



Registered Charity Number: 1190818

# Trustees' Annual Report

For the period 1<sup>st</sup> April 2022 to 31<sup>st</sup> March 2023

Our Financial Report is for the same period.

# Peer Support Plus CIO

## Trustees' Annual Report – 1<sup>st</sup> April 2022 to 31<sup>st</sup> March 2023

Registered Charity Number: 1190818

Registered Address: 1 Elmete Close, Leeds LS8 2LD

Trustees of Peer Support Plus CIO as of 31<sup>st</sup> March 2023:

Lisa Bamford (Chair), Gill Lundgren (Secretary), David Donaldson (Treasurer), Camilla Freeman, Jane Richardson, and Jamie Tyson. [Four of the six Trustees were formally elected at our first AGM on 16<sup>th</sup> August 2021. The current Secretary was co-opted at the Trustee Board Meeting held on 25<sup>th</sup> January 2023. The previous secretary, Julie Metcalfe, stood down on 24<sup>th</sup> January 2023].

Peer Support Plus CIO operates a Charity, Clubs and Society bank current account with Virgin Money UK PLC 2022.

### Structure, Governance and Management

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

Peer Support Plus is led and operated entirely by volunteers. Currently all but one of our Trustees has lived experience of mental distress. Four of our current six Trustees were involved in establishing the charity.

Trustees hold 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, working parties develop and review policies and procedures. Members and Peers are welcome to attend Trustee Board meetings and express their views but cannot vote.

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

New Trustees are recruited by advertising 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 are provided with a copy of our Governing Document (Constitution) and the most recent Trustee Meeting Minutes, Trustees' Annual Report & Financial Statements. As volunteers they are covered by Peer Support

Plus's Volunteer Policy and induction process. Trustees undertake training appropriate to their roles and responsibilities. All Trustees have online access to all our policies and process documentation.

We recruit new Trustees with knowledge and expertise to take on some of the work/tasks currently shared by the existing Trustees to share/reduce their workload, as four of our current Trustees are also volunteer facilitators. We encourage new Trustees to put forward their own 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 their duty to have due regard to guidance on public benefit published by The Charity Commission (PB1, PB2, PB3).

## **Executive Summary**

- Established the charity Peer Support Plus CIO on 12<sup>th</sup> August 2020, by registering it with the Charity Commission. We held our first AGM on 16<sup>th</sup> August 2021.
- Received NHS funding in April 2021 enabling us to double our capacity to serve beneficiaries and reach out to people who were not previously served. This funding enabled us to maintain two groups throughout 2022/23.
- In September 2022 we obtained a microgrant from the Leeds Community Foundation Leeds Fund to recruit and train additional facilitators by September 2023. By March 2023 we had recruited three new facilitators and two new administrators, which helped release additional facilitator and mentoring capacity.

- Continued to establish a public presence as a reputable provider of mental health support in Leeds. We do this through networking and attending community events. We also distributed notices and flyers in community settings.
- Continued to run two support groups, one in person and one on Zoom, and have attracted sufficient new Peers to make both viable.
- Financially viable until at least March 2024 and have maintained a small financial reserve equal to 12 months' unavoidable operating costs.

## **Activities, Achievements & Performance**

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

The Trustees set up Peer Support Plus with the aim of providing ongoing Peer Support groups for adults in Leeds who are experiencing difficulties with their mental health; to promote their wellbeing 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. By doing this we will be able to widen the range of tools and strategies available 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.**

Giving advice is actively discouraged in our Peer Support Groups. Peers who take time to talk about an issue can 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 other groups, workshops, training, resources, and events that might benefit 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 meeting as an open-ended peer support group. 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.

Further information about our history, values and model of peer support is published on our website, [www.peersupportplus.org](http://www.peersupportplus.org). Our 12-month plan for this year can be seen at Appendix 1 and our 5-year plan can be seen at Appendix 2.

## **What we have achieved**

The Trustees have not only continued to run an in-person group on Wednesday afternoons at the Lovell Park Hub, but also maintained the second Zoom based Peer Support group on Tuesday evenings. We continued to offer four digital tablets with 4G internet connections for loan to digitally disadvantaged Peers.

Peers have given us the following feedback:

*“I struggle to confide in my family and friends. This group is the only place I feel comfortable talking about how I really feel.”*

*“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 overreact, and I get validation by checking out things with the group.”*

*“Have a rant in a safe Group where nobody is involved or likely to take it personally.”*

*“I can check things out with the Group instead of burdening my friends.”*

*“Giving voice to my feelings about things. I sometimes don’t know what I am thinking and feeling until I hear myself try and express them to others.”*

*“A place where I can speak freely without feeling judged.”*

*“Talking with people I trust.”*

*“Every meeting is new and you get something new out of it.”*

*“Collaborative happiness” and “Sneaking up on happiness”.*

*“A caring & loving environment to talk through difficulties in life. No matter just listening to others or sharing my own feelings, I feel safe & I belong.”*

*“Zoom setting is convenient & cosy. The smiling faces have connected us almost the same way as face-to-face setting.”*

*“I feel safe to be me, don’t have to have any front to protect myself. Feels good to have a group where I feel safe and accepted. Every time we meet, I*

*have some new insight, find something helpful in relation to my issues, from others in the group.”*

*“Helps me so much to have this regular space in managing my mental health. It’s become an important time in my week, a reliable time where I connect with myself, and especially with others, as I struggle with connecting with people in my day-to-day life.”*

*“I am not alone”* [Often stated after the first Support Group meeting attended.]

The Trustees have continued to ensure that Peer Support Plus is sustainable and viewed as a legitimate, trustworthy, and effective organisation with opportunities to raise funds and attract volunteers. This will enable Peer Support Plus to expand and support more adults in Leeds.

We have continued to develop our online presence through our website and Facebook page.

Peer Support Plus is registered on MindWell, the mental health website, to which adults in Leeds are signposted in order to find support for mental health.

Here are some examples of our outreach activities:

We started attending community events, for which we designed and purchased a pop-up banner. We continue to distribute posters, flyers, and business cards, to provide us with a presence in health and community settings.

We attended Thrive (time-limited mental health peer support group) run by Live Well Leeds and offered participants the opportunity to join our peer support group.

We contributed to a study by the Royal Free London NHS Foundation Trust about the NHS Transformation Project for Older Adults. Their brief was to include peer support as one means of providing mental health support for older people. We contributed our lived experience in the field. Peer Support Plus CIO became a case study in the final report.

We co-produced a film by Oakwood Film Academy called “The Man at the Clock”, which received its premiere at the end of March 2023. Later this year we plan to show a version in community settings to begin conversations about managing our mental health. See: <https://www.imdb.com/title/tt20603956/>.

In late 2022 we started advertising for and successfully recruited three additional Volunteer Trainee Facilitators. In January 2023 we welcomed two new volunteers for administrative roles. One of these volunteers was also co-opted as Secretary Trustee. We hope to recruit additional Trustees and Facilitators in 2023/24.

During 2022/23 14 people approached us and 13 became Peers.

We continued to operate our Zoom Support Group weekly on Tuesday evenings 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.

Leeds City Council's Lovell Park Hub kindly continued to donate a meeting space for the group on Wednesday afternoons. We have met there weekly since November 2021.

Potential Peers wishing to join a Peer Support Group first attend an Introduction to Group Work (IGW) workshop to familiarise themselves with how our Peer Support Groups work and help them decide if they wish to join. The Trustees wrote a new workshop plan for our IGW and the first was run on 8<sup>th</sup> June 2021. Further IGWs were held on 3<sup>rd</sup> August 2022, 5<sup>th</sup> December 2022, 12<sup>th</sup> January 2023, 1<sup>st</sup> February 2023 and 29<sup>th</sup> March 2023.

Peer Support Plus has no paid staff. It is operated entirely by volunteers. Four of our Trustees are also the facilitators of Peer Support groups. Between them they have over thirty years' experience as Peer Support Group facilitators.

Private individuals and organisations have also donated assistance. 34sp, our new website host, are giving us free hosting, email, and SSL.

Our Five-Year Vision is to remain predominantly Peer led and delivered. We hope to recruit and train more volunteer facilitators and Trustees from both our Peers and the wider community to help keep Peer Support Plus fresh and viable, and to support expansion.

## Financial Review

This report covers the period from 1<sup>st</sup> April 2022 until 31<sup>st</sup> March 2023.

<b>Review of the charity's financial position at the end of the period</b>	At 31 March 2023 Peer Support Plus's only tangible asset was £5135.62 in the bank.
<b>Statement explaining the policy for holding reserves and stating why they are held</b>	At 31 March 2023 we had a Reserve sufficient to fund unavoidable expenditure for twelve months, in case of a short run funding gap.
<b>Amount of reserves held</b>	£1600 at 31 March 2023.
<b>Reasons for holding 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. We relied mainly on donations and small grants which do not arrive as a predictable income stream.
<b>Details of fund materially in deficit</b>	Not in deficit.
<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. We now have raised sufficient funds to operate them until March 2024.
<b>The charity's principal sources of funds (including any fundraising)</b>	Until 31 March 2023 Peer Support Plus has relied on small Grants and Donations. The Trustees will begin to supplement these sources with public fundraising activity during 2023/24
<b>Investment policy and objectives including any social investment policy adopted</b>	None necessary. At the present scale of operations, all of our available funds and reserves are held in Peer Support Plus's Bank Current Account at Virgin Money which pays trivial interest on balances.
<b>A description of the principal risks facing the charity</b>	<ol style="list-style-type: none"> <li>1. Potential for failure to attract sufficient Volunteers to continue operating services.</li> <li>2. Potential for failure to raise sufficient funds to continue offering services after 31 March 2024.</li> </ol>
<b>Other</b>	Peer Support Plus is currently operated entirely by unpaid Volunteers. It has no assets and is administered almost entirely online.



## Declaration

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

Signed on behalf of the charity's trustees

**Signature**

*Lisa M Bamford*

**Full name**

Lisa Michelle Bamford

**Position**

Chair

**Date**

26<sup>th</sup> April 2023

## Appendix 1

### 12 Month Plan 2023-24 for Peer Support Plus – by 31 March 2024

- Continue to simplify and add lightness.
- Continue to develop smooth day to day operation – not requiring urgent intervention or major systems development to continue running effectively.
- Expand our current team of Accredited Volunteer Facilitators. Train and retain new and existing facilitators.
- Recruit additional Trustees.
- Maintain the presence of two administration volunteers and develop their skills and knowledge.
- Well-established open-ended Peer Support Group meeting weekly in person at Leeds City Council's Lovell Park Mental Health Hub – with membership increased so that typically 10 Peers are in the room and four rounds of sharing are achieved. (This venue satisfies Peers' emotional needs to feel a sense of being 'rooted' in or having a physical 'home' at Leeds).
- Well-established open-ended Peer Support Group meeting weekly by Zoom, typically having 10 Peers in the room and four rounds of sharing achieved.
- Delivery Team and programme of activities established, including appointment of individual Mentors and periodic Group Supervision for all volunteers organised by the Delivery Team Lead.
- All necessary Policies and Processes established and published on website (Transparency).
- Charity Membership increased, and recruitment and administration processes established.
- Online Peer records and Delivery Team activity administration system established and continues to be developed.
- Performance measurement system (WEMWBS) with automatic reporting established and continues to be developed.
- Accredited Facilitator Training sourced externally with practical training established in-house to put our slant on it by 31<sup>st</sup> March 2024.

- A 'presence' in Leeds established e.g.
  - Networking with other organisations supporting mental health in Leeds.
  - Other organisations signposting potential Peers to us.
- Just Giving fundraising activity support system is live. We will aim to exploit it to the maximum.
- Grants or expected flow of Donations / Fund Raising Events in place by 31<sup>st</sup> March 2024 sufficient to fund our 12 Month Plan for 2024/25.
- Maintain our Financial Reserve at a level sufficient to fund 12 months activity.
- Fourth AGM arranged for May 2024.

## **Appendix 2**

### **5 Year Vision for Peer Support Plus as at 31 March 2028**

- Nurture our Peer Support model and satisfy our Constitution.
- Face to face open-ended Peer Support Groups established at all three mental Health Hubs in Leeds – Lovell Park, Stocks Hill, and Vale Circles (or similar venues) with the aim of achieving accessible coverage across Leeds Metropolitan Area.
- Two free online Peer Support Groups, to aid accessibility (overcoming timing / location / mobility constraints) in Leeds.
- Some free Peer Support Groups facilitated in Partnership with other organisations, to extend our demographic reach.
- In addition to our IGW, some focussed mental health Workshops and Courses offered free (not replicating what is available elsewhere in Leeds).
- Low cost – i.e., 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 – i.e., ready to respond to changes in levels of demand with ‘Plan B’ in place ready to change venues or funding sources if necessary.
- Continuing financial and volunteer capacity to afford to do things effectively without cutting corners e.g., ‘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 us offer such activities free at Leeds.
- Selling to organisations anywhere, at commercial market rates, to fund our free activities in the Leeds Metropolitan Area e.g.
  - 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 the limited rights to use 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.)

**Peer Support Plus CIO** Registered Charity Number 1190818

**Receipts and Payments Account 01/04/2022 to 31/03/2023**

	<b><u>£ Total</u></b>	<b>Notes</b>
<b>Receipts</b>		
Donations	30.00	
Fundraising		
Grant	1,500.00	Leeds Fund Micro Grant
Interest	99.51	
Gift Aid		
Cashback	31.54	
Banking Error Corrections	93.33	Under Direct Debit Guarantee
	<b><u>1,754.38</u></b>	
<b>Payments</b>		
Remuneration		No Employees
Recruitment & DBS Checks	84.97	Re Volunteers
Training		
Volunteer Expenses		
Insurance	201.11	Renewal due 1 April 2023
Bank Charges		
Banking Errors	139.23	Recoverable under DD Guarantee
Zoom Pro	143.88	Renewal due 7 June 2023
Venues	25.00	
Support Group Refreshments		Claim outstanding
Admin Hardware and Software		Donated
Web Hosting and Cloud Services	34.78	
Digital Tablets for Peers		
Data & Telephone	169.68	
Stationery & Consumables		Donated
Postage		
Brand & Public Relations		
Advertising & Publicity		
Membership of other organisations		
Grant Application Costs		
	<b><u>798.65</u></b>	
<b>Receipts minus Payments</b>	<b>955.73</b>	
Transfer	0.00	
Balance Brought Forward	4,179.89	
<b>Balance Carried Forward</b>	<b><u>5,135.62</u></b>	
<b>Balance Carried Forward comprises</b>		
Reserve	1,600.00	12 months operating costs
Restricted	1,519.65	NHS W Y Health Care Partnership
	1,406.83	Leeds Fund Micro Grant
Unrestricted	609.14	
	<b><u>5,135.62</u></b>	

**End**