



SAMEE - Annual Report 2025



Annual Report and Independently Examined Financial Statements

For the Period Ending 30th November 2025

SAMEE

Charity Registration Number 1170328

SAMEE - Charity Registration Number 1170328
Report of the Trustees for the Year Ending 30th November 2025

The Board of Trustees have pleasure in presenting their Annual Report for the year ending 30th November 2025.

1. Chair of Trustees Report

Welcome to the SAMEE 2024/25 Annual Report reflecting on the year, highlighting significant achievements, challenges, and our vision moving forward.

SAMEE has enjoyed an extended period of increasing growth under the guidance of our new Chair and two Vice Chairs of Trustees. In September we welcomed a new member to the SAMEE Trustee Board with an extensive background and active expertise in training which will play a significant part in enhancing the training needs of the entire SAMEE team. The Board has continued to provide sage guidance to the Senior Leadership Team (SLT) as SAMEE charity has continued to scale operational delivery particularly in the area of youth provision which has resulted in significant team growth to support programme delivery.

Over the last year, SAMEE has continued its commitment to enable and support disabled people to explore self-employment by evolving our services, expanding our reach, and creating new meaningful stakeholder partnerships.

All of the Trustees are proud of the progress being made with our award-winning SAMEE Supported Self-Employment Internship programme. There is now a Year 1 and Year 2 cohort with both intern groups making excellent progress exploring their business ideas and further developing independent living skills. The Trustees are looking forward to seeing the Year 2 cohort businesses launch and thrive.

Over the last 12 months, the charity has started to co-create a new Level 2 qualification for its award-winning Steps Into Self-Employment qualification with the future ambition of progressing the Supported Self-Employment Internship programme to an additional two years of provision. This would mean that disabled young adults will be able to explore their self-employment ideas and receive quality careers guidance for an initial 12 months via our Getting Ready for Tomorrow programme; before progressing onto the 24-month Supported Self-Employment Internship programme.

In July 2025, SAMEE moved to a brand-new premises with two levels to accommodate the growing staff team plus classroom for the Year 2 interns. The Getting Ready for Tomorrow cohort and Year 1 learners of the Supported Self-Employment Internship programme start their journey with SAMEE based at the Marsham Court hotel, and then the Year 1 cohort progress to our new Richmond Gardens site to continue their learning as Year 2 interns.

Across all of our programmes the SAMEE team has delivered significant social impact results in ongoing challenging socio-economic times, making a transformational difference to the lives of disabled people throughout the South West region and beyond via successful self-employment start up support.

The SAMEE team and Trustees have started over the last 12 months to work in accordance to the new 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

The new 3-year strategy objectives are currently being worked towards 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

2. Key Achievements in 2025

SAMEE team growth – operational delivery has expanded over the last 12 months particularly in the area of our Supported Self-Employment Internship, so the SAMEE team has grown accordingly. We have welcomed a new Wellbeing and Careers team to SAMEE, as well as a dedicated SENCO. Adult provision has also grown with two new mentors joining SAMEE which has grown the entire team to 43 staff members.

The 2025 Zero Project Award – The whole team are incredibly proud that our innovative practice was formally recognised as SAMEE won a Zero project 2025 award in the category of Innovative Solutions in Inclusive Employment and Information and Communication Technology. Our Supported Self-Employment Internship supports young 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 1 (and soon to be level 2) qualification. From 90 countries across the world, our programme was chosen from a total of 522 nominations. Our CEO was invited to Vienna and was presented the award at the United Nations building, met two British Ambassadors and also delivered a speech at the Austrian parliament in front of a packed house of Austrian M.P.s.

Lighthouse exhibition – for two weeks in October, the Year 1 and Year 2 interns of our Supported Self-Employment organised, set-up and exhibited their self-employed product/service ideas at the Lighthouse theatre in Poole, Dorset. The exhibition took up an entire floor of the theatre with all the interns attending the launch day event which was attended by the public and local M.P.

British Association of Supported Employment (BASE) UK – our CEO and CXO attended the annual BASE conference in November and presented a self-employment skills workshop to supported employment coaches from across the UK. During the rest of the conference, both CEO and CXO actively networked with delegates from a diverse range of backgrounds which 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 partnership working in the community with local charity the Crumbs project teaching food hygiene to our interns, and we continued to enhance our partnership with Marsham Court hotel who are offering valuable work experience opportunities for our interns

3. Advocacy and Policy Influence:

Our SLT continues to actively engage with policy-making bodies, contributing to legislation discussions on employment and disability rights, and our CEO continues in her voluntary role as Chair of the South West Regional Stakeholder Network within Disability Unit in the Cabinet office. This ongoing valuable work has enabled SAMEE to raise its profile, and being mentioned in Parliament in September has resulted in more invitations to take part in various discussion panels at a number of high-profile disability sector events.

4. 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 1 programme that supports young disabled people to gain an accredited self-employment skills qualification continues to scale as a Level 2 is being co-produced and should be ready to launch in 2026.

Supported Self-Employment Internship – With a Year 1 and Year 2 cohort currently onboard, our groundbreaking programme, supporting neurodiverse young people to explore self-employment continues to thrive. The successful elements of the programme include business mentoring, relevant and relatable work-placements, education and holistic support; plus, work towards the accredited Steps Into Self-Employment Level 1 qualification currently impacts a cohort of 22 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 8 Richmond Gardens, Bournemouth, Dorset, BH1 1JE.

6. Trustees, SLT and Principal Adviser

Trustees:

Mr Mike Lammas – Chair

Mr Sak Awan – Vice Chair

Mrs Debbie Porter – Vice Chair

Mr Mark Everard

Ms Jacqueline Shave

Ms Elaine Collinson

Mrs Carly Sidebottom

Ms Sara Brown – Treasurer and Charity Accountant

SLT:

The Chief Executive of the Charity is Mrs Samantha Everard

The Chief Impact Officer of the Charity is Mr Wayne Ingram

The Chief Experience Officer of the Charity is Miss 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 Senior Leadership Team and through them 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 beyond 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 a learning centre in Bournemouth 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 2025, 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 terminates when a young person reaches 25 years old, the support for them falls off of a cliff edge. We believe there is a need for a similar type of structured support that our current 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 new proposed 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 more 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 increasing numbers of disabled people, while using our leverage to influence and advocate on their behalf.

14. Public Benefit

The charity acknowledges its requirement to demonstrate clearly that it must have charitable purposes 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 2025.

	Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds	Prior Year Funds
Incoming Resources					
Income and endowments from:					
Donations & Legacies	£26,642.17	£293,278.41	£0.00	£319,920.58	£298,238.96
Charitable Activities	£0.00	£439,040.22	£0.00	£439,040.22	£286,084.95
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	£4,435.47	£0.00	£0.00	£4,435.47	£3,885.38
Total	£31,077.64	£732,318.63	£0.00	£763,396.27	£588,209.29
Resources Expended					
Expenditure on:					
Raising Funds	£0.00	£0.00	£0.00	£0.00	£0.00
Charitable Activities	£14,731.11	£649,395.06	£0.00	£664,126.17	£548,789.96
Separate Material Item of Expense	£528.50	£1,722.46	£0.00	£2,250.96	£1,924.69
Other	£0.00	£0.00	£0.00	£0.00	£0.00
Total	£15,259.61	£651,117.52	£0.00	£666,377.13	£550,714.65
Net income (expenditure)	£15,818.03	£81,201.11	£0.00	£97,019.14	£37,494.64
Net gain (losses)	£0.00	£0.00	£0.00	£0.00	£0.00
Net income (expenditure)	£15,818.03	£81,201.11	£0.00	£97,019.14	£37,494.64
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	£15,818.03	£81,201.11	£0.00	£97,019.14	£37,494.64
Reconciliation of funds					
Total funds brought forward	£44,099.83	£175,094.92	£0.00	£219,194.75	£0.00
Total funds carried forward	£59,917.86	£256,296.03	£0.00	£316,213.89	£219,194.75

Main Grants	Incoming Resources	Resources Expended	Carry into 25/26
Albert Gubay	£17,500.00	£17,500.00	£0.00
Awards for All	£19,548.00	£6,516.00	£13,032.00
CABWI	£14,195.00	£11,830.00	£2,365.00
Claire Milne Trust	£10,000.00	£3,000.00	£7,000.00
Peoples Postcode Lottery	£23,208.00	£13,538.00	£9,670.00
Powell Family Trust	£13,270.00	£2,211.66	£11,058.34
The Fore	£15,000.00	£15,000.00	£0.00
The National Lottery	£115,613.00	£86,709.75	£28,903.25
Womble Bond Dickinson Foundation	£4,967.00	£3,320.00	£1,647.00

ASSETS

Fixed Assets	Total Fixed Assets	£0.00
Current Assets	Bank Account	£278,525.63
	Paypal	£12.57
	Total Assets	£278,538.20

LIABILITIES

Smallwood Grant Trust Fund	£5,693.23
PAYE Payable	-£157.24
Pension Payable	£122.32
Total Liabilities	£5,658.31

DEBTORS

Account Receivable	£43,334.00
Total Due	£43,334.00

Total Net Assets **£316,213.89**

EQUITY

Net Profit / Loss (prior year(s))	£37,494.64
Net Profit / Loss (current year)	£97,019.14

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

Charity Name
The Samee Charity

On accounts for the year
ended

30 November 2025

Charity no
(if any) 1170328

Set out on pages

9 to 12

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/11/2025

Responsibilities and
basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of The Association of Chartered Certified Accountants.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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: 16.3.26

Name:

Matthew Rogers

Relevant professional
qualification(s) or body

FCCA

(if any):

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Address:

1 Abacus House

Newlands Road

Coraham, Wiltshire, SN13 0BH

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.

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