



ANNUAL REPORT FOR 2020

Phoenix Counselling Service is registered with the Charity Commission as a Charitable Incorporated Organisation (CIO). The Charity Registration Number is 1177399. During 2020 Phoenix Counselling Service continued to carry out its charitable function of providing counselling for adults in Burntwood, Lichfield and the surrounding area who cannot access counselling via the NHS and cannot afford private counselling.

All the trustees, counsellors, volunteers, and support workers within Phoenix are committed to the concept of “counselling for all” and ensure that the service is professional, friendly and caring. Feedback continues to reflect this.

At the end of 2020 there are 8 counsellors who contract to take referrals. Each person who requests counselling is offered up to 7 sessions, unless there is an assessed need for more sessions which can be agreed in order to work ethically and safely. Almost all requests for counselling are self-referrals.

Phoenix has undergone a lot of changes during 2020 partly due to the coronavirus pandemic and partly because of planned development (see Annual Report for 2019). The pandemic led to a big reduction in the number of referrals received and the number of appointments offered, and the counselling moved from face-to-face sessions to online and telephone sessions, in order to conform to the Covid-19 restrictions in place locally and nationally. The processes within the service were revised in order to accommodate the new way of working, and guidelines for non-face-to face work were drawn up and updated regularly. An additional small development has been the change of the Phoenix document heading and logo.

Also there have been major changes in the way Phoenix is managed. At the beginning of the year it was clear that the service needed to develop a different organisational structure and discussions with Sharon McCormack (counsellor and manager of Adeptcentral Counselling and “The Listening Centre”) and John Harborne (counsellor and trustee of Bannersgate Counselling Service) led to the decision that Phoenix needed a part-time manager. This role was advertised to counsellors within Phoenix and Carrie Hinton contracted to start in the role on 1st July, after a 2 month handover period. Carrie took over the contact with clients and counsellors and also developed a website for Phoenix which was launched in July.

In the run up to 1st July, Phoenix started to use WriteUp (a digital management system) to record the information needed for the service including all appointments. This system is GDPR compliant. Although it

proved to be a steep learning curve for everyone setting it up and using it, it has greatly improved the administration of the service.

In October Carrie accepted the offer of permanent work in a local authority organisation and so the manager role was again advertised within Phoenix and Dawn Allison was appointed as manager from 1st November. The development of the wider management role alongside the client and counsellor work is continuing apace.

The waiting list is no longer a problem for Phoenix. Immediately the lockdown was enforced, the number of referrals reduced and remained low until the end of the summer and is now picking up gradually. Other counselling services are reporting a similar situation. Most of those people who were having counselling sessions in March moved to online or telephone sessions although some decided to take a break until face-to-face sessions are available again. Everyone on the waiting list has been offered counselling sessions - most took up the offer. At present only 1 person is on the waiting list to start face-to-face sessions. At this time of increased stress caused by anxiety about the virus, loss of employment, trauma and grief etc. it is assumed that the need for the counselling service has not reduced but that many people are totally focussed on the practicality of getting through each day.

The trustees continue to give invaluable encouragement and support, they met 4 times during 2020, ensuring that Phoenix complies with its charitable status, and helping to think through the development of Phoenix and reviewing the trustee role within this developing service. During the last 2 months two more volunteers have been welcomed into Phoenix and it is hoped that their role as trustees will become clearer during the next few weeks.

We continue to value the financial and management support that Phoenix is given by the Retreat Benevolent Fund and the Coalfields Regeneration Trust, both have provided extra funding during the year which has allowed the development of Phoenix to continue.

Phoenix continues to have an account with the Reliance Bank, who provide a free and ethical banking service. Phoenix is now registered with HMRC and a gift aid claim has been made. We are grateful to Jon Penrose for independently examining the accounts again this year, and for not charging us for his work.

In September Phoenix contracted with a professional fund-raiser who wrote a generic letter of application for grants and completed an online application to Severn Trent Water on our behalf. Unfortunately this application was not successful but the letter is being used.

Development of Phoenix in relation to “aims for 2020” highlighted in the 2019 annual report

□ **Increase the number of counselling hours available**

At the start of 2020, 2 more counsellors started to provide counselling sessions. However the number of referrals has reduced so overall fewer counselling hours have been needed. Whilst it is good to be able to offer appointments soon after a referral is received, it is assumed that this is a temporary situation and the need for counselling remains.

□ **Manage the waiting time for appointments**

This has happened automatically due to the effects of the pandemic.

□ **Fund raising for June onwards**

CRT extended the time limit for the use of its grant until November 2020. They have also given a further grant (from a fund providing finance for the effects of COVID-19) which allows us to continue the service until 31st March 2021. Retreat Benevolent Fund gave a further grant for the costs of the management of the service until 31st December 2020.

□ **Register with HMRC and claim Gift Aid**

The registration is complete and the first claim has been made and the money received.

□ **Explore possibilities of enabling Phoenix to become viable as an organisation -
e.g. either other organisation to take over, individual(s) to run it or alternative.**

This has been a major focus for the service during 2020 as related above. Discussions, initiated by local primary care providers, are underway exploring the possibility of Phoenix contracting with the NHS to provide counselling for patients referred by local primary care services.

□ **Continue the development of the admin and finance roles**

Carole Share has continued to work on the data, using the new WriteUpp system. Pauline Wright has developed the system to be used with the finances. We are very grateful to them for all the hours of work they have put into this.

□ **Review and add to policies e.g. equality and reserves policies**

An equality policy has been written and Dawn is reviewing all the policies.

□ **Review and add to processes e.g. records of counsellors contracting to take referrals, how referrals are screened**

New processes have been developed in order to make best use of WriteUpp. Dawn is in the process of reviewing the records of the counsellors to ensure up to date information is documented.

□ **Work with NHS staff to ensure signposting is appropriate**

Recently telephone contact has been made with the lead counsellor of Wellbeing matters (the IAPT service) and updated written information has been provided for the counsellors. There is ongoing contact with the social prescriber.

□ **Develop a website**

Phoenix has a website www.phoenixcounselling-service.co.uk and also a non-interactive facebook page.

Statistics for 2020

The switch from paper based data collection to digital via WriteUpp in the middle of 2020 has lead to some difficulty in providing accurate for 2020. The use of the system is still developing and all data is now being collected on this system.

Statistics for 2020 with comparison with previous years	2020	2019	2018	2017	2016
Number of appointments attended between 1/7/20 -31/12/20	306	457	343	283	217
Number of referrals.	62	101	107	71	54
Number of people started counselling.	77	85	57	42	36
Number of people completed counselling	59	78	49	40	30
Number of people on waiting list at start of 2020.	17	27	18	8	0
Number of people on waiting list at end of 2020	1	17	27	18	8

Aims for 2021

- Continue the development of the service including the roles of manager, trustees and volunteers
- Further develop use of WriteUpp
- Work towards Phoenix becoming a financially sustainable service
- Fundraising
- Explore possible contracting with the NHS

An extra word!

Having established Phoenix Counselling Service, it is now a pleasure to be handing the management on to Dawn. However I want use this annual report to say thank you to everyone who has been involved in the organisation during the last 5 years and without whom Phoenix would not have developed. So my thanks go to the trustees for their endless commitment, encouragement and work; the counsellors for providing the counselling sessions, their commitment to the ethos of affordable counselling and their “ungrumbling” approach to the extra work involved in the changes that have been made; and our 2 volunteers who have taken on a great deal of work within the service. Also thank you to our funders, who have not only provided funding but also have provided support workers who have given us practical support.

Rhoda Wharton
(Counsellor – registered MBACP (accred))

January 2021

PHOENIX COUNSELLING SERVICE

Income and expenditure statement 2020		2020	2019	2018	2017	2015 & 2016 combined
		£	£	£	£	£
Current assets						
Cash		0.00	0.00	0.00	140.00	20.00
Bank		14176.40	10786.25	1974.87	79.00	0.00
Total assets		<u>14176.40</u>	<u>10786.25</u>	<u>1974.87</u>	<u>219.00</u>	<u>20.00</u>
Creditors		0.00	0.00	0.00	- 177.45	- 108.00
Net Assets		<u>14176.40</u>	<u>10786.25</u>	<u>1974.87</u>	<u>41.55</u>	<u>- 88.00</u>
Fund 31.12.19 brt fwd		10786.25	1974.87	41.55	- 88.00	0.00
Cashbook totals						
	Total income	20137.38	15381.00	5396.87	2160.73	1,850.00
	Total expenditure	<u>16747.23</u>	<u>6569.62</u>	<u>3463.55</u>	<u>2031.18</u>	<u>1,938.00</u>
Total income over expenditure		3390.15	8811.38	1933.32	129.55	- 88.00
Fund c/fwd 31/12/20		<u>14176.40</u>	<u>10786.25</u>	<u>1974.87</u>	<u>41.55</u>	<u>- 88.00</u>
Income						
Counselling Sessions		3705.00				
Grants & Donations		16393.87				
Other		38.51				
Total		<u>20137.38</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Expenditure						
Counsellors		10310.00				
Management & WriteUpp		4900.95				
Other Admin & utility		1536.28				
Total		<u>16747.23</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>