



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

**From** 01/04/2022    **Period start date To** 31/03/2023    **Period end date**

**Charity name:** See Me Be CIO

**Charity registration number:** 1188359

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>The objects of the CIO are to relieve the needs of adults with a learning disability in the County of Wiltshire, including by the following means:</p> <p>Promoting inclusion for the public benefit and preventing people with a disability from being excluded;</p> <p>Providing information and support to those disabled persons, their families and carers; and</p> <p>Relieving unemployment in such disabled persons.</p> <p>For the purposes of this clause, 'socially excluded' means being excluded from society, or part of society, as a result of being a member of a group who are likely to be subject to discrimination on the grounds of disability.</p>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>In June and July 2022 we worked with an HR Consultant to ensure we had all necessary policies in place to enable our recruitment and employment of a Job Coach. This included development of an Employment Agreement, Employee Checklist and Health and Safety Policy.</p> <p>In July and August 2022 we worked with a GDPR Consultant to ensure we were proactive in managing our GDPR legal requirements. We developed a Record of Processing Activities (ROPA), Employee Privacy Notice and an easier to read Privacy Notice, with the intention of this being more accessible to people with a learning disability.</p> <p>In August 2022 we worked with an IT Consultant to source and install an encrypted laptop to meet the IT and governance requirements of See Me Be CIO.</p>

		In August 2022 we recruited our first Job Coach, who has met with adults with a learning disability to facilitate their access to paid employment, worked with statutory services including staff at local Job Centre's. The Job Coach has also met with other parties who may be interested in our work, including Wiltshire Council, the Community Team for People with Learning Disabilities and the Careers Manager at a local college.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	I can confirm that all Trustees have received guidance issued by the Charity Commission on public benefit and 'have regard' for this 'when exercising any powers or duties to which the guidance is relevant'.

#### **Additional information (optional)**

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	See Me Be CIO does not provide grants.
Policy on social investment including program related investment	Para 1.38	Not applicable.
Contribution made by volunteers	Para 1.38	Not applicable.
Other		

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>During this period we started to raise our profile via social media and attending networking events and reaching out to other parties who may be interested in our work. We created a referral form and have started circulating this on request.</p> <p>Our Job Coach has worked directly with adults with learning disabilities and their parents/carers to facilitate their access to paid employment.</p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<p>Promoting inclusion for the public benefit and preventing people with a disability from being excluded.</p> <p>Action: We were awarded a grant from The National Lottery Community Fund for a Job Coach. The role of our Job Coach is to enable adults with a learning disability to access paid employment by working with them directly and providing tailored support, working with local employers and ensuring all reasonable adjustments are made to ensure the successful recruitment and maintained employment of adults with a learning disability.</p>
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	Not applicable.
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	See Me Be CIO does not have any loans and relies solely on donations and successful grant applications to secure funding at present. Our remaining balance is allocated to the on-going employment of our Job Coach and further grant applications are being made to ensure we can continue to employ our Job Coach and further develop this role.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The current balance is allocated to the on-going employment of our Job Coach.
Amount of reserves held	Para 1.22	At present (January 2024) See Me Be CIO has £8510.72 due to monies raised in 2023.
Reasons for holding zero reserves	Para 1.22	Not applicable.
Details of fund materially in deficit	Para 1.24	See Me Be CIO is not in financial deficit.
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	There are no concerns at present.

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Our principal funding (April 2022 – March 2023) was a donation received from The Capital Group.
Investment policy and objectives including any social investment policy adopted	Para 1.46	Not applicable.
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document ( <a href="#">trust deed</a> , <a href="#">royal charter</a> )	Para 1.25	Constitution
How is the charity constituted? (e.g <a href="#">unincorporated association</a> , CIO)	Para 1.25	Charitable Incorporated Organisation (CIO).
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Lucy Moules founded See Me Be CIO in 2020 and asked Zoe Neale, Laura Richards and Stella Wolstenholme to become Trustees and they accepted. There are four Trustees in total as Stella Wolstenholme is Lucy Moules' mother.

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

## Reference and Administrative details

Charity name	See Me Be CIO
Other name the charity uses	Not applicable.
Registered charity number	1188359
Charity's principal address	3, Malmesbury Road, Lower Stanton St Quintin, Wiltshire, SN14 6BS

**Names of the charity trustees who manage the charity**

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Lucy Moules		March 2020 to present	
2	Zoe Neale		March 2020 to September 2023	
3	Laura Richards		March 2020 to present	
4	Stella Wolstenholme		March 2020 to present	
5	Emma Veal		December 2023 to present	
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**Corporate trustees – names of the directors at the date the report was approved**

Director name		

**Name of trustees holding title to property belonging to the charity**

Trustee name	Dates acted if not for whole year	
Not applicable		

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	Not applicable.
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information

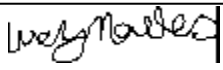
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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Lucy Moules	
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Position (eg Secretary,  
Chair, etc)

Chair	
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Date

30/01/2024
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Month	Income	Out-going	Actual
<b>April</b>			
Account fee		8	10983.36
<b>May</b>			
Amazon Smile	5		10988.36
Account fee		8	10980.36
Localgiving	43.9		11024.26
Enhanced DBS checks		50	10974.26
<b>June</b>			
Morrison's		21	10953.26
Townsend Garden Centre		39.8	10913.46
Insurance event		216	10697.46
Domain renewal		20.7	10676.76
Fundraising Regulator		50	10626.76
Account fee		8	10618.76
Squarespace		85.44	10533.32
Interest	0.91		10534.23
<b>July</b>			
Adfirmo GDPR Consultant		900	9634.23
		0.5	9633.73
Event insurance		216	9417.73
Account fee		8	9409.73
Squarespace		84.96	9324.77
<b>August</b>			
Payroll Manager		69.99	9254.78
Account fee		5	9249.78
Amazon Smile	5.78		9255.56
Towergate Insurance Broker		401.63	8853.93
Payroll 1		167.2	8686.73
<b>September</b>			
Payroll Manager		39.95	8646.78
Payroll Manager		39.95	8606.83
Everything IT		1368	7238.83
Account fee		5	7233.83
HMRC		41.8	7192.03
Interest	2.95		7194.98
Payroll 2		152	7042.98
Capital Group	150		7192.98
Everything IT		1368	5824.98
BASE membership		150	5674.98
<b>October</b>			
HMRC		38	5636.98
Payroll Manager		39.95	5597.03
Payroll Manager		39.95	5557.08
Account fee		5	5552.08
Localgiving		96	5456.08
<b>November</b>			
Payroll 3		167.2	5288.88
HMRC		41.8	5247.08
Payroll Manager		39.95	5207.13

Account fee	5	5202.13
Payroll 4	106.4	5095.73
<b>December</b>		
HMRC	26.6	5069.13
Payroll Manager	39.95	5029.18
Payroll Manager	39.95	4989.23
Account fee	5	4984.23
Interest	2.67	4986.9
<b>January</b>		
HMRC	22.8	4964.1
Reimburse payroll 5	91.2	4872.9
Payroll Manager	39.95	4832.95
Account fee	5	4827.95
Payroll 6	76	4751.95
Amazon Smile	6.01	4757.96
<b>February</b>		
Payroll Manager	39.95	4718.01
HMRC	19	4699.01
Account fee	5	4694.01
<b>March</b>		
Payroll 7	76	4618.01
Payroll Manager	47.94	4570.07
HMRC	19	4551.07
Account fee	5	4546.07
Interest	2.34	4548.41
Total	219.56	6662.51