



Beyond Reflections

AGM 12th November 2022



Chair of Trustees Report

2022 AGM – Beyond Reflections

What are Trustees?

Trustees are the people who share ultimate responsibility for the governing of Beyond Reflections and directing how it's managed and run.

Our current trustees are:

- * Jenny Harvey
- * Jon Wallace
- * Melissa Tilling
- * Paul Draycott
- * Samantha Cartwright
- * Scott Johnson

The current board is 100% comprise of volunteers.

We then have Andi, as the CEO, and their fantastic team of staff and volunteers, to deliver the services.



Current Challenges

Beyond Reflections has face a number of issues in the past year, including:

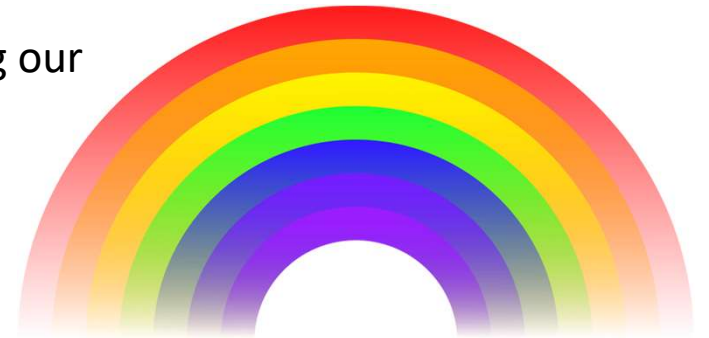
- Continued Squeeze on the NHS
- COVID-19
- Government Changes
- Hostile Media Environment
- Increased costs



What's Been Happening?

It's not all doom and gloom. We are resilient and have achieved a lot.

- Rebranding – We've become Beyond Reflections. From updating our name, creating a new website, and everything that goes with it. We've maintained our strategic direction, but refined our operations.
- Continuation of service - We haven't stopped, and continue to deliver a fantastic service.
 - Being a "Voice of Experience", providing education and support.
 - Being a safe place for members, and by focusing on support, and not activism
- Building Reach – Working with other charities and organisations to help a greater support network for our members.



What's Been Happening?

- We've reopened our office in Southampton and employed new staff.
- Restarted face to face counselling and wellbeing sessions in Southampton
- Adapted our services to ensure as many people are supported as possible.
- Improved our systems in the office and communications.
- New and improved policies





Chief Executive's State of the Nation

Andi, a cautious optimist



Contents

- Fundraising
- Pride
- New website
- New staff
- Grant outlook
- Business Plan refinements
- Continuing to expand
- Civi
- EDI policy

Fundraising

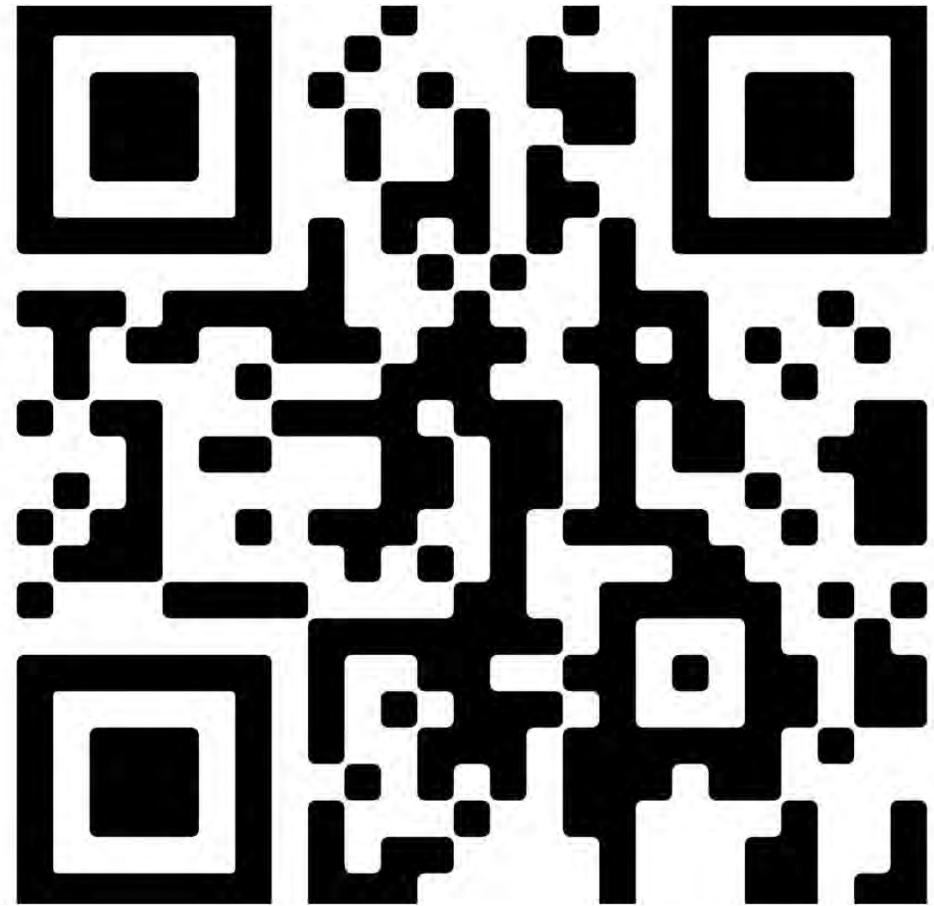
Urgent need for funds

<https://www.justgiving.com/campaign/BeyondReflections22-23>

Total raised since we launched our appeal at the start of October £728 (JG) + Patricia to give amount

Total raised first half of year £5053 – shout out to Markerstudies who raised £1300

Reviewed staffing and resources



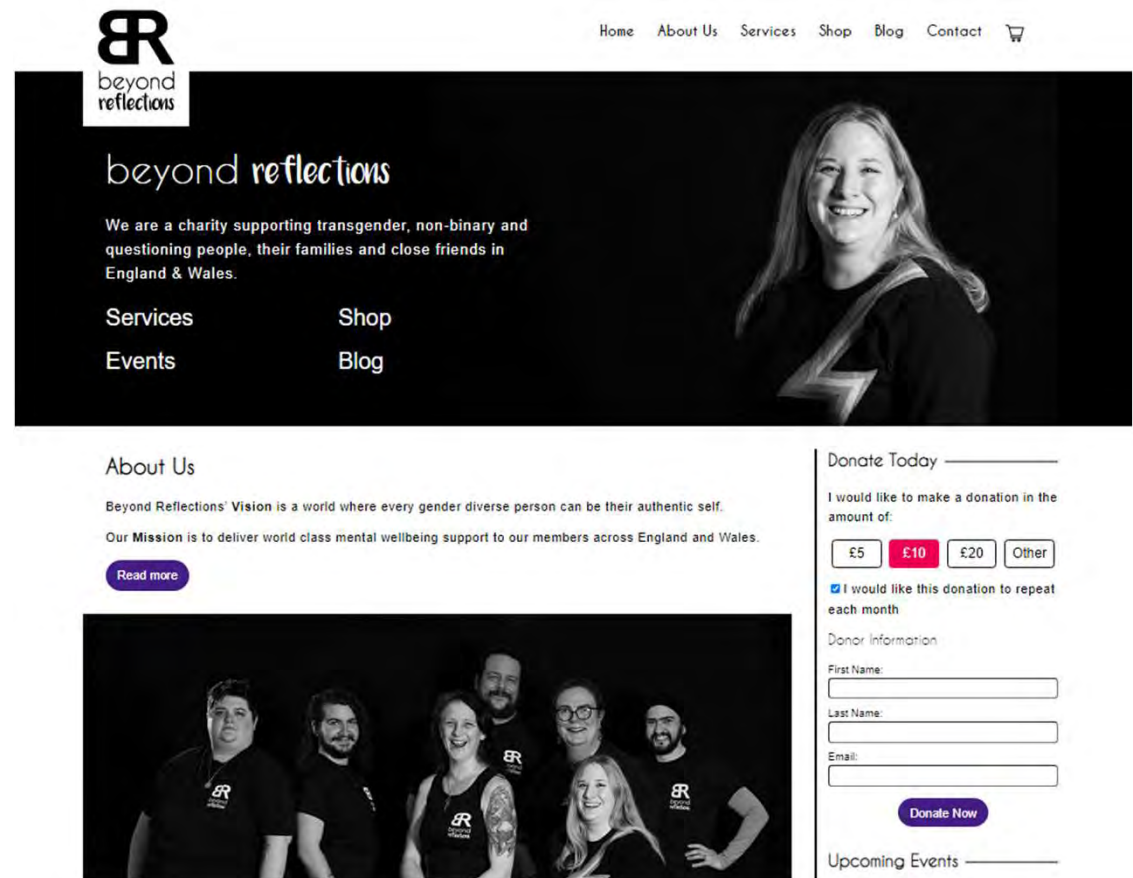
Pride

- Amazing to be back out
- Connecting with new members, volunteers and supporters across four counties
- Ambitious and successful
- Abigail will give more information



New Website

- Professional, fast, easy to navigate
- Donation link prioritised
- Clean and crisp
- Runs on 100% renewable energy
- Produces 0.538g of CO2 per visit, old site 6.4g per visit
- Accessibility widget
 - Can change font size, font colour, background colour and button colours
 - crosshair feature
 - coded for screen readers
- Google efficiency 99% on desktop, 84%% on mobile devices, old site 68% and 17%



Grant Outlook

- Beyond Reflections Against Cancer
 - £3700 for raising awareness of the importance of cancer screening with members and surveying people's experiences of cancer screening
 - Current bid for Developing Community Researchers and Whatever It Takes
- Awards for All £10k, successful
- HIWCF for £5k, at stage 2
- Steel Charitable Trust (for 2023-2024 salaries)- stage 1 submitted
- Year five of National Lottery Reaching Communities grant for 23-24, application for second set of funding to be submitted (~£62k)
- Tudor ends this year, can't reapply – their rules – support new ideas



Business Plan refinements

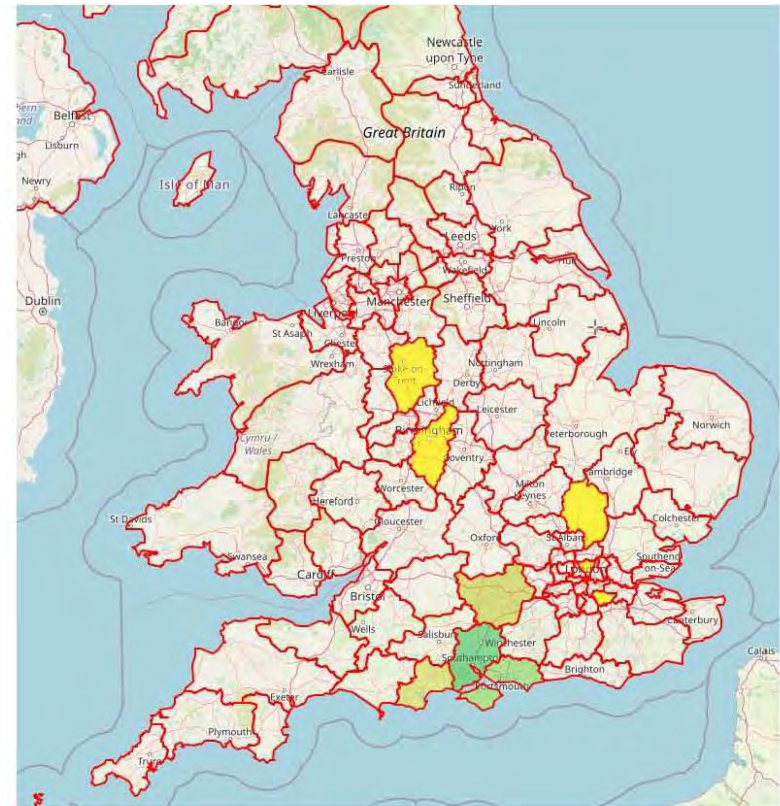
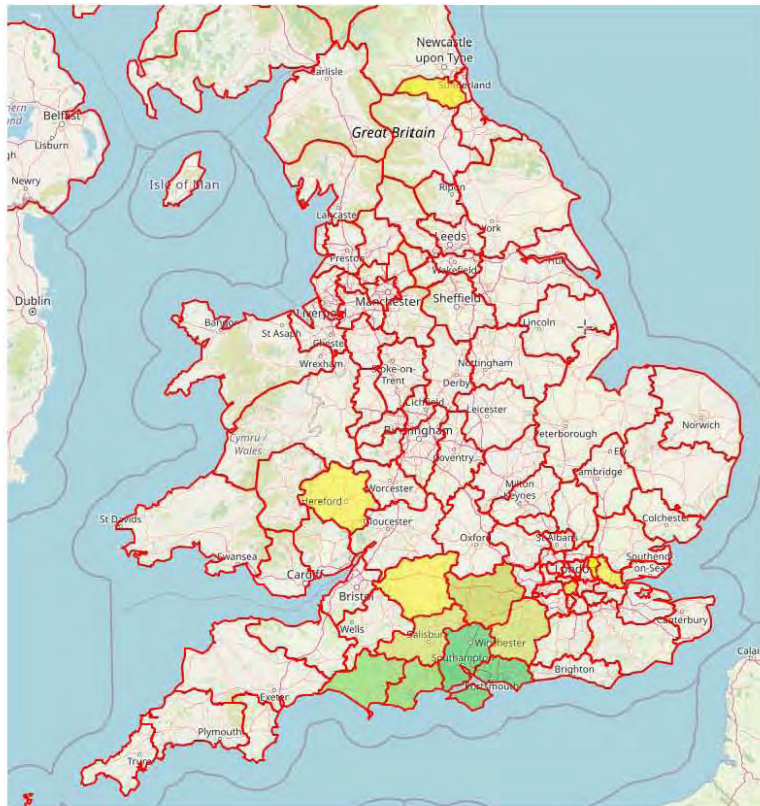
- Continue to work on strengthening services
 - The cost of mental wellbeing
- Board recommended focus on home area for F2F, not national expansion
- Income growth not as projected
- Business development projects took longer than expected
- Opened face-to-face locations for therapy but not for support groups
 - Lack of volunteers
- Improving support for volunteers
 - Single session therapy pilot



National Vision

- Still building on our success
- Small but punching above our weight
- Covid put brakes on our development through networking, that's now coming back
- Wellbeing report

National





Upcoming Events

- Trans Awareness Week 13th – 19th November
 - Share our content on social media
 - Fly the Trans Flag to show that allies are everywhere
- Transgender Day of Remembrance 20th November
- Beyond Reflections Against Cancer Your Experiences survey
 - January 2023
- Trans Day of Visibility 31st March
- Transparency Conference
 - Wednesday 12th April, Bournemouth University

2022 Executive Report

Prepared by Andi Maratos



beyond
reflections

Private and Confidential

Overview

2022 was another year of hard work and great successes for Beyond Reflections culminating in our rebranding and launch of the new national business plan at the AGM.

In 2022 each month Beyond Reflections supported on average 172 members through: 21 support groups, 2 wellbeing drop-ins and 87 counselling sessions delivered by 48 volunteers.

Our members continue to achieve significant goals through our support, being empowered to make healthy decisions about their future. We have delivered more support than ever and have the processes in place to ensure consistently high service standards.

Our volunteers donated significant amounts of time and expertise, and many achieved professional landmarks and qualifications. Our volunteer training has been standardised and streamlined. Providing all volunteers, whatever their role, with a full induction into Beyond Reflections operations.

Significant work has been carried out within the administration of Beyond Reflections. New staff roles have been created and the team ended the year at full strength with eight staff: CEO, Operations Manager, Finance Officer, Volunteer Coordinator, Member Experience Officer, Projects and Events Administrator, and Counselling Administrator. This team provide the structure and support necessary to deliver the services and to promote Beyond Reflections nationally.

HR processes and procedures have been strengthened with a full revision of the staff handbook and a two-week induction put in place for new staff.

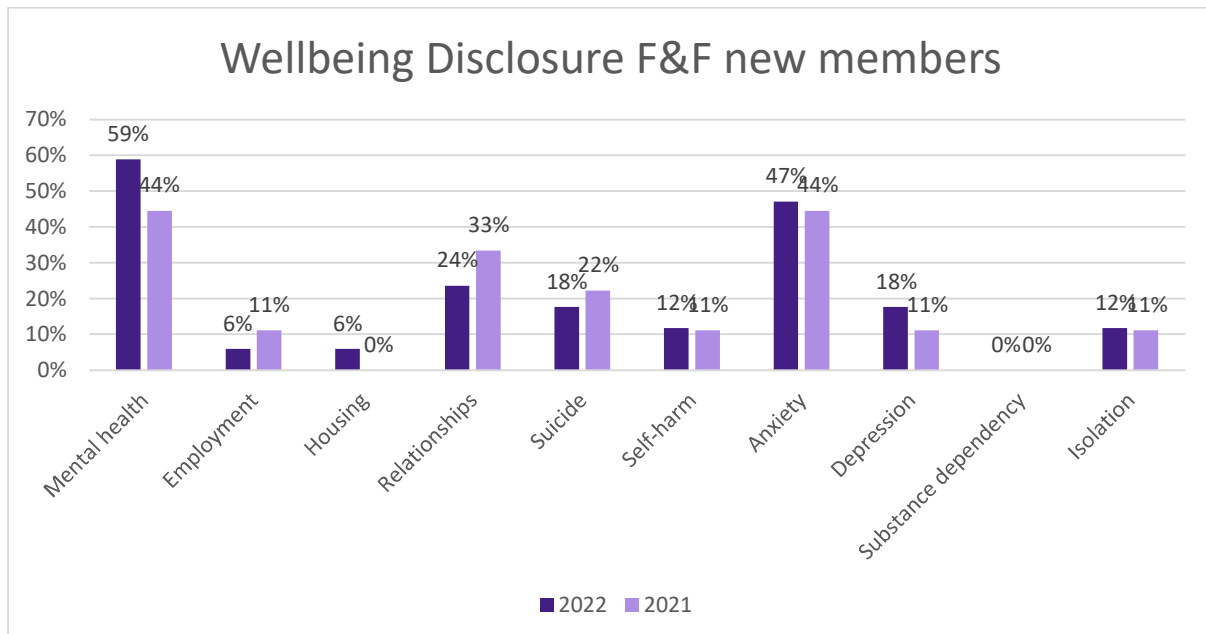
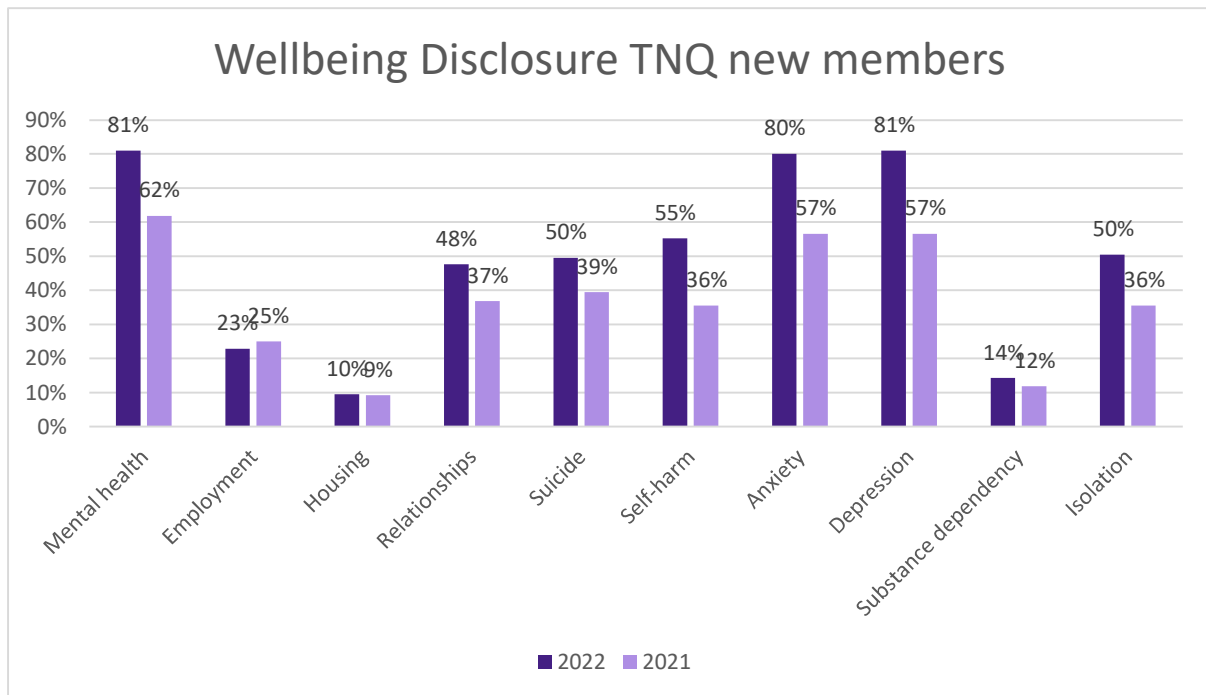
The year brought several additional challenges. Some of which can be attributed to the second year of the pandemic, others to growing and learning as a charity. We have not been able to add to our funds through events. Working during the pandemic required a lot of time and learning on the part of the whole team to work effectively online. There was a significant increase in the training and support needed by staff and volunteers as well as cultural changes needed for staff to collaborate in this space. The loss of the shared working environment has had an impact on the causal sharing of information which keeps a team on vision. Lessons have been learnt around supervision of remote staff and volunteers as well as the need to accurately specify projects before starting.

The increase in complexity of the work resulted in the majority of Beyond Reflections' expenditure being refocused into staffing. This will continue into 2023, requiring a revision to the purpose of the Reaching Community grant to cover more core costs.

Activities

Wellbeing Statistics

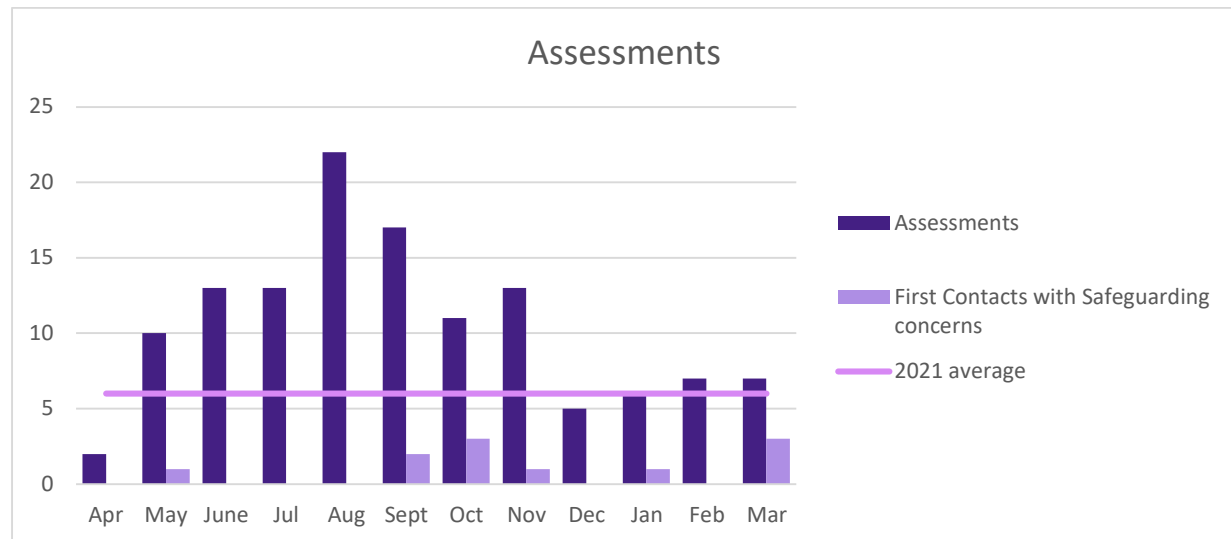
The overall wellbeing of incoming members has decreased since last year. Resulting in a greater demand for our services and more challenging cases being presented for our volunteers.



The number of people requiring our services has continued to increase. This is due to the increase in our reputation and reach, and an increase in need for our services due to the increased waiting times for the GICs and the increasingly transphobic

culture in the UK which exacerbates gender dysphoria as shown in the [Galop Transphobic Hate Crime Report 2020](#).

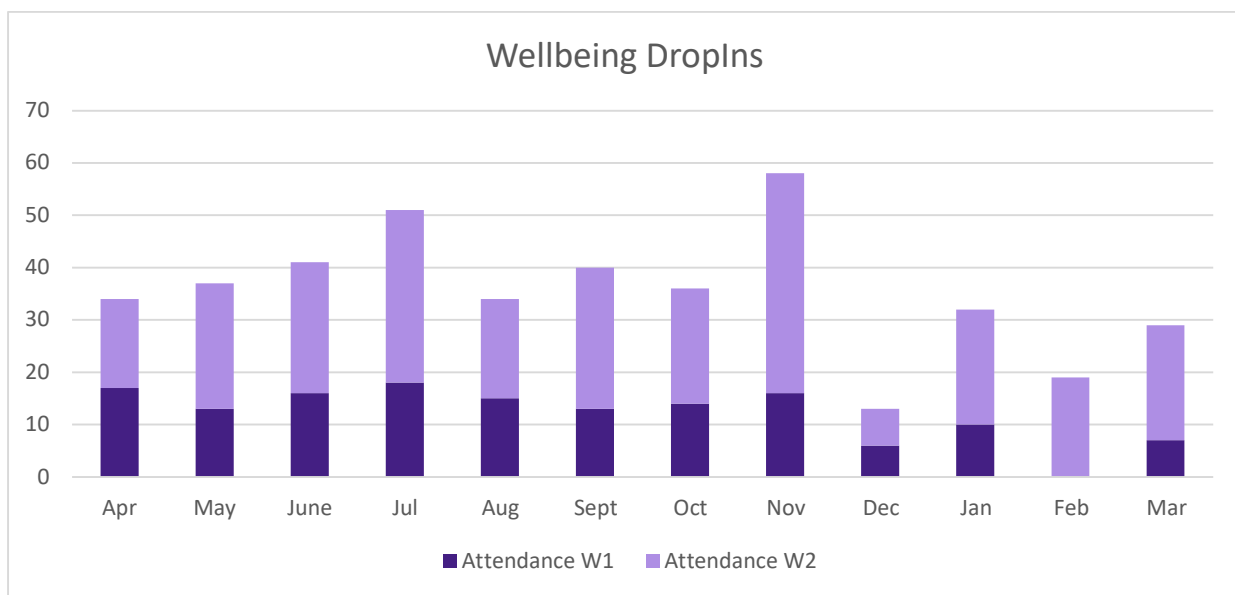
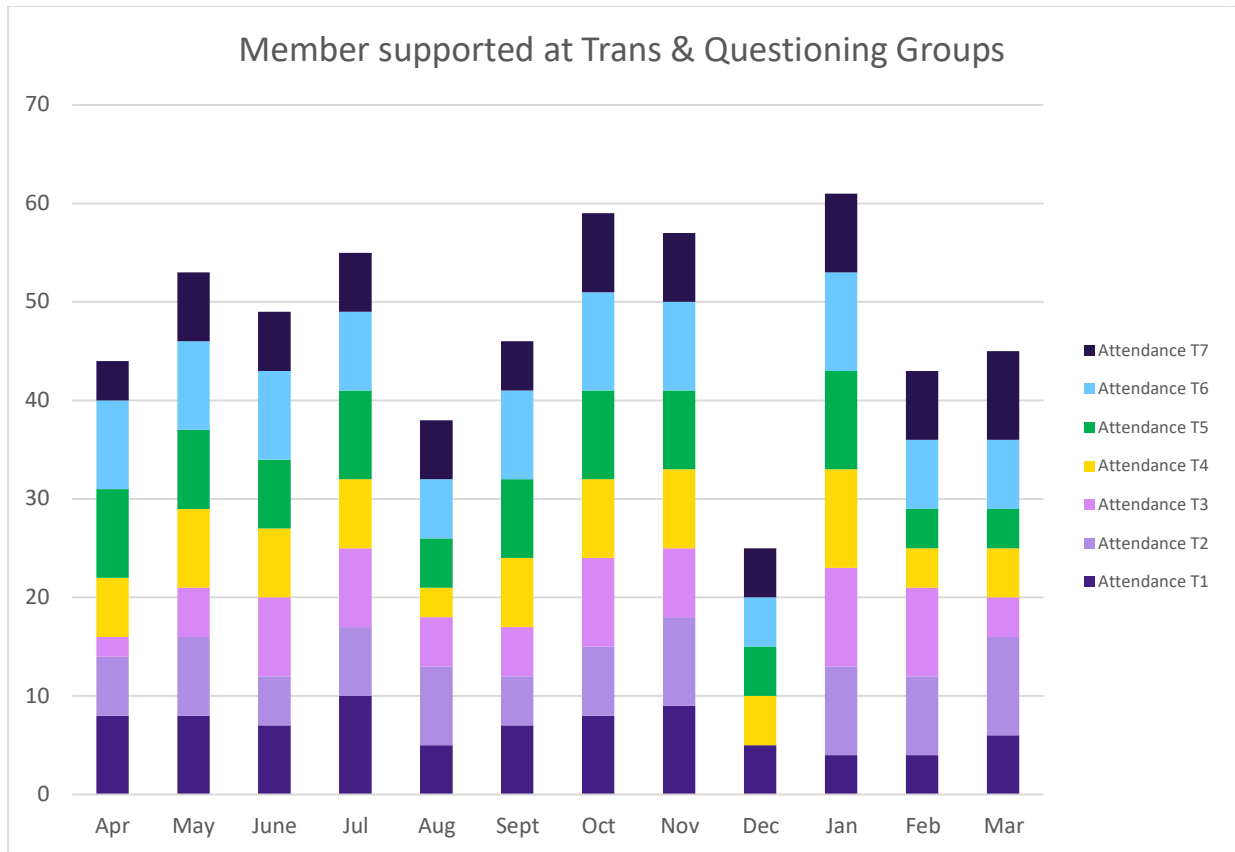
The graph below shows the number of assessments carried out in 2022, contrasted to the average in 2021. The peaks in August, September and November are linked to our summer fundraiser, Southampton Pride and our Allies Awareness campaign Fly the Trans Flag which runs during November and links with Trans Day of Remembrance.

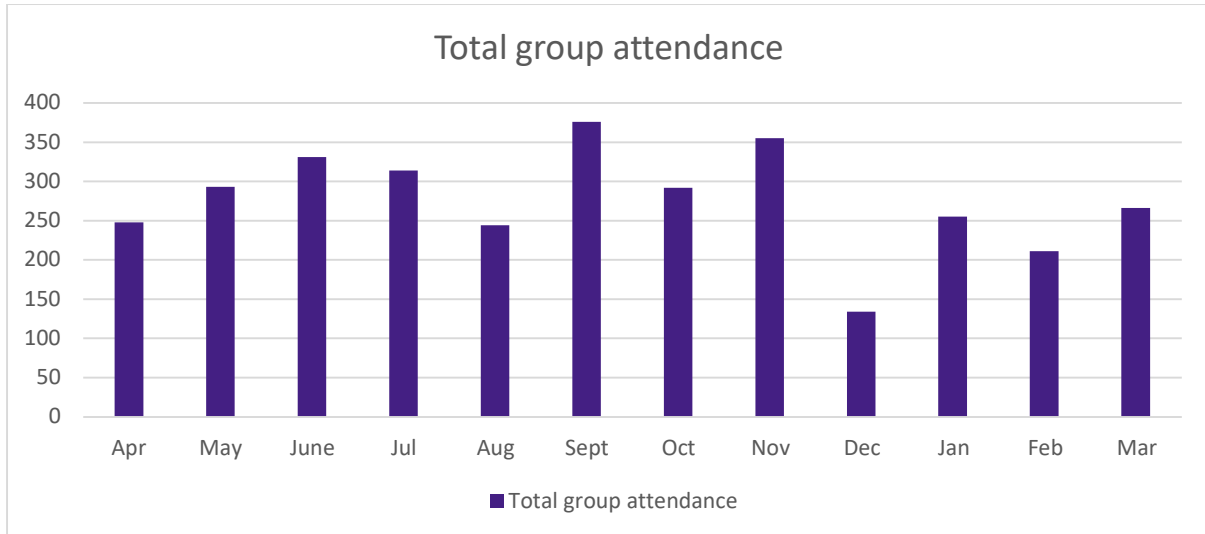


Support Groups

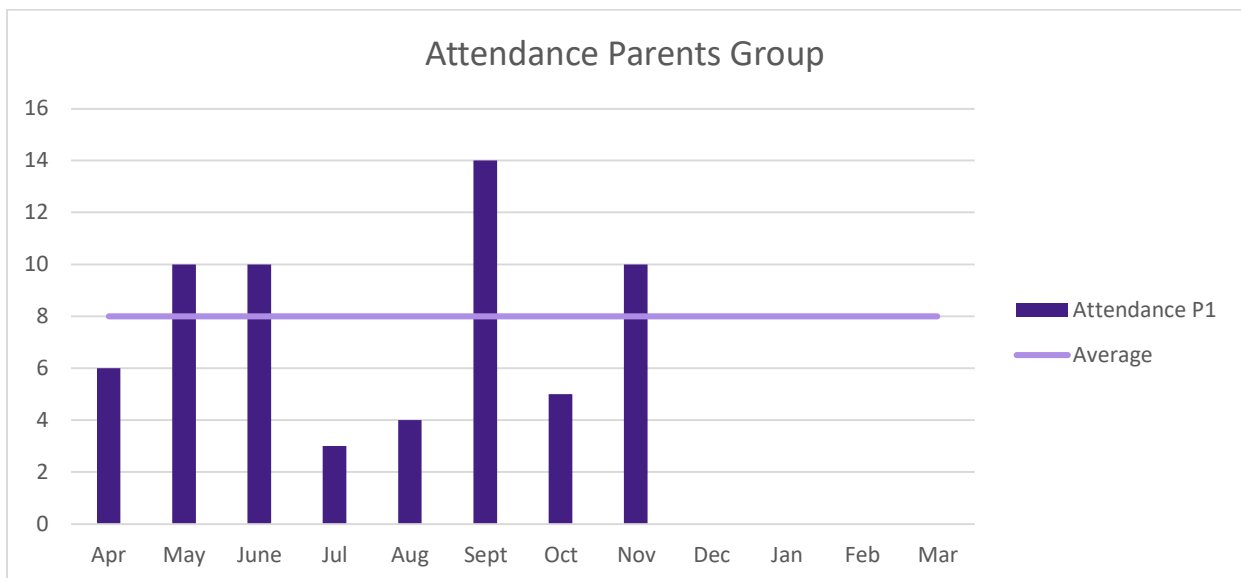
Beyond Reflections has more members and more support groups than ever. The hardcore of volunteers delivering support groups has been strengthened through continual recruitment and despite the loss of our volunteer coordinator in the summer.

A massive thank you to the hardcore of Core Service Delivery support group volunteers who kept the groups running during December. Both August and December have been identified as months where volunteers and members are often on holiday. This is now made explicit in member and volunteer documentation, allowing for planned partial downtime during these months.

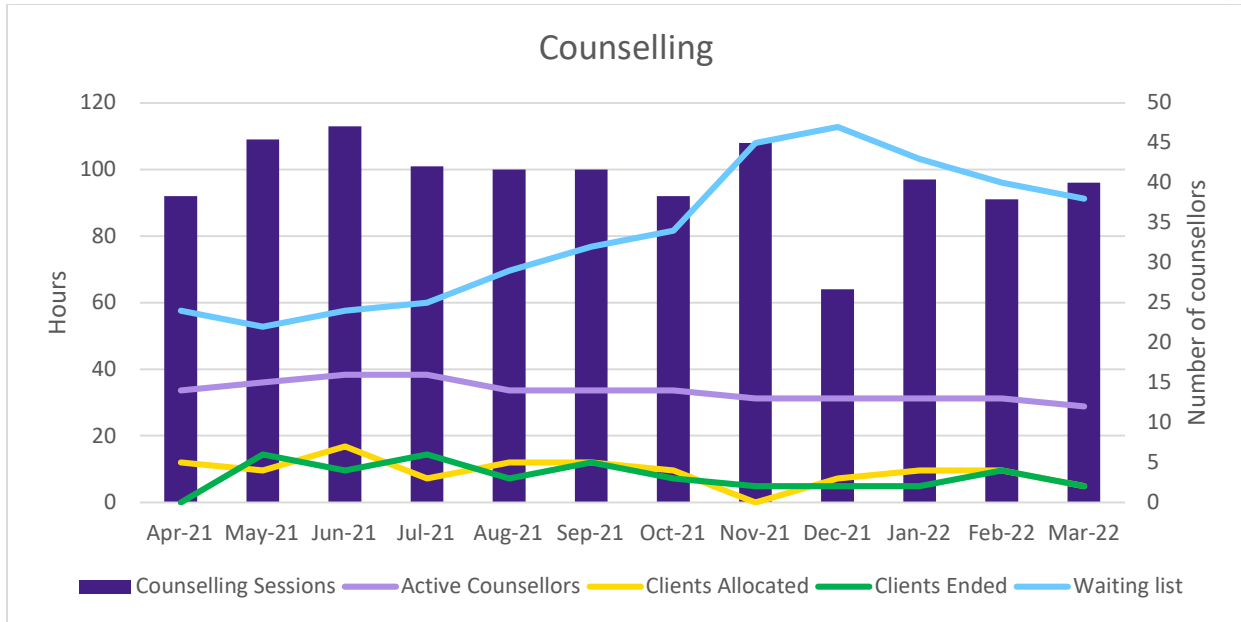




The parents' group was running well until the departure of our second facilitator. This shows we have strong demand and a great service. A new facilitator is being trained and this group should restart in September.



Counselling



Counselling sessions are the same as 2021, an average of 87 per month with the number of counsellors averaging 14. New counsellors are being recruited but supervision remains the bottleneck. Trained counsellors are leaving once they have completed their placement hours. Work is in progress to see if we can support them back into the service after a break rather than losing them entirely.

The waiting list continues to rise.

Volunteers

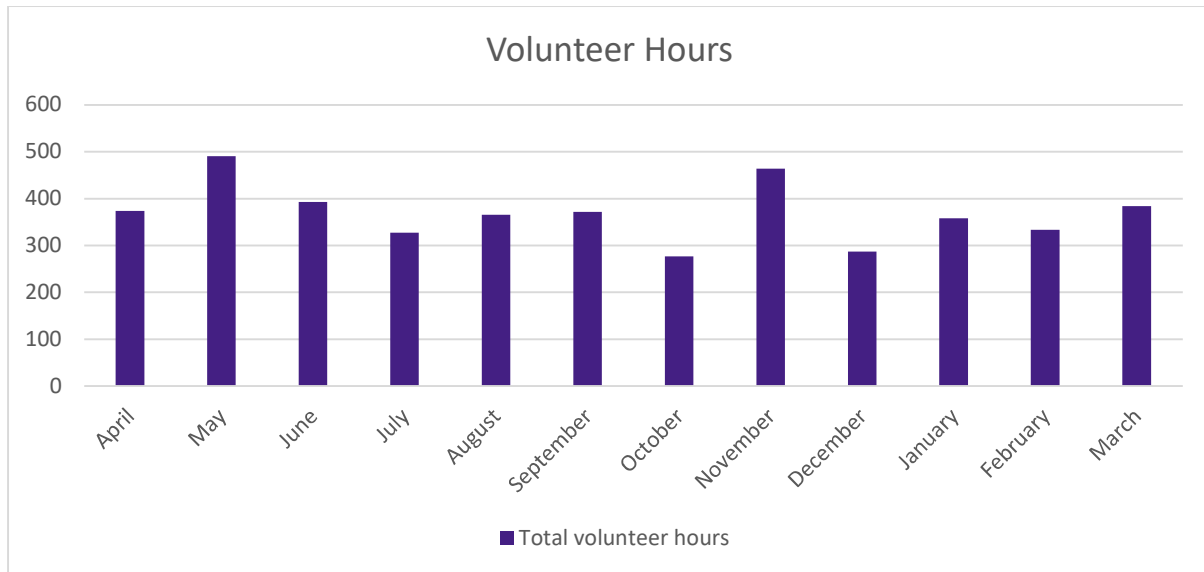
The role of the Volunteer Coordinator (VC) is critical to the operation of Beyond Reflections. Unfortunately, in 2022 this role was unfilled from August to January leaving recruitment, welfare, and training of all volunteers to the Operations Manager (OM), Member Experience Coordinator (MXC), and the Head of Counselling. It is testament to the dedication of these team members, with the support of our volunteer counselling supervisor that volunteer recruitment and training continued, additional support groups were developed and the threefold increase in membership enquiries was managed so well.

Volunteer recruitment

A review of volunteer recruitment with the VC, MXC, CEO and Social Media Officer (SMO) identified the application process as the key barrier to recruitment. Enquiries were coming in but not being converted into applications. The Word application form was converted to a Smart Survey:

<https://www.smartsurvey.co.uk/s/BRVolunteerApplication/> with immediate results.

Unfortunately, quantitative data was not captured during most of this period due to the staffing issues.



- Total volunteer hours donated 2022 was 4425,
- This is a 30% decrease from 2021. The most significant loss was that of adhoc volunteering which should have come from the Summer Fundraiser.
- Total value of the volunteer hours donated was £66,991 based on the ONS value of £15.14 per hour

Summary of the Highlights and Challenges of year

Highlights

- The launch of the new business plan, name and branding at the AGM was the culmination of six months of hard work. The logo, designed by a member, has been highly commended as a professional piece of work. The work energised the charity to move forward and clarified objectives. Rebranding has had significant impact on our reputation nationally which has led to more connections and more engagement.
- Southampton Pride was a great success, and very nice for the team and members to meet in person. The number of interactions and member and volunteer signups were commensurate with previous years.
- For most of 2022 Beyond Reflections staff continued to work online however returning to Face-to-Face was a priority. Reopening our Southampton wellbeing group in February and opening counselling at our Southampton office strengthened our contacts with our members. Managing our staff making the transition back to working in an office brought challenges and benefits, not least being able to conduct the induction of new staff in our office in Southampton.
- Counsellor Away Day – a Saturday training event which brought together the whole counselling team in a face-to-face space for training and socialising. Very successful and to be repeated six monthly.
- Volunteer training and development refined and is producing excellent results.
- The implementation of monthly operations meetings and the collection and presentation of data by the team has led to significant improvements in communication and in process control. Improvements include monthly volunteer celebrations, the six-monthly member review process and regular feedback from social media about our reach.

Challenges

- Get Fit for Chrysalis #GF4C – This was our summer fundraiser introduced to replace Tour de Trans when it became evident that the lead rider was unable to deliver the project. It should have been a good replacement, with staff and volunteers signing up and engaged but the loss of our social media officer for most of the summer meant we couldn't maximise reach and keep runners engaged. The event achieved about 25% of target

- Data Protection breach – the investigation and handling of the breach and ongoing issues created by the further actions of the former volunteer concerned cost us severely.
- Trans Day of Visibility (31st March 2022) fundraiser. This was unsuccessful as a fundraiser but hit reputation targets through increasing our number of followers. Lessons learnt from this have strengthened our Project and Events processes

Future funding

Beyond Reflections' budget for 2022 was cautious. The charity had funds but the external situation was perilous. This means we enter 2023 with sufficient security to continue with our plans however the charity urgently needs to access additional grant funds.

Funding with Tudor Trust of the CEO salary ends in May 2023. The National Lottery Reaching Communities fund has been used to cover staffing and office costs and a revised budget will be prepared for years 4 and 5 of the grant.

The future of the charity relies on our fundraising efforts through events and through additional grant funding.

About Beyond Reflections

We are Beyond Reflections, a mental wellbeing charity operating in England and Wales. Supporting trans, non-binary, and questioning adults, their family, and friends.

Additional information

Beyond Reflections is a registered charity (1187351) providing safe, confidential spaces in England and Wales for trans+ people, their family, and friends to meet with peers; engage in counselling; participate in facilitated group work and to attend workshops.

We are a third-party hate crime reporting centre and provide training, networking, outreach and consultancy services to the public and private sector.

Check out our website for more information and contact the office info@beyond-reflections.org.uk or on 03448 468 545 to speak to one of the team.



Registered Charity 1187351

Beyond Reflections, Unity 12, 9-19 (odds) Rose Road, Southampton, SO14 6TE

www.beyond-reflections.org.uk, 03448 468545, info@beyond-reflections.org.uk

BEYOND REFLECTIONS

(On 27th November 2021 formal name change from Chrysalis)

CHARITY NUMBER 1187351**ANNUAL ACCOUNTS for the YEAR ENDED 31st MARCH 2022**

STATEMENT of FINANCIAL ACTIVITIES	NOTE	2022	2021
INCOME			
Donations and legacies	3	31491	113184
Charitable activities	3		
Other trading activities	3	5502	5674
Interest received		7	0
Other			
		<u>37000</u>	<u>118858</u>
EXPENDITURE on:			
Staff costs	4	85262	73790
Other	4	35522	27080
		<u>120784</u>	<u>100870</u>
Net income/(expenditure)		-83784	17988
Extraordinary items		0	0
Other gains/(losses)		0	0
		<u>-83784</u>	<u>17988</u>
Net movement in funds			
RECONCILIATION OF FUNDS			
Total funds b/fwd		51485	29015
Prior Year Adjustment		0	4482
TOTAL FUNDS c/fwd		<u><u>-£32,299</u></u>	<u><u>£51,485</u></u>

BEYOND REFLECTIONS

(On 27th November 2021 formal name change from Chrysalis)

CHARITY NUMBER 1187351**ANNUAL ACCOUNTS for the YEAR ENDED 31st MAR 2022**

BALANCE SHEET	Note	2022	2021
FIXED ASSETS			
Tangible Assets	5	4959	3791
Total fixed asset s		<u>4959</u>	<u>3791</u>
CURRENT ASSETS			
Debtors and prepayments	6	2592	358
Stocks		2078	0
Cash at bank and in hand	7	48669	60537
Total current assets		<u>53339</u>	<u>60895</u>
CREDITORS			
Amounts falling due within one year	8	4197	65
NET CURRENT ASSETS		<u>49142</u>	<u>60830</u>
TOTAL NET ASSETS		<u>£54,101</u>	<u>£64,621</u>
CHARITY FUNDS			
RESERVES		52600	51485
Restricted funds		1500	9707
Unrestricted funds		0	3431
TOTAL FUNDS		<u>£54,100</u>	<u>£64,623</u>

Signed by on behalf of all the trustees:

Signature

Print name

Date of approval

ANNUAL ACCOUNTS for the YEAR ENDED 31st MARCH 2022

NOTES TO THE ACCOUNTS

NOTE 1 1.1 BASIS OF ACCOUNTING

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated.

The accounts have been prepared in accordance with the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and with the Charities Act 2011

1.2 GOING CONCERN

There are no material uncertainties relating to events or conditions that cast significant doubt on the charity's ability to continue as a going concern

NOTE 2 2.1 INCOME

Recognition of income

These are included in the Statement of Financial Activities (SoFA) when: the charity becomes entitled to the resources and it is more than likely than not that the trustees will receive the resources; and the monetary value can be measured with sufficient reliability

Offsetting

There has been no offsetting of assets and liabilities, or income and expenses, unless required or permitted by the FRS 102 SORP or FRS 102

Grants and donations

Grants and donations are only included in the SoFA when the general income recognition criteria are met (5.10 to 5.12 FRS102 SORP)

Tax reliefs on donations and gift

Gift Aid receivable is included in income when there is a valid declaration from the donor. Any Gift Aid amount recovered on a donation is considered to be part of that gift and is treated as an addition to the same fund as the initial donation unless the donor or the terms of the appeal have specified otherwise

Volunteer help

The value of any voluntary help received is not included in the accounts but is included in the trustees annual report

Income from membership subscriptions

Membership subscriptions received in the nature of a gift are recognised in Donations and Lagacies

2.2 EXPENDITURE

Liability recognition

Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable clarity

Deferred income

No material item of deferred income has been included in the accounts

Creditors

The charity has creditors which are measured at settlement amounts less any trade discounts

Provisions for liabilities

A liability is measured on recognition at its historical cost and then subsequently measured at the best estimate of the amount required to settle the obligation at the reporting date

2.4 ASSETS

Tangible fixed assets

These are capitalised if they can be used for more than one year and are depreciated over their expected useful lives at the following annual rates:

fixtures and fittings	20%
equipment	15%
computers	33%

Stocks

Stocks held for sale as part of non-charitable trade are measured at net realisable value.

Debtors

Debtors are measured at the cash or other consideration expected to be received

BEYOND REFLECTIONS

(On 27th November 2021 formal name change from Chrysalis)

CHARITY NUMBER 1187351**ANNUAL ACCOUNTS for the YEAR ENDED 31st MARCH****2022****NOTES TO THE ACCOUNTS****NOTE 3 ANALYSIS OF INCOME**

	Unrestricted funds £	Restricted funds £	2022 £	2021 £	
Donations and legacies :					
Donations and gifts	10515	0	10515	13164	
Gift Aid					
General grants	11838	0	11838	4200	
the National lottery Community Fund					
Reaching Communities	0	54900	54900	50708	
Tudor Trust	0	30000	30000	40000	
Membership subscriptions	8620	0	8620	4795	plus £50
(which are, in substance, donations)					
Other	518	0	518	317	
	<u>31491</u>	<u>84900</u>	<u>116391</u>	<u>113184</u>	
Charitable activities					
Other trading activities:					
Merchandise sales	496	0	496	492	Plus £110
Conference ticket sales	0	0	0	3576	
Training and counselling	5006	0	5006	1606	plus £366
	<u>5502</u>	<u>0</u>	<u>5502</u>	<u>5674</u>	
TOTAL INCOME	<u><u>£36,993</u></u>	<u><u>£84,900</u></u>	<u><u>£121,893</u></u>	<u><u>£118,858</u></u>	

BEYOND REFLECTIONS

(On 27th November 2021 formal name change from Chrysalis)

CHARITY NUMBER 1187351**ANNUAL ACCOUNTS for the YEAR ENDED 31st MARCH 2022****NOTES TO THE ACCOUNTS**

NOTE 4	ANALYSIS OF EXPENDITURE	2022 £	2021 £
	Staff costs:		
	Salaries and wages	81770	72065
	Social security costs	1394	521
	Pension costs (defined contribution scheme)	1258	1204
	Recruitment costs	840	0
		<u>85262</u>	<u>73790</u>
	Other:		
	Staff and volunteer training	1492	
	Rent, rates and service charge	15884	12699
	Meeting centre	442	0
	Insurance	844	723
	Legal and professional fees	6204	1800
	Telephone	1045	926
	Printing, postage and stationery	442	277
	Equipment	60	1234
	Computer licenses and web hosting services	1495	1221
	Website development	1500	0
	Software development	2270	3000
	Computer consumables	1088	0
	Marketing, promotions and projects	1086	3736
	Less: stock	-2078	0
	Travel costs	329	-78
	Miscellaneous expenses	968	180
	Sundry expenses	606	0
		<u>33677</u>	<u>25718</u>
	Financial costs;		
	Bank charges	61	0
	Fundraising platform fees	217	0
		<u>278</u>	<u>0</u>
	Depreciation:		
	Fixtures and fittings	286	548
	Equipment	196	814
	Computer	1085	0
		<u>1567</u>	<u>1362</u>
	TOTAL EXPENDITURE	<u><u>£120,784</u></u>	<u><u>£100,870</u></u>

CHARITY NUMBER 1187351

ANNUAL ACCOUNTS for the YEAR ENDED 31st MARCH 2022

NOTES TO THE ACCOUNTS

NOTE 5 TANGIBLE FIXED ASSETS

	Fixtures & fittings	Equipment	Computers	TOTAL
COST or VALUATION				
Balance b/fwd	1896	1335	1922	5153
Additions during year	758	-	1977	2735
Disposals during year				
Balance c/fwd	<u>2654</u>	<u>1335</u>	<u>3899</u>	<u>7888</u>
DEPRECIATION				
Balance b/wfd	548	174	640	1362
Provison during year	286	196	1085	1567
Provison on disposal				
Balance c/fwd	<u>834</u>	<u>370</u>	<u>1725</u>	<u>2929</u>
NBV as at :				
31st March 2022	<u>£1,820</u>	<u>£965</u>	<u>£2,174</u>	<u>£4,959</u>
31st March 2021	<u>£1,348</u>	<u>£1,161</u>	<u>£1,922</u>	<u>£3,791</u>

NOTE 6	DEBTORS AND PREPAYMENTS	2022 £	2021 £
	Prepayments accrued income	2430	358
	Other debtors	162	0
		<u>£2,592</u>	<u>£358</u>

NOTE 7	CASH AND BANK IN HAND	2022 £	2021 £
	Deposit account	40594	54587
	Current account	6115	3336
	Paypal	1941	2235
	Petty cash	19	379
		<u>£48,669</u>	<u>£60,537</u>

NOTE 8	CREDITORS AND ACCRUALS	2022 £	2021 £
	Trade creditors	2995	0
	Accruals and deferred income	24	65
	Taxation and social security	1178	0
		<u>£4,197</u>	<u>£65</u>

The mental wellbeing charity supporting trans, non-binary and questioning adults, and



their family and friends.

BEYOND REFLECTION ACCOUNTS 2021-22

APPROVED BY MEMBERS AT AGM ON SATURDAY 12th NOVEMBER 2022

ACCOUNTS INDEPENDENTLY EXAMINED AND APPROVED

FORMAL WRITTEN OPINION OF 2021-22 ACCOUNTS TO FOLLOW SHORTLY

Beyond Reflections, Unity 12, 9-19 (odds) Rose Road, Southampton, SO14 6TE

www.beyond-reflections.org.uk, 03448 468545, info@beyond-reflections.org.uk



Registered Charity 1187351