SAMEE also delivered workshops for The Royal Foundation – Homewards and at the 2024 Talentino conference.

Our CEO was invited to be a panel member at the SEND Summit for Policy Reform and Practice Impact debating the topic of re-imagining assessment in education. The lively discussion also explored alternative approaches to assessment, how these could work in practice and the difference this would make to young people with SEND.

SAMEE also delivered a workshop with our CEO also being a panel member at the 2024 Career Development Institute conference.

5. Our Programmes and Impact

We are proud of the holistic impact our programmes are having on the lives of the disabled people we are supporting:

Disabled Entrepreneurs Business Start-Up Service (DEBSS) – Our core adult support programme has supported 372 new customers this year with 93 starting new self-employment. We have successfully received grant funding to deliver DEBSS beyond Dorset, enabling us to scale our adult support and impact higher numbers of disabled people across a wider geographical area.

Steps Into Self-Employment (SISE) – Our award-winning level one programme that supports young disabled people to gain an accredited self-employment skills qualification continues to scale, and has become an integral part of our new Internship programme.

Supported Self-Employment Internship – Our groundbreaking programme, supporting neurodiverse young people to explore self-employment through business mentoring, relevant and relatable work-placements, education and holistic support; plus, work towards the accredited Steps Into Self-Employment level one qualification currently impacts a first cohort of 8 learners.

Since the charity started in 2016, we have had 1929 disabled adults referred to us for support with 26% working in sustainable self-employment. In addition, a further 10% of our disabled adults are now working in traditional employment roles. This demonstrates the lasting impact that support from SAMEE has on the lives of the disabled people that access our services.

We thank our dedicated staff, volunteers, funders, and partners who have been integral to our success.

5. Reference and Administrative Information

SAMEE was registered as a charity on the 23rd of November 2016, with the charity number 1170328. The registered office is 36 Heather Road, Bournemouth, BH10 5EE. The charity trades from 881 Christchurch Road, Bournemouth, BH7 6AU.

6. Trustees, SLT and Principal Adviser

Trustees:

Mr Sak Awan – Chair

Mr Mike Lammas – Vice Chair

Mrs Debbie Porter – Vice Chair

Mr Mark Everard

Ms Jacqueline Shave

Ms Elaine Collinson

Mr Christopher Martin

Ms Sara Brown – Treasurer and Charity Accountant

SLT:

The Chief Executive of the Charity is Mrs Samantha Everard

The Chief Operating Officer of the Charity is Mrs Tara Fisher

The Chief Impact Officer of the Charity is Mr Wayne Ingram

The Executive Officer of the Charity is Ms Sianell White

Principal Adviser:

Accountants – Clear Vision Accountancy Group, Mr Matthew Rogers

7. Governing Document

SAMEE is a registered charity and operates under a signed and agreed Constitution.

8. Trustee Recruitment, Induction and Training

Trustees are sought to bring in a variety of skills, specialisms and knowledge to support the management and governance of the charity. The Trustee board has the authority to co-opt members to its numbers at any time. Members of the board will be elected/re-elected at the AGM.

All new Trustees will be given a pack containing the constitution and policies/procedures of the charity along with the strategic plan, the Charity Commission guide “The Essential Trustee” and the latest statements pertaining to the charity.

9. Trustee Organisational Structure

SAMEE Board of Trustees must have a minimum of 3 members. Currently there are 8 Trustees. The Trustee board delegate the day to day running of the charity to the Chief Executive Officer and through her to the staff and volunteers. Budgetary control sits with the Chief Executive Officer and Accountant.

The Board of Trustees meets quarterly, or as often as is needed. Meetings take place on a hybrid basis with a mix of in-person and virtual.

10. Risk Management

The Chair of Trustees has supported the charity in a comprehensive review of the risk register which is regularly reviewed by the Senior Leadership Team to ensure risk is being mitigated and potential/actual emerging risks identified.

The charity has in place quality management systems that support timely policy review and updates. The charity has in place appropriate policies and procedures that safeguard our beneficiaries, staff, volunteers and Trustees.

11. Objectives

The Purpose and Objects of the CIO are:

The prevention or relief of poverty, or financial hardship, in Dorset and surrounding counties for the public benefit, by providing and assisting with the provision of education, training and all the necessary support designed to enable individuals to generate a sustainable income and be self-sufficient by:

- Providing an employment centre in Boscombe to supply unemployed and disadvantaged people with mentoring support, interview techniques, office facilities, free internet and subsistence
- providing information and guidance about the different entry routes to the labour market
- providing opportunities for work experience, shadowing and volunteering opportunities through working with local employers, charities and educational establishments
- providing interview skills and practice, cv guidance and other guidance support local people back into employment
- providing support to the educational establishments within their career’s guidance programmes
- to provide life skill training to support the public with transferable skills

12. Financial Review

The Statement of Financial Activities (SOFA) for SAMEE and the Balance sheet at 30th November 2024, together with the associated explanatory notes are given separate to this report.

13. Strategic Priorities for the Coming Year

Over the next 12 months the Charity plans to develop a new innovative programme for disabled adults aged over 25 based on our Supported Self-Employment Internship model. The charity recognises that when EHCP support ceases when a young person reaches 25 the support for them falls off of a cliff. We believe there is a need for the type of structured support our internship offers for those aged over 25. We will seek funding over the next 12 months to support the research, development, roll-out and ongoing delivery of this programme.

As per our strategic plan the Charity intends over the next 12 months to:

- Continue to promote self-employment as a viable alternative to traditional employment for disabled people
- Create geographical pockets of excellence for our bespoke Self-Employment programmes and Supported Self-Employment Internships
- Explore and secure corporate sponsorship, alongside a regional volunteer mentor programme, to enhance the opportunities available to disabled people
- Develop a peer-mentoring programme for beneficiaries, their families and wider circles of support

The overall vision for the SAMEE Charity is to continue to expand the delivery of our bespoke programmes on a national level, reaching higher numbers of disabled people, while using our leverage to influence and advocate on their behalf.

14. Stories of Impact

The Trustees and teams are incredibly proud of the thousands of customers that have been supported by the charity to explore and start self-employment. The impact for them and their customers is immeasurable.

Here is a focus on just a few:

Lavish 4 Me by Clair Lawrence

A Dorset based business run by SAMEE beneficiary Clair Lawrence. The business began from Clair being diagnosed with Trigeminal Neuralgia and Fibromyalgia. Clair wanted to find a more natural solution to hers and many other conditions. Clair found that using the powerful properties of essential oils was a great way to help. Claire wanted to make these benefits more accessible to others by making them useable outside of the home. Clair developed Lavish4me Nasal wands, which are an effective way of having the essential oils available to use anytime anywhere.

Those Thoughts by Amy Ellen

Dream big, achieve bigger. Those Thoughts. Cheerleading neurodivergent entrepreneurs who want to level up their business. Amy is a freelance designer based in Bournemouth who through SAMEE support has built a business that supports neurodivergent self-employed people to level up their business. Supporting with marketing and branding from logo to website design, social media graphics to print design. Amy says that as a neurodivergent entrepreneur she understands the struggles that come with trying to set up your own visual identity that truly reflects you and your business's values when you are neurodivergent.

Tornados and Trinkets by Emily Braz

Emily has ADHD and finds having a less traditional styled fidget spinner in the form of a ring was more discreet and really helped her concentration. Emily's goal is to help those who are struggling internally to

have a point of reference externally that is personal and beautiful. Her business Tornados and Trinkets sells fidget ring style jewellery, hand crafted, bespoke designed to each customer to help those struggling with the same problems she did. Her designs help with ADHD, Anxiety, calming the mind and more.

15. Public Benefit

The Charity acknowledges its requirement to demonstrate clearly that it must have charitable purposes or that are for the public benefit. The Trustees confirm that they have paid due regard to the Charity Commission guidance on public benefit before deciding what activities the Charity should undertake. They do not consider that any of the charity's activities cause any significant detriment or harm and believe that any private benefit arising from the activities is incidental.

This report was approved by the Board on 1st December 2024.

Financial Statement

	Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds	Prior Year Funds
Incoming Resources					
Income and endowments from:					
Donations & Legacies	£26,271.96	£271,967.00	£0.00	£298,238.96	£234,173.82
Charitable Activities	£0.00	£286,084.95	£0.00	£286,084.95	£119,624.29
Other Trading Activities	£0.00	£0.00	£0.00	£0.00	£0.00
Investments	£0.00	£0.00	£0.00	£0.00	£0.00
Separate Material Item of Income	£0.00	£0.00	£0.00	£0.00	£0.00
Other	£3,885.38	£0.00	£0.00	£3,885.38	£2,196.23
Total	£30,157.34	£558,051.95	£0.00	£588,209.29	£355,994.34
Resources Expended					
Expenditure on:					
Raising Funds	£0.00	£0.00	£0.00	£0.00	£3.49
Charitable Activities	£0.00	£548,789.96	£0.00	£548,789.96	£335,078.07
Separate Material Item of Expense	£451.09	£1,473.60	£0.00	£1,924.69	£3,112.49
Other	£0.00	£0.00	£0.00	£0.00	£0.00
Total	£451.09	£550,263.56	£0.00	£550,714.65	£338,194.05
Net income (expenditure)	£29,706.25	£7,788.39	£0.00	£37,494.64	£17,800.29
Net gain (losses)	£0.00	£0.00	£0.00	£0.00	£0.00
Net income (expenditure)	£29,706.25	£7,788.39	£0.00	£37,494.64	£17,800.29
Extraordinary Items	£0.00	£0.00	£0.00	£0.00	£0.00
Transfers between funds	£0.00	£0.00	£0.00	£0.00	£0.00
Other recognised gains (losses)	£0.00	£0.00	£0.00	£0.00	£0.00
Gains and losses on revaluation of fixed assets for the charity's own use	£0.00	£0.00	£0.00	£0.00	£0.00
Other gains (losses)	£0.00	£0.00	£0.00	£0.00	£0.00
Net movement in funds	£29,706.25	£7,788.39	£0.00	£37,494.64	£17,800.29
Reconcilliation of funds					
Total funds brought forward	£14,393.58	£167,306.53	£0.00	£181,700.11	£0.00
Total funds carried forward	£44,099.83	£175,094.92	£0.00	£219,194.75	£181,700.11

Balance Sheet

30th November 2024

ASSETS

Fixed Assets	Total Fixed Assets	£0.00
Current Assets	Bank Account	£206,024.09
	Paypal	£7.57
	Total Assets	£206,031.66

LIABILITIES

Smallwood Grant Trust Fund	£1,615.85
PAYE Payable	£459.16
Pension Payable	£89.90
Total Liabilities	£2,164.91

DEBTORS

Account Receivable	£15,328.00
Total Due	£15,328.00
Total Net Assets	£219,194.75

EQUITY

Net Profit / Loss (prior year(s))	£17,800.29
Net Profit / Loss (current year)	£37,494.64

Accounting Policies

Charity Information

SAMEE is a Charitable Incorporated Organisation (CIO), registered with the Charities Commission under number 1170328. The registered office is 36 Heather Road, Bournemouth, Dorset, BH10 5EE.

Accounting Convention

The financial statements have been prepared in accordance with the Charity's constitution and *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) * (as amended for accounting periods commencing from 1 January 2016). SAMEE is a Public Benefit Entity as defined by FRS 102.

SAMEE has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of SAMEE.

The financial statements have been prepared under the historical cost convention, modified to include the revaluation of freehold properties and to include investment properties and certain financial instruments at fair value. The principal accounting policies adopted are set out below.

Going Concern

At the time of approving the financial statements, the Trustees have a reasonable expectation that SAMEE has adequate resources to continue in operational existence for the foreseeable future. The Trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

Charitable Funds

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of their charitable objectives unless the funds have been designated for other purposes.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements where necessary.

Incoming Resources

Income is recognised when SAMEE is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Donations are recognised on receipt. Other donations are recognised once SAMEE has been notified of the donation unless performance conditions require deferral of the amount.

Resources Expended

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing SAMEE to that expenditure, it is probable that a transfer of economic benefits will be required in settlement, and the amount of the obligation can be measured reliably.

Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Where costs cannot be directly attributed to particular headings, they have been allocated to activities on a basis consistent with the use of resources.

Costs of charitable activities comprise the costs of providing facilities for self-employment support, employment support, workshops, and education, together with its associated support costs.

Other costs, noted as "Separate Material Item of Expense," are those functions that assist the work of SAMEE but do not directly undertake charitable activities. These include back-office costs, repairs and maintenance costs, finance, etc., which support the charity's activities.

Trustees

None of the Trustees personally received any remuneration or benefits from SAMEE during the year.

Reserves Policy

The reserves of the SAMEE charity fall into two different categories: Unrestricted Funds; Restricted Funds.

Unrestricted Funds represent those balances that can be used for any purpose that allows the SAMEE charity to achieve its stated objectives. The income is received with no restrictions placed by the giver as to how it may be used.

Restricted Funds show income awarded to the SAMEE charity for specific projects and purposes, as stated by the funder.

The SAMEE charity Trustees believe the reserves are more than adequate to maintain the charity through a month period. There are enough reserves to support the ongoing costs of the two admin employees and head office, should all projects cease and no further income be received. The Trustees are aware that the charity currently runs on a project-by-project basis and the costs associated with those are covered by the restricted grants coming in.

The Trustees keep the situation under review and will act to implement any changes that become necessary to ensure the continuation of the Charity.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the
trustees/directors/
members of

Charity Name

THE SAMEE CHARITY

On accounts for the year
ended

30 November 2024

Charity no.:

1170328

Company no.:

Set out on pages

9 to 12

(remember to include the page numbers of additional sheets)

I report to the charity trustees on my examination of the accounts of the Company for the year ended 30/11/2024

Responsibilities and
basis of report

As the charity's trustees of the Company (who are also the directors of the company for the purposes of company law), you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ("the 2006 Act").

Having satisfied myself that the accounts of the Company are not required to be audited for this year under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ("the 2011 Act"). In carrying out my examination, I have followed the Directions given by the Charity Commission (under section 145(5)(b) of the 2011 Act).

Independent
examiner's statement

[The company's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [~~Association of~~ ^{Chartered Certified Accountants} body]]. I

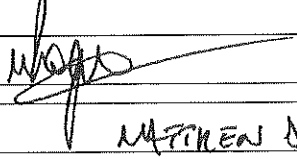
I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) which gives me cause to believe that:

- accounting records were not kept in accordance with section 386 of the Companies Act 2006; or
- the accounts do not accord with such records; or
- the accounts do not comply with relevant accounting requirements under section 396 of the Companies Act 2006 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination; or
- the accounts have not been prepared in accordance with the Charities SORP (FRS102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

* Please delete the words in the brackets if they do not apply.

Signed:



Date:

11.3.25

Name:

MATTHEW DAVIS ROGERS

Relevant professional qualification(s) or body (if any):

FCCA

Address:

1 ABRAHAM THORPE
NEWLANDS ROAD
CONSUMM, VIGORUE, SN13 0RN.

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.