



Registered Charity Number: 1190818

## **Trustees' Annual Report**

**For the period of the 12th August 2020 to 26th July 2021**

**Including Financial report for the period 12<sup>th</sup> August 2020 to 31<sup>st</sup> March 2021**

Note: Our intention was to hold our AGM in May each year but this year's AGM was postponed until 16<sup>th</sup> August 2021 due to Covid-19.

## **Peer Support Plus**

### **Trustees' Annual Report for the period 12th August 2020 to 26<sup>th</sup> July 2021.**

Registered Charity Number: 1190818

Address: 2 Woodlands Park Grove, Leeds LS28 8LY (our registered address)

Trustees of Peer Support Plus as of 26th July 2021: Lisa Bamford (Chair), David Donaldson, Camilla Freeman, Jane Robertson (Treasurer), Georgina Rushworth (Secretary). All the Trustees were appointed on 12<sup>th</sup> August 2020.

Peer Support Plus has a bank account with Virgin Money.

### **Structure, Governance and Management**

Peer Support Plus CIO is a Charitable Incorporated Organisation (CIO). It is governed according to its Constitution which was accepted and registered with the Charity Commission on the 12<sup>th</sup> August 2020.

Peer Support Plus is entirely run and lead by volunteers, currently all the Trustees have lived experience of mental distress. All five current Trustees were involved in setting up Peer Support Plus as a CIO and undertook training as the need arose.

The Trustees have recently changed from weekly to monthly board meetings with working meetings in between as necessary. Working Parties for specific tasks are formed by trustees on a flexible basis depending on skill set and time available, for example the Finance and Risk Assessment working parties and various parties working on policies and procedures and other documents. Members and Peers are welcome to attend and give their views at Trustee Board meetings but cannot vote on decisions.

Decisions about interpreting objects, policies and procedures are reserved to the Board of Trustees.

New Trustees are being recruited by advertisements on the Doing Good Leeds and Peer Support Plus websites, on the Peer Support Plus Facebook page and by word of mouth. The recruitment process is through informal discussion with the current Trustees. New Trustees will be provided with a copy of the Governing Document (Constitution) and the most recent Trustee Meeting Minutes, Action Points List, Trustees' Annual Report & Financial Statements. As volunteers they are covered by Peer Support Plus's Volunteer Policy and induction process.

We hope the new Trustees will have the knowledge and expertise to take on some of the work/tasks currently shared by the existing Trustees to share/reduce their

workload as all Trustees are volunteer facilitators too. We hope that they may also have their own new suggestions for improving the way Peer Support Plus is managed.

### **Objectives and Activities**

The purpose of the charity as set out in the Constitution is “to relieve sickness and preserve health of persons suffering from mental illness of any description or in need of rehabilitation and support as a result of such illness, in the Leeds Metropolitan District by the provision of:

- Peer to Peer support.
- Educational workshops and courses on managing mental health illness and rehabilitation.
- Advice and guidance on living with mental health illness.”

The main activity undertaken by Peer Support Plus to further these charitable purposes for public benefit is the provision of Peer Support groups.

The Trustees have complied with the duty to have due regard to guidance on public benefit published by The Charity Commission (PB1, PB2, PB3).

### **Executive Summary**

- Kept the open-ended support group running on Zoom throughout the pandemic when the previous hosts had closed it on 31<sup>st</sup> March 2020.
- We established the charity Peer Support Plus CIO on the 12<sup>th</sup> August 2020, registering it with the Charity Commission; and HMRC for gift aid.
- We secured funding to enable us to double our capacity to serve beneficiaries and to reach out to people who were not previously served.
- We established a public presence as a reputable provider of mental health support in Leeds.
- We have opened a second support group and have attracted sufficient new Peers to make it viable.
- We are financially viable until at least March 2023.

## **Activities, Achievements & Performance**

### **Peer to Peer support.**

The Trustees set up Peer Support Plus with the aim of providing on-going Peer Support groups for adults in Leeds who are experiencing difficulties with their mental health; to promote their well-being and quality of life by providing the opportunity for Peers to learn from each other by sharing their lived experience of living with and managing their mental health.

### **Educational workshops and courses on managing mental health illness and rehabilitation.**

Peer Support Plus's 5-year vision (see Appendix 2) includes providing free workshops and courses without replicating what is available elsewhere. We hope by doing this we will be able to widen the range of tools and strategies to help Peers with specific mental health issues and increase the number of Peers able to access peer support.

### **Advice and guidance on living with mental health illness.**

Although giving advice is actively discouraged in our Peer Support Groups, Peers who take time to talk about an issue are able to take inspiration from the other Peers sharing their lived experience on ways they have dealt with similar feelings and experiences in the past. Other advice and guidance are provided through signposting to groups, workshops, training, resources and events that may be beneficial for our Peers.

### **Why Open-ended Peer Support?**

The Trustees believe strongly that the ongoing nature of open-ended peer support provides continuity and stability to help Peers tackle deep seated issues, embark on major life or behavioural changes, or maintain their present level of 'recovery'.

Following the closure of open-ended peer support groups by Leeds Mind at the end of March 2020 the first goal of Peer Support Plus was to continue meet as an open-ended peer support group. This was because no other organisation in Leeds was providing this model of peer support in an open-ended group that was not restricted in terms of age, race, gender or sexuality and we believe our diversity of experiences is a strength. Our website, [www.peersupportplus.org](http://www.peersupportplus.org) gives further information about our history, values and model of peer support. Our 12-month plan for this year can be seen in Appendix 1 and a table showing our progress towards those goal can be seen in Appendix 3.

## **What we have achieved.**

The Trustees kept the Peer Support Group going by setting up as a Community Association, obtaining a Side-by-Side grant from Mind and finding a venue, Lovell Park Hub, where the group could meet weekly. However, the pandemic lockdown coincided with the start of the group, so the Trustees switched to providing a weekly afternoon Zoom based Peer Support group in April 2020. Nine members of the group from Mind attended, two decided after trying Zoom that it was not right for them so are waiting to join us when we can meet in-person again along with another member who preferred not to try Zoom at all.

The Zoom group continued after the CIO was set up, providing support to Peers throughout the pandemic. Peers have given us the following feedback:

*"I am not alone".*

*"I can't share with the people closest to me without upsetting them, but I can talk to people who aren't involved in my life."*

*"Some times I don't know what I think and feel about things until I talk about them."*

*"I use the group to catch issues before they become too big and to avoid worrying my friends. The support group is able to contain my feelings and not over react, and I get validation by checking out things with the group."*

*"I can sound out what I'm feeling about things because I sometimes don't know. This helps me understand myself better."*

The Trustees next goal was to ensure that Peer Support Plus would be sustainable and viewed as a legitimate organisation with plenty of opportunities to apply for funding and resources that would allow Peer Support Plus to expand and support more adults in Leeds. To that end the Trustees then worked towards becoming a Registered Charity which we achieved on the 12<sup>th</sup> of August 2020.

As part of establishing an online presence in Leeds, Trustee David Donaldson, with assistance from Andrew Jones of GoWeb Wakefield, created a website for Peer Support Plus which went live in January 2021 when a Facebook page was also established. Peer Support Plus was also registered on [MindWell](#), the mental health website that adults in Leeds are signposted to in order to find support.

All Peers were invited to submit ideas and designs for Peer Support Plus's logo and the idea of having three owls was the most popular idea because of the owls on Leeds City Council's coat of arms. The Trustees advertised for help creating the design and the submission by Scarlett Shearwood of Arts and Minds Network was unanimously chosen.

For Peer Support Plus's official launch date, 21<sup>st</sup> April 2021, the Trustees emailed out publicity to organisations in the mental health sector in Leeds. Together with the online publicity this led to 12 enquiries about joining a support group. By 26<sup>th</sup> July

2021, 6 had attended an Introduction to Group Work workshop and had joined one of our Peer Support Groups.

To increase their competency the Trustees undertook various training offered by WYCAS, Voluntary Action Leeds, 100% Digital Leeds, Tech Ladder and the Small Charity Coalition. Examples of courses attended include learning how to use a work book for the accounts, Safe-guarding, risk management, how to manage volunteers, asset-based community development and digital champion training. One Trustee, Jane Richardson, also undertook a course on facilitation to increase the number of facilitators to five.

The Trustees made a successful grant application to the Harrogate and West Yorkshire Health Care Partnership Targeted prevention grant funding for £5,000 to expand Peer Support Plus. This enabled us open a second Zoom based support group for 12 months, train a new facilitator and purchase 4 tablets with 4G internet connections for loan to digitally disadvantaged Peers.

It was decided to run this second group permanently on Zoom in the evening to reach out to those who, for reasons such as mobility, travel, employment, conflicting caring commitments and so on, would otherwise be unable to attend a Peer Support Group.

Once we had new members waiting to join the evening group we asked, and received permission, from existing Wednesday group members to merge the groups on Tuesday evenings until the Wednesday group could meet face to face again. The first joint Zoom session meeting was on the 15<sup>th</sup> June 2021.

Potential Peers wishing to join a support group first need to attend an Introduction to Group Work (IGW) workshop to familiarise themselves with how Support Groups function and help them decide if they wish to join. The Trustees wrote a workshop plan for the IGW. The first IGW was run on 8<sup>th</sup> June 2021 and a second was run on 14<sup>th</sup> July 2021.

Preparations have been made for the Wednesday Support Group resume meeting face-to-face with the planned start date of Wednesday 28<sup>th</sup> of July 2021. Lovell Park Hub has agreed to donate a meeting space for the group on Wednesday afternoons.

Peer Support Plus has no paid staff. It is entirely run by volunteers, primarily the five Trustees who are also the facilitators for the Peer Support groups and have over thirty years' experience as facilitators between them. Some other Peers have provided expertise and assistance when able. Private individuals and organisations have also donated assistance, for example, access to a Zoom Pro account suitable for our needs was donated by one of our volunteers.

Our Five-Year Vision is to be predominantly Peer led and delivered. We hope to recruit and train more volunteers from our Peers and the wider community to keep Peer Support Plus viable and to support expansion.

## Financial Review

This report covers the period from 12 August 2020 when Peer Support Plus was Registered with the Charity Commission as a CIO until 31 March 2021.

<b>Review of the charity's financial position at the end of the period</b>	At 31 March 2021 Peer Support Plus's only tangible asset was £161.38 Cash at Bank. [A £5,000 Grant to double our capacity was awarded by the NHS in December 2020 but was not received until April 2021.]
<b>Statement explaining the policy for holding reserves stating why they are held</b>	By 31 March 2023 we intend to build sufficient reserves to fund unavoidable expenditure for six months, in case of a short run funding gap.
<b>Amount of reserves held</b>	None at 31 March 2021.
<b>Reasons for holding zero reserves</b>	Peer Support Plus was Registered as a CIO on 12 August 2020 at the height of the Global Pandemic when there was scant opportunity for fundraising.
<b>Details of fund materially in deficit</b>	None.
<b>Explanation of any uncertainties about the charity continuing as a going concern</b>	None. Peer Support Plus made a strong beginning with a start-up Grant and very low outgoings. In April 2021 it received sufficient Grant funding to operate two Support Groups until March 2023.
<b>The charity's principal sources of funds (including any fundraising)</b>	Peer Support Plus presently relies on small Grants and Donations. The Trustees will supplement these sources with small scale Fundraising activity as and when needed.
<b>Investment policy and objectives including any social investment policy adopted</b>	None necessary. At the present scale of operations, cash and reserves are held in Peer Support Plus's Bank Current Account.
<b>A description of the principal risks facing the charity</b>	<ol style="list-style-type: none"> <li>1. Potential for failure to raise sufficient funds to continue offering services after 31 March 2023.</li> <li>2. Potential for failure to attract sufficient Volunteers to continue operating services.</li> </ol>
<b>Other</b>	Peer Support Plus is currently operated entirely by unpaid Volunteers. It has no Capital assets and is administered almost entirely online.

## Declarations

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

Signed on behalf of the charity's trustees:

<b>Signature</b>	<a href="#">Lisa M Bamford</a>
<b>Full name</b>	Lisa Michelle Bamford
<b>Position</b>	Chair of Trustees
<b>Date</b>	10/08/2021



## **Appendix 1**

### **12 Month Plan for Peer Support Plus: Vision at 31 March 2021**

- Continued to simplify and add lightness
- Smooth day to day operation – not requiring panic intervention of requiring major development to run smoothly
- IGW (Introduction to Group Work) Workshop in place
- Find and train more accredited Volunteer Facilitators
- Well established open-ended Peer Support Group meeting in person at Lovell Park Mental health hub – with membership increased so that typically 10 Peers are present in the room and four sharings are achieved. (Satisfying an emotional need to feel a sense of being 'rooted' in and having a 'home' at Leeds.)
- A second open-ended Peer Support Group with typically 10 Peers in the room and four sharings has been, or is ready to be, launched
- Registered CIO status achieved
- Programme of Trustees Meetings established
- Delivery Team and Programme of activities established
- HM Revenue registration achieved (for Gift Aid)
- Just Giving (or similar) fund raising activity and donations collection system live
- All necessary Policies and Processes established and published on website (Transparency)
- Charity Membership administration system established
- Online Peer records and Delivery Team activity administration system established
- Bank account and financial accounting and reporting system established
- Performance measurement system with automatic reporting established

- A 'presence' in Leeds established e.g.
  - Peer Support Plus website live (including Gift Aided Donations button)
  - Listed on MindWell <https://www.mindwell-leeds.org.uk/>
  - Networking with other organisations supporting mental health in Leeds
  - Other organisations starting to signpost potential Peers to us
- Break even 2020/21.
- Grants or expected flow of Donations / Fund Raising Events in place sufficient to fund our 12 Month Plan for 2021/22
- First CIO AGM arranged for early May 2021
- Able to graduate to monthly Trustees' meetings by 1 April 2021

## Appendix 2

### Vision for Peer Support Plus in 5 Years (at 31 March 2025)

- Nurture our Peer Support model and satisfy our Constitution
- Accredited Facilitator Training established In-house (to put our slant on it and save external costs)
- More free face to face open-ended Peer Support Groups in Leeds
- Some free on-line Peer Support Groups, to aid accessibility (overcoming timing / location / mobility constraints) in Leeds
- Some free Peer Support Groups facilitated in Partnership with other organisations
- Some free Workshops and Courses (but not replicating what is available elsewhere)
- Facilitating free Peer Support Groups at all three Mental health hubs – Lovell Park, Stocks Hill and Vale Circles (or similar venues) with the aim of achieving accessible coverage across Leeds Metropolitan Area
- Low cost – where possible avoiding venue costs, asset purchases, employing people and entering long-term financial commitments, so we are not 'caught out' by financial crises
- Light on our feet – e.g., ready to respond to changes in levels of demand with 'Plan B' in place ready to change venues or funding sources if necessary
- Financial capacity to afford 'good quality coffee' at mid-session refreshments
- Predominantly Volunteer led and delivered, but not ruling out the possibility of obtaining funding for a paid Administrator and some paid Facilitators
- Peer Support Groups tailored to those who for cultural reasons, or because they share a particular Peer experience, would find it hard to discuss particular issues in a general mixed Peer Support Group
- Selling Online Peer Support Groups, Workshops and Courses to adults outside Leeds Metropolitan Area to help fund free activities here
- Selling to organisations anywhere, at commercial market rates, to fund our free activities in the Leeds Metropolitan Area:
  - Accredited Facilitator training

- Online Peer Support Groups, Workshops and Courses – to other organisations on a commercial basis
- Our 'franchise' – sharing our knowledge and expertise, and licencing for a modest fee use of our methods, including our intellectual property such as internal policies, processes and administrative systems
- Copies of the copyright and public domain Course and Workshop materials we create, develop consolidate or maintain – to be sold through a shop on our website. (We will offer public domain materials using the same 'well presented, convenient, accessible source' business model as those who sell public domain and out-of-copyright sheet-music or books.)

### Appendix 3,

**Table showing progress towards 12 Month Plan for Peer Support Plus**

Goal/Target/Aim	Progress
Continued to simplify and add lightness	Ongoing
Smooth day to day operation – not requiring panic intervention or requiring major development to run smoothly.	Achieved
IGW (Introduction to Group Work) Workshop in place	Achieved
Well established open-ended Peer Support Group meeting in person at Lovell Park Mental Health Hub - with membership increased so that typically 10 Peers are present in the room and four sharings are achieved. (Satisfying an emotional need to feel a sense of being 'rooted' and having a home at Leeds)	Group established on Zoom instead due to Covid-19
A second open-ended Peer Support Group with typically 10 Peers in the room and four sharings has been, or is ready to be, launched	Second group launched in July 2021
Find and train more accredited Volunteer Facilitators	1 Trained and ongoing
Registered CIO status achieved	Achieved
Programme of Trustees Meetings established	Achieved
Delivery Team and Programme of activities established	Achieved
HM Revenue registration achieved (for Gift Aid)	Achieved
Just Giving (or similar) fund raising activity and donations collection system live	Achieved
All necessary Policies and Processes established and published on website (Transparency)	Largely Achieved
Charity Membership administration system established	Ongoing
Online Peer records and Delivery Team activity administration system established	Ongoing
Bank account and financial accounting and reporting system established	Achieved
Performance measurement system with automatic reporting established	Data collection ongoing

## Peer Support Plus Trustees' Annual Report 26<sup>th</sup> July 2021

<p>A 'presence' in Leeds established e.g.</p> <p>Peer Support Plus website live (including Gift Aided Donations button)</p> <p>Listed on MindWell <a href="https://www.mindwell-leeds.org.uk/">https://www.mindwell-leeds.org.uk/</a></p> <p>Networking with other organisations supporting Mental Health in Leeds</p> <p>Other organisations starting to signpost potential Peers to us</p>	<p>Achieved</p> <p>Achieved</p> <p>Achieved and ongoing</p> <p>Achieved and ongoing</p>
Break even 2020/21.	Achieved
Grants or expected flow of Donations / Fund Raising Events in place sufficient to fund 2021/22 Plan	Achieved
First CIO AGM arranged for early May	Postponed until August 2021 due to Covid-19
Able to graduate to monthly Trustees' meetings by 1 <sup>st</sup> April 2021	Achieved July 2021

END

**Receipts and Payments Account 12/08/2020 to 31/03/2021 \***

	<u>£ Total</u>	Notes
<b>Receipts</b>		
Donations		
Fundraising		
Grant		
	<u>0.00</u>	
<b>Payments</b>		
Bank Charges	-80.00	Virgin Money - Redress for undue delay in opening Current Account
Applications for Grants		
Membership of other organisations		
Insurance	201.11	Zurich - Annual Premium 2021/22
Brand & Publicity		
Postage		
Data & Telephone		
Stationery & Consumables		
Brand & Publicity		
Recruitment		
Training		
Volunteer Expenses		
Group Work Refreshments		
Tablets for Peers		
Administration Hardware & Software		
Webhosting & Cloud Services	27.53	LCN - Annual Domain Registration Fee
	<u>148.64</u>	
<b>Net Receipts / Paymants</b>	-148.64	
Transfer		
Balance brought Forward	310.00	MIND - Side by Side start-up Grant
<b>Balance carried Forward</b>	<u>161.36</u>	

**\* Note** Peer Support Plus was Constituted as a Community Association from 19/03/20 until 11/08/22.  
On 12/08/2021 it was Registered by the Charity Commission, Constituted as a CIO with voting Members.  
2021/22 and future Finacial Years will each be accounted for 12 months, from 01/04 to 31/03.