

**COMPANY REGISTRATION NUMBER: 06946785**

**CHARITY REGISTRATION NUMBER: 1133457**

**Suffolk User Forum  
Company Limited by Guarantee  
Unaudited financial statements  
31 March 2022**

**Suffolk User Forum**  
**Company Limited by Guarantee**  
**Financial statements**  
**Year ended 31 March 2022**

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# **Suffolk User Forum**

## **Company Limited by Guarantee**

### **Trustees' annual report (incorporating the directors' report)**

#### **Year ended 31 March 2022**

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The trustees, who are also the directors for the purposes of company law, present their report and the unaudited financial statements of the charity for the year ended 31 March 2022.

The financial statements have been prepared in accordance with the accounting policies set out in notes to the accounts and comply with the charity's governing document, the Charities Act 2011 and Companies Act 2006 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland published in October 2019.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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##### Chair's report

This reporting year has brought us a mix of challenges, successes, and rewards. It has been our third and final year of a three-year partnership and funding agreement with Suffolk County Council and the final year of advocacy funding, as a partner within Total Voice Suffolk. The challenge, as it is for many small charities, has been in securing long term sustainable funding to ensure ongoing service delivery and support to our beneficiaries, through specific project work, alongside promoting the voices of individual people living with mental ill health, and the shared interests of mental health service users.

As the reporting year closes, we are pleased to report that our core funding has been confirmed for a further year until March 2023. We have also been successful in our advocacy bid, as a partner in the new Suffolk Advocacy Service. Working together with POhWER and two other Suffolk charities (Ace Anglia, and Suffolk Family Carers) we will provide advocacy for a further three years.

In February 2022 we also received a generous donation from Ipswich Cemeteries Department through their Metal Recycling Fund. This donation was made in recognition of the personalised support given to service users who have valued a more individual approach to help them to manage their grief.

However, we have not been able to secure funding for our community engagement work with service users, for suicide prevention or for our business support post. We have been unable to extend most staff contracts beyond March 2022. We wish to express our thanks to the staff who have left us this year, for their hard work, commitment, and contribution to SUF, wishing them well in their future careers. We also wish to recognise the hard work of our existing team for the additional work they have undertaken to continue to meet our beneficiaries' needs and our charitable objectives and to support our developing project work.

In this report you can read about the positive impact of our work. Our peer advocacy has supported people at a critical time in their lives, enabling them to understand and exercise their rights, speaking up for their needs, choices and wishes. Our Healthy Together Project, which delivers peer support to people living with severe mental illness (SMI), has made a significant difference to individual lives, helping people to reach their healthcare and wellbeing goals and addressing long standing health inequalities. We are delighted to report that our Healthy Together Project has been funded for 2022/23. This additional funding will enable us to support more service users living with SMI in primary care.

We have published six 'Making Our Voice Count' feedback reports, sharing your experiences of mental health services and support. These publications form a vital part of raising awareness of the strengths and weaknesses of local services. It is only by understanding service user experiences that improvements can be made by providers. The reports also support adult social care and NHS commissioners to discharge their statutory duty to listen to user voices. Our reports are only possible because of the feedback we receive from you, as mental health service users and family/parent carers. We would like to thank you for trusting us with your very personal lived experiences, for your time and involvement. Your feedback has been invaluable and will help to make a difference.

Finally, we would like to recognise the commitment and contribution made by our SUF trustees. They are unpaid volunteers who take responsibility for ensuring that SUF carries out its functions in the interests of our beneficiaries, complies with our governing document and the law, ensuring good governance and accountability. Thank you SUF Trustees; without your oversight, support, and unwavering commitment we would not be the organisation we are.

# **Suffolk User Forum**

## **Company Limited by Guarantee**

### **Trustees' annual report (incorporating the directors' report) *(continued)***

#### **Year ended 31 March 2022**

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As we enter the new year, we are excited by the opportunities ahead of us, and know we can continue to make a valuable contribution to many people's lives. We feel proud of the unwavering positive support and feedback we have received. We remain committed to being the authentic voice of people living with mental ill health.

With best wishes, Guenever and Jayne.

Guenever Pachent, SUF Chair

Jayne Stevens, CEO

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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##### Reference and administrative details

<b>Registered charity name</b>	Suffolk User Forum
<b>Charity registration number</b>	1133457
<b>Company registration number</b>	06946785
<b>Principal office and registered office</b>	3 Grange Business Centre Kesgrave Ipswich IP5 2BY

##### The trustees

The trustees who served during the year and at the date of approval were as follows:

G Pachent (Chair)  
M Blowers  
J Everett (Appointed 12/07/2022)  
A Good (Appointed 02/03/2022)  
R Nesbitt  
B Parrott  
J Stern  
B Turner (Appointed 02/03/2022)  
M White (Appointed 28/04/2021)  
P Gaffney (Resigned 14/09/2021)  
B Griggs (Resigned 21/03/2022)  
C Maher (Resigned 26/06/2021)  
M Wright (Resigned 20/07/2021)

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

Year ended 31 March 2022

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<b>Chief executive officer</b>	J Stevens
<b>Solicitors</b>	Bates Wells and Braithwaite Solicitors 29 Lower Brook Street Ipswich IP4 1AQ
<b>Bankers</b>	The Co-operative Bank 9-11 Queen Street Ipswich IP1 1SW  Ipswich Building Society Unit 22 Sailmakers Shopping Centre Ipswich IP1 3BB  Nationwide Building Society 48 Tavern Street Ipswich IP1 3DL
<b>Company secretary</b>	R Nesbitt
<b>Independent examiner</b>	L Thurston FCCA Lovewell Blake LLP Chartered accountants First Floor Suite 2 Hillside Business Park Bury St Edmunds IP32 7EA

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

Year ended 31 March 2022

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#### Objectives and activities

Suffolk User Forum, also referred to as SUF (a term used throughout these accounts) voices the views of mental health service users and their family/parent carers in the East and West of Suffolk. SUF is an independent, user-led mental health charity, also known as a Disabled Persons Organisation (DPO). Everyone involved in the charity has lived experience of mental health as a service user, family carer or worker.

SUF delivers engagement, involvement, coproduction, peer support and inpatient mental health advocacy services. SUF gives mental health service users a powerful and unified voice for their experiences of care and support, promoting individuals' rights, options and choices for care and support for both physical and mental health.

The charity works with service providers and commissioners to ensure that the voices of lived experience are central to improving emotional wellbeing and mental health services in East and West Suffolk. This is achieved through the charity's engagement, peer support and advocacy roles, which alongside supporting people, prioritises the gathering and recording of people's experiences of services. By connecting areas of individual feedback together, the charity draws together key themes and emerging trends in mental health experiences. These are reported quarterly in the SUF publication titled 'Making our Voice Count' which is presented to providers, commissioners and to strategic partners, to assist with decision-making and to promote coproduction, so that providers and commissioners can understand and actively respond to the current lived experience of people with emotional wellbeing and mental health needs.



# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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##### **Objectives and activities** *(continued)*

**SUF's mission** is to be an inclusive and trusted mental health user-led network that values, promotes, and strengthens the user voice for positive change, independence, legal rights, choice, and control.

**SUF's vision** is to become the leading organisation for adults in Suffolk championing equal and valued partnerships between mental health service users, commissioners, and providers, combining mutual strengths and experience to improve services, achieving emotional wellbeing and mental health for all.

**SUF's values** were coproduced at the SUF AGM in 2018:

1. We are open, honest, and trustworthy
2. We are inclusive and have people at our heart
3. We are caring & compassionate.
4. We speak out together to make a difference

##### **Charitable Objectives**

The charity can help people in Suffolk, Norfolk and Essex. It has five main objectives.

- a) To promote partnership working between service providers, including the NHS and Social Care, service users and family/parent carers.
- b) To promote suicide prevention initiatives.
- c) To provide advocacy services, peer support and information to empower people to make their own decisions.
- d) To promote better understanding of mental health and emotional wellbeing.
- e) To promote volunteering and peer support.

##### **Public Benefit**

In shaping our objectives for the year and planning our activities, the trustees have considered the Charity Commission's guidance on Public Benefit including, The Public Benefit Requirement (PB1), Running a Charity (PB2) and Reporting (PB3).

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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#### Achievements and performance

##### 1. Peer Advocacy

Our peer advocate has delivered mental health advocacy to 483 inpatients who have been admitted into acute mental health hospitals in Suffolk at a time of crisis.

On average (2018-2021) 40% of inpatients are detained under the Mental Health Act and 60% are voluntarily admitted. Voluntary (informal) patients have no statutory access to advocacy. Our peer advocacy has no eligibility criteria and is accessible to all inpatients.

This ensures that informal patients receive advocacy support to have their views heard and understood.

Our peer advocate delivers a weekly drop-in service to Woodlands (Ipswich), Wedgwood House (Bury St Edmunds) and monthly drop ins to Foxhall House.

Advocacy ensures that patients know and understand their rights, choices, options, and their voice heard.

During this year, our peer advocate has listened to inpatients' concerns about information regarding fire safety. Inpatients were concerned that bedrooms did not provide information about what they needed to do in the event of a fire. Working together with the Trust's fire safety professionals, we were able to explain inpatients' concerns, coproducing new fire safety information for patients, which has now been rolled out across all inpatient areas in the trust.

As the year comes to an end, we are pleased to report that SUF is now a partner in the new Suffolk Advocacy Service. This new partnership is made up of POhWER and three long-established and experienced local advocacy providers: Ace Anglia, Suffolk Family Carers and Suffolk User Forum. Together we have a stronger voice and greater influence to make an even bigger difference to people's lives.

##### 2. Healthy Together

##### **SUF peer support for people living with severe mental illness (SMI)**

It has been known for many decades that the average life expectancy for people living with severe mental illness (SMI) is up to twenty years shorter than the general population.

SMI includes people living with schizophrenia, psychosis, and bipolar disorders.

Reduced life expectancy is mostly due to preventable physical health problems which are often not diagnosed or managed effectively.

Working with Commissioners and our partners in the Norfolk and Suffolk NHS Foundation Trust (the Suffolk Physical Health Team) SUF has developed an innovative team to address this inequality. Our aim is to ensure physical health and mental health are meaningfully integrated, with people receiving the right support at the right time. With more than 3800 people in Suffolk living with SMI, Annual Physical Health Checks provide a vital opportunity to identify and address physical health needs.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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To support this project, we became a member of 'Equally Well' in 2021 and made changes to our ICT system to meet the requirements of NHS Digital, attaining 'standards met' status in May 2022. SUF believes that physical and mental health should be given the same respect and care. Importantly our Healthy Together Project supports people to take control of their lives and their personal health care goals. Service users tell us that our additional peer support makes all the difference. Project data has shown that our support increased the uptake of healthcare follow up appointments and the achievement of wellbeing goals by 92%. This led to significant improved health outcomes for some of the most vulnerable people in our community. Whilst 66% of support needs were identified by professionals, a further 34% of previously unidentified needs were uncovered once our Healthy Together Peer Support became involved.

As the year ends, we are proud to report that due to the success of our Healthy Together project we have now secured funding for 2022/23. The project will now to be expanded to offer support to people who receive their SMI Annual Health Checks by primary care practitioners, providing the service to approx. 400 people in the coming year. If you would like to receive our Healthy Together Peer Support, at your next SMI Annual Health Check ask the practitioner from your GP surgery or the Suffolk Physical Health Team, to make a referral to us.

### **3. Suicide Prevention**

**We want to ensure that fewer lives are lost to suicide, and that people receive the best possible support.**

This year we have continued to influence and support the prevention of suicide.

We presented service user feedback, and suicide prevention reports to the Suffolk Suicide Prevention strategy group, including, your feedback for Coproduction for the Suffolk Suicide Prevention Strategy and our coproduced publication LISTEN for Suicide Prevention. Working with the East Anglian Daily Times (EADT) we have contributed to their wellbeing event, leading on starting conversations for suicide prevention.

Key areas of feedback we have shared have included the need to support professionals and GPs to better understand feelings of suicide, the language used and people's mental health needs; the need for a timely response by mental health psychiatric liaison and crisis care services.

As the reporting year ends, we are developing an animated film based on LISTEN to support safe and compassionate conversations about suicidal feelings, enabling people to listen and feel confident to ask questions, to bring hope and reassurance that says, 'I care, and you are not alone'.

We have been an active partner in the redesign and recommissioning of the new support service for people who have been bereaved by suicide. This service is now provided by Victim Support. Our Suicide Prevention Lead has been proactive in supporting referrals, to ensure people get the support they need following the loss of a loved one to suicide. For more Information about Bereaved by Suicide Support call 01473 322683.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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We continue to promote suicide prevention resources and support using the Stay Alive App. The App has grown in 2021/22.

- 600+ new users.
- Over 44,500 views resources and support pages.

#### **4. Signposting for Support**

##### **Help to find the right support, at the right time**

SUF has a key role in helping service users and family/parent carers to find the help and support they need. We work with people one-to-one. By listening to people's needs, we provide signposting information, choices, and options for support wherever possible.

This year we have supported 749 people with one-to-one support for signposting, with 55,645 website views for signposting. We know from speaking to service users and family/parent carers that the mental health system is complex to navigate.

There are often barriers to accessing support, people are sometimes signposted to services that no longer exist, or which cannot meet their needs. We identify gaps in services and support, reporting these to commissioners. Key areas where there is insufficient support:

- Services for people living with personality disorders.
- Support for those who experience dissociative disorders.
- Access to NHS dentists.
- Support for people living with autism.

As the year ends we are progressing conversations with our local commissioners to ensure that those living with SMI, are not further disadvantaged by this health inequality.

This year SUF has joined the Suffolk Information Partnership (SIP). SIP is a network of organisations supporting people in Suffolk with information and services around care, health, and wellbeing.

The aim of the Partnership is to work together to provide clear, consistent, quality information to customers and a seamless journey for those needing to access services.

#### **5. Making Our Voice Count**

##### **Together we are stronger and can make a difference**

We know that people's individual stories and feedback empower service user leadership which is essential to improve services. We collate and report your experiences in our regular publication 'Making Our Voice Count' which is presented to strategic NHS and Suffolk County Council (SCC) leaders, mental health providers and the Care Quality Commission, informing decision making.

This year we published six reports, identifying important areas for service improvement, working with commissioners to inform the design of new services and improvements to existing services.

We listened to your views and experiences of the specialist Joint Engagement Team (JET) also known as

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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Serenity Intensive Mentoring (SIM). SIM was a nationally recognised mentoring programme for mental health service users who come into frequent contact with healthcare and emergency services. Service users told us that they had no confidence in this SIM model.

Service users have asked to be involved in the future design of services for people with complex needs, to ensure they get best possible care, with all the necessary safeguards and crisis responses required.

We will continue working with NHS Commissioners and Suffolk County Council to support user involvement in these services. As this reporting year ends, we have published our coproduced special report on eating disorder services. We will be following up our Call for Action at a future Healthwatch Suffolk Mental Health Focus Group.

#### **6. Our Membership**

SUF is a membership organisation, with 498 individual members, 59 group members, with a reach of over 43,662 people. This year our membership has remained strong.

Our social media presence on both Twitter and Facebook has steadily grown, with 2149 followers on Twitter (7.1% increase) and over 371,700 Impressions. Our Facebook followers have grown to 2000.

SUF is committed to undertake voice-of-the-member research as a way of understanding first-hand what our members value and want from their SUF membership, and how well they perceive we are delivering on these.

#### **7. Our Events in 2021/22**

SUF has held ten events for members this year. These include the post covid wellbeing event discussing 'How do we heal?', and involvement for a new care planning app offering feedback for improvements to make the app more user friendly.

Members have also been enabled to speak up and have their say on developments for the new West Suffolk Hospital, and work at Ipswich Hospital to support the East Suffolk and North East Essex NHS Foundation Trust in its work to become a mentally healthy acute trust.

In the Impact report we feature two event highlights.

We would like to thank all presenters at our events for their time and for sharing their experiences with us, and our members.

#### **8. Looking Ahead to 2022/23**

Our goals and commitments for the coming year are outlined in the plans for future periods note of the accounts.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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##### Financial review

The charity's income in 2021/22 was £173,768 (2020/21: £218,440) of which £66,068 (2020/21: £89,258) related to project restricted activities. The charity's expenditure in 2021/22 was 168,420 (2020/21: £176,790) of which £64,354 (2020/21: £89,258) related to project restricted activities. The net surplus of £5,348 (2020/21: £41,650) has continued to contribute to the charity's general reserves.

##### Principal funding sources

The largest component of the charity's income is received under a funding agreement with Suffolk County Council and the Ipswich & East Suffolk Clinical Commissioning Group (CCG) and West Suffolk CCG via a tri-part fund called the Mental Health Pooled Fund. This funding agreement is overseen by Suffolk County Council, who awarded the Charity a three-year partnership contract commencing from 1st April 2019 and ending on 31st March 2022.

SUF has continued as an advocacy partner within the Total Voice Suffolk (TVS) Partnership, who were awarded the contract for Suffolk Advocacy services from 1st April 2017. The SUF contract within this partnership changed in February 2020, to include only the provision of inpatient independent mental health advocacy.

Additional funding was awarded in February 2021 to deliver a new peer support pilot project called Healthy Together. This project delivers peer support and personalised care planning, providing emotional and practical help for people living with severe mental illness (SMI), to help access their physical health entitlements and achieve wellbeing goals.

##### Investment policy and performance

The charity's policy is to invest any surplus funds in an Easy Access bank account. The charity has a Business Deposit Account with the Ipswich Building Society and with the Nationwide Building Society.

##### Reserves policy

The Trustees remain committed to providing maximum possible service levels. The Trustees have continued to retain SUF reserves during this financial year to provide the charity with reserves equal to at least 6-months operating costs.

It is our revised policy to maintain current general reserves equivalent to six months projected operating expenditure, plus redundancy and statutory notice costs of £31,000 and £12,000 to replace IT equipment. This equates to £191,881 (2020/21: £80,766). Reserves on unrestricted funds at 31 March 2022 are £157,954 (2020/21: £154,320). The Trustee board will continue to review the reserves policy during the forthcoming year and aim to increase income in the coming year as and where appropriate.

Financial reserves are SUF's savings, helping to strengthen the charity and its sustainability. They help SUF to pay for activities that donors will not fund or handle unplanned events. They also provide additional operating funds over and above the core funding provided by the Mental Health Pooled Fund.

General reserves must be built up from unrestricted income; any surplus on a restricted project is tied to the same restrictions as the original project and may not be transferred to unrestricted funds without the donors' consent.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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##### Plans for future periods

This reporting year (2021/22) is the third year of a three-year partnership and funding agreement with Suffolk County Council. It is also the final year of the charity's advocacy funding contract, as a partner within Total Voice Suffolk.

Trustees' top priority this fiscal year has been to secure sustainable, long-term funding to ensure ongoing service delivery and support to beneficiaries, through specific project work, alongside promoting the voices of individual people living with mental ill health, and the shared interests of mental health service users collaboratively.

As the reporting year closes, the board of trustees are pleased to report that our core funding has been confirmed for a further year (2022/23). Securing longer term core financial sustainability continues to be a top priority going forward into the new fiscal year.

We are pleased to report that our partnership funding bid for the new Suffolk Advocacy Service has also been successful. This partnership is made up of POhWER, a national advocacy organisation who is the lead partner and three long-established and experienced local advocacy providers including Suffolk User Forum, Ace Anglia, and Suffolk Family Carers. Trustees are pleased the charity will be able to continue to deliver peer led inpatient mental health advocacy for a further three years (commencing 1st April 2022).

Trustees are wholly committed to service user leadership, involvement, personalisation, and co-production working together with our local statutory partners, Suffolk County Council and NHS, supporting the developing Integrated Care System (ICS), promoting the mental health service user voice. We aim to continue to grow our mental health user led network, to ensure the voice of lived experience informs and shapes new and existing mental health services, placing the voice of lived experience at the heart of suicide prevention, service improvement and development.

Our key priorities for the next period include:

1. Making Our Voice Count - continuing to raise people's voices and lived experience to ensure mental health services, organisations and policies are led and shaped by the people best placed to know what works. People who use mental health services are experts by experience.

2. To continue actively promoting service user priority areas for mental health improvement. Including:

- Raising and promoting LISTEN as a model for personalised crisis care support and suicide prevention.
- Awareness raising to change the language used for suicide prevention through 'Suicide is not a Choice Change the language Save a life - Be the change.'
- Championing personalisation and reasonable adjustments for mental health service users.
- User involvement for the developing services and support for people living with Personality Disorders and complex needs.
- User involvement for the developing services and support for people living with eating disorders.
- Championing improved discharge planning for people transitioning from secondary mental health services to primary care support.

3. To continue to strengthen our local partnerships, supporting the County Council and local NHS to discharge their statutory responsibilities for mental health service user involvement, coproduction, information, assistance, and advocacy in relation to adult mental health service users.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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4. Expand the SUF Healthy Together Project, promoting the healthcare rights and goals for people living with severe mental illness (SMI) (which includes Schizophrenia, Bipolar Disorder, and Psychosis).

5. To widen the expertise and lived experience of our trustee board, to include Financial and Accountancy skills, welcoming trustees from our local ethnic minority communities, women, and younger people.

Our key commitments are:

- To work across all communities and protected characteristics with particular regard to groups where there is evidence of under-representation and/or greater discrimination.
- To develop our skills and capacity to support service user leadership and volunteer roles within our charity. Supporting people to gain skills and self-confidence as active citizens, building capacity to increase our support to people living with mental distress and mental health needs.



# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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#### **Structure, governance, and management**

Suffolk User Forum is a charitable company limited by guarantee, incorporated on the 29th June 2009 and registered as a charity (registered number 1133457) on the 5th January 2010.

The company was established under a memorandum of association which sets out the objects and powers of the charitable company and is governed under its articles of association. The liability of the members is limited and the Memorandum and Articles were updated on 3rd December 2022.

#### **Trustee Board**

The directors of Suffolk User Forum are known as trustees for the purposes of charity law and under the company's Articles of Association are known as members of the Trustee Board. Recruitment to Suffolk User Forum's Trustee Board seeks to ensure that the organisation's desire to remain service user-led is appropriately reflected through the diversity of the Trustee body.

Currently 88% of the SUF Trustee Board have used or currently use mental health services as a service user or family carer. The charity is described as a Disabled Persons Organisation as over 75% of its trustees and 100% of its staff have lived experience of mental ill health and the charity works within the ethos of the social model of disability.

#### **Recruitment and appointment of Trustee Board**

Business, public sector, mental health, social care, family carer and service user skills remain well represented on the Trustee Board. This has been supported by a robust recruitment policy and procedure. SUF advertises vacancies for new trustees through the SUF website and social media, Reach Volunteering, Suffolk Volunteering and through its wider networks and partnerships. In 2021/22 SUF recruited new trustees, with skills in law, business, community and voluntary services development and lived experience of mental illness.

The Trustee Board actively encourages and welcomes applications from people of all backgrounds particularly welcoming applications from ethnic minority communities, women, and younger people, as they are currently underrepresented on the Trustee Board.

Potential trustees are invited to meet SUF trustees and the chief executive to familiarise themselves with the charity and the context within which it operates. All applicants are asked to apply (using the SUF application form) to the Trustee Board.

Applications are shortlisted by the Chair of Trustees in partnership with at least one other Trustee, who form the recruitment team supported by the Company Secretary. An interview is conducted by this recruitment team which writes an Interview Report. This is submitted at the earliest board meeting for a board discussion and a decision made regarding suitability for appointment. Trustees are appointed by the trustee Board initially until the next annual members' meeting when the appointment is put to a vote. Trustees normally serve a term of three years before reappointment at the next annual members' meeting.

#### **Trustee Induction and Training**

All new Trustees receive governance and business documentation relevant to their role, induction, and training.

New Trustees are provided with essential documents to support them in their role.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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These include;

1. The obligations of the Trustee Board members including the Declaration of Interests, Code of Conduct and Agreement, Trustees' roles, and a self-reported skills audit, to inform the board's overall skills report, which is regularly reviewed by the board to ensure a balance of knowledge and skills across the trustee Board, and to inform the board's annual training plan for Trustees.
2. The main documents which set out the operational framework for the charity including the Memorandum and Articles of association of Suffolk User Forum.
3. A copy of all partnership and funding agreements, including those with Suffolk County Council and Total Voice Suffolk.
4. Copies of Contract Review Meetings.
5. Resourcing and the current financial position as set out in the latest published accounts.
6. The charities aims and objectives.
7. The current business/operational plan.
8. The current structure of the organisation including its staff.
9. The current project plans and reports.
10. The latest SUF publications including the quarterly service user feedback reports titled 'Making our voice count'.
11. This documentation is supported by a Trustee Induction programme which provide forums for wider discussion regarding the governing documents, explanation of aims and objectives and of the charity's business and action plan, including strategic plans. All new trustees are encouraged to complete on-line training provided in Suffolk by Community Action Suffolk as part of their induction to ensure they understand their trustee role and responsibilities.

The SUF new Trustee induction programme includes receiving information about key SUF policies and procedures which include:

1. Information Governance including confidentiality, data security, data protection, and the SUF Privacy Statement.
2. Equality and Diversity.
3. Safeguarding of Children and Vulnerable Adults.
4. Health and safety including, COVID safety, lone working, and risk management.
5. Comments, compliments, and complaints.
6. Social Value Strategy.
7. Environmental Strategy.

# Suffolk User Forum

## Company Limited by Guarantee

### Trustees' annual report (incorporating the directors' report) *(continued)*

#### Year ended 31 March 2022

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8. The SUF Staff and Volunteer Handbook.

#### **Risk assessment**

The Trustees have assessed the major risks to which the charity is exposed and holds a Risk Register that is reviewed at least four times a year at board meetings to ensure that the board are satisfied that systems are in place to mitigate exposure to the major risks.

#### **Small company provisions**

This report has been prepared taking advantage of the small companies' exemption of section 415A of the Companies Act 2006.

The trustees' annual report was approved on ..... and signed on behalf of the board of trustees by:

G Pachent  
(Chair)

# Suffolk User Forum

## Company Limited by Guarantee

### Independent examiner's report to the trustees of Suffolk User Forum

Year ended 31 March 2022

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I report to the charity trustees on my examination of the financial statements of the company for the year ended 31 March 2022 which comprise the statement of financial activities (including income and expenditure account), balance sheet and the related notes.

#### Responsibilities and basis of report

As the charity's trustees of the company (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the financial statements of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's financial statements as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

#### Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. the financial statements do not accord with those records; or
3. the financial statements do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination; or
4. the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

L Thurston FCCA  
Independent Examiner

Lovewell Blake LLP  
Chartered accountants  
First Floor Suite  
2 Hillside Business Park  
Bury St Edmunds  
IP32 7EA

# Suffolk User Forum

## Company Limited by Guarantee

### Statement of financial activities (including income and expenditure account)

Year ended 31 March 2022

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		Unrestricted funds	2022 Restricted funds	Total funds	2021 Total funds
	Note	£	£	£	£
<b>Income and endowments</b>					
Donations and legacies	5	107,472	55,190	162,662	207,263
Investment income	6	228	–	228	299
Other income		–	10,878	10,878	10,878
<b>Total income</b>		<u>107,700</u>	<u>66,068</u>	<u>173,768</u>	<u>218,440</u>
<b>Expenditure</b>					
Charitable activities	7	104,066	64,354	168,420	176,790
<b>Total expenditure</b>		<u>104,066</u>	<u>64,354</u>	<u>168,420</u>	<u>176,790</u>
<b>Net income and net movement in funds</b>		<u>3,634</u>	<u>1,714</u>	<u>5,348</u>	<u>41,650</u>
<b>Reconciliation of funds</b>					
Total funds brought forward		154,320	5,436	159,756	118,106
<b>Total funds carried forward</b>		<u>157,954</u>	<u>7,150</u>	<u>165,104</u>	<u>159,756</u>

The statement of financial activities includes all gains and losses recognised in the year.  
All income and expenditure derive from continuing activities.

The notes on pages 21 to 29 form part of these financial statements.

# Suffolk User Forum

## Company Limited by Guarantee

### Balance sheet

31 March 2022

	Note	2022 £	£	2021 £	£
<b>Fixed assets</b>					
Tangible fixed assets	11		2,148		2,582
<b>Current assets</b>					
Debtors	12	8,450		4,763	
Cash at bank and in hand		320,120		186,624	
		<u>328,570</u>		<u>191,387</u>	
<b>Creditors: Amounts falling due within one year</b>	13	<u>(165,614)</u>		<u>(34,213)</u>	
<b>Net current assets</b>			<u>162,956</u>		<u>157,174</u>
<b>Total assets less current liabilities</b>			<u>165,104</u>		<u>159,756</u>
<b>Net assets</b>			<u>165,104</u>		<u>159,756</u>
<b>Funds of the charity</b>					
Restricted funds			7,150		5,436
Unrestricted funds			<u>157,954</u>		<u>154,320</u>
<b>Total charity funds</b>	16		<u>165,104</u>		<u>159,756</u>

For the year ending 31 March 2022 the charity was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476;
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of financial statements.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

These financial statements were approved by the board of trustees and authorised for issue on ....., and are signed on behalf of the board by:

G Pachent  
(Chair)

Company registration number: 06946785

The notes on pages 21 to 29 form part of these financial statements.

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements

Year ended 31 March 2022

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#### 1. General information

The charity is a public benefit entity and a private company limited by guarantee, registered in England and Wales and a registered charity in England and Wales. The operational address and registered office is 3 Grange Business Centre, Kesgrave, Ipswich, IP5 2BY.

#### 2. Statement of compliance

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

#### 3. Accounting policies

##### Basis of preparation

The financial statements have been prepared on the historical cost basis, as modified by the revaluation of certain financial assets and liabilities and investment properties measured at fair value through income or expenditure.

The financial statements are prepared in sterling, which is the functional currency of the entity.

##### Going concern

The accounts have been prepared on the ongoing concern basis and the Trustees believe that no material uncertainties exist. The Trustees have considered the level of funds held and the expected income and expenditure for the next 12 months from authorising these financial statement. The budgeted income and expenditure is sufficient with the level of reserves for the Charity to be able to continue as a going concern.

##### Fund accounting

Unrestricted funds are available for use at the discretion of the trustees to further any of the charity's purposes.

Designated funds where necessary, are unrestricted funds earmarked by the trustees for particular future project or commitment.

Restricted funds are subjected to restrictions on their expenditure declared by the donor or through the terms of an appeal and fall into one of two sub-classes: restricted income funds or endowment funds.

##### Income

All income is included in the statement of financial activities when entitlement has passed to the charity, it is probable that the economic benefits associated with the transaction will flow to the charity and the amount can be reliably measured. The following specific policies are applied to particular categories of income:

- income from donations or grants is recognised when there is evidence of entitlement to the gift, receipt is probable and its amount can be measured reliably.

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

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#### 3. Accounting policies *(continued)*

##### Income *(continued)*

- legacy income is recognised when receipt is probable and entitlement is established.
- income from donated goods is measured at the fair value of the goods unless this is impractical to measure reliably, in which case the value is derived from the cost to the donor or the estimated resale value. Donated facilities and services are recognised in the accounts when received if the value can be reliably measured. No amounts are included for the contribution of general volunteers.
- income from contracts for the supply of services is recognised with the delivery of the contracted service. This is classified as unrestricted funds unless there is a contractual requirement for it to be spent on a particular purpose and returned if unspent, in which case it may be regarded as restricted.

##### Expenditure

Expenditure is recognised on an accruals basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is classified under headings of the statement of financial activities to which it relates:

- expenditure on raising funds includes the costs of all fundraising activities, events, non-charitable trading activities, and the sale of donated goods.
- expenditure on charitable activities includes all costs incurred by a charity in undertaking activities that further its charitable aims for the benefit of its beneficiaries, including those support costs and costs relating to the governance of the charity apportioned to charitable activities.
- other expenditure includes all expenditure that is neither related to raising funds for the charity nor part of its expenditure on charitable activities.

All costs are allocated to expenditure categories reflecting the use of the resource. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs are apportioned between the activities they contribute to on a reasonable, justifiable, and consistent basis.

##### Operating leases

Lease payments are recognised as an expense over the lease term on a straight-line basis. The aggregate benefit of lease incentives is recognised as a reduction to expense over the lease term, on a straight-line basis

##### Tangible assets

Tangible assets are initially recorded at cost, and subsequently stated at cost less any accumulated depreciation and impairment losses. Any tangible assets carried at revalued amounts are recorded at the fair value at the date of revaluation less any subsequent accumulated depreciation and subsequent accumulated impairment losses.

An increase in the carrying amount of an asset as a result of a revaluation, is recognised in other recognised gains and losses, unless it reverses a charge for impairment that has previously been recognised as expenditure within the statement of financial activities. A decrease in the carrying amount of an asset as a result of revaluation, is recognised in other recognised gains and losses, except to which it offsets any previous revaluation gain, in which case the loss is shown within other recognised gains and losses on the statement of financial activities.



# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

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#### 3. Accounting policies *(continued)*

##### Depreciation

Depreciation is calculated so as to write off the cost or valuation of an asset, less its residual value, over the useful economic life of that asset as follows:

Computer equipment	-	25% straight line
Office furniture	-	25% straight line

##### Financial instruments

A financial asset or a financial liability is recognised only when the entity becomes a party to the contractual provisions of the instrument.

Basic financial instruments are initially recognised at the amount receivable or payable including any related transaction costs, unless the arrangement constitutes a financing transaction, where it is recognised at the present value of the future payments discounted at a market rate of interest for a similar debt instrument.

Current assets and current liabilities are subsequently measured at the cash or other consideration expected to be paid or received and not discounted.

Debt instruments are subsequently measured at amortised cost.

##### Defined contribution plans

Contributions to defined contribution plans are recognised as an expense in the period in which the related service is provided. Prepaid contributions are recognised as an asset to the extent that the prepayment will lead to a reduction in future payments or a cash refund.

When contributions are not expected to be settled wholly within 12 months of the end of the reporting date in which the employees render the related service, the liability is measured on a discounted present value basis. The unwinding of the discount is recognised as an expense in the period in which it arises.

#### 4. Limited by guarantee

The company is limited by guarantee and does not have a share capital. Every member of the company undertakes to contribute to the assets of the company if it is wound up during the time that he or she is a member, or within one period afterwards, for payment of the debts and liabilities of the company contracted before the time at which he or she ceases to be a member and of the costs, charges and expenses of winding up and for the adjustment of the rights of the contributors among themselves such amount as may be required not exceeding £10.

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

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##### 5. Donations and legacies

	Unrestricted Funds £	Restricted Funds £	Total Funds 2022 £
<b>Donations</b>			
Donations	57	–	57
<b>Grants</b>			
Mental Health Pooled Fund	107,415	–	107,415
Suffolk County Council (Covid -19)	–	–	–
NHS West Suffolk CCG	–	6,343	6,343
NHS Ipswich and East Suffolk CCG	–	48,847	48,847
	<u>107,472</u>	<u>55,190</u>	<u>162,662</u>
	Unrestricted Funds £	Restricted Funds £	Total Funds 2021 £
<b>Donations</b>			
Donations	340	–	340
<b>Grants</b>			
Mental Health Pooled Fund	107,415	–	107,415
Suffolk County Council (Covid -19)	–	20,000	20,000
NHS West Suffolk CCG	4,150	–	4,150
NHS Ipswich and East Suffolk CCG	6,100	69,258	75,358
	<u>118,005</u>	<u>89,258</u>	<u>207,263</u>

##### 6. Investment income

	Unrestricted Funds £	Total Funds 2022 £	Unrestricted Funds £	Total Funds 2021 £
Building society interest	<u>228</u>	<u>228</u>	<u>299</u>	<u>299</u>

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

#### 7. Expenditure on charitable activities

	Unrestricted Funds £	Restricted Funds £	Total Funds 2022 £
Staff costs	64,078	56,068	120,146
Staff and volunteer expenses	2,420	–	2,420
Support costs	37,568	8,286	45,854
	<u>104,066</u>	<u>64,354</u>	<u>168,420</u>

	Unrestricted Funds £	Restricted Funds £	Total Funds 2021 £
Staff costs	49,764	89,258	139,022
Staff and volunteer expenses	1,249	–	1,249
Support costs	36,519	–	36,519
	<u>87,532</u>	<u>89,258</u>	<u>176,790</u>

#### Analysis of support costs

	2022 £	2021 £
Office rent	14,254	13,080
Rates	960	512
Light and heat	3,210	1,671
Telephone	2,924	3,219
Payroll bureau	648	895
Computer and website costs	5,824	5,845
Equipment hire	1,724	2,555
Postage and stationery	718	1,481
Repairs and renewals	156	83
Marketing	8,286	1,834
Insurance	1,546	1,023
Depreciation	1,433	1,799
Trustees' expenses	465	435
Sundry expenses	945	303
Legal and professional fees	997	384
Independent examination fee	1,764	1,400
	<u>45,854</u>	<u>36,519</u>

#### 8. Net income

Net income is stated after charging/(crediting):

	2022 £	2021 £
Depreciation of tangible fixed assets	<u>1,433</u>	<u>1,799</u>

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

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#### 9. Staff costs

The total staff costs and employee benefits for the reporting period are analysed as follows:

	<b>2022</b>	2021
	£	£
Wages and salaries	112,997	129,480
Social security costs	5,197	5,763
Pension costs	1,952	3,779
	<u>120,146</u>	<u>139,022</u>

The average head count of employees during the year was 5 (2020/21: 7).

Travel expenses were paid during in the period amounting to £297 (2020/21: £368), with none of the Trustees being paid expenses as users.

#### 10. Trustee remuneration and expenses

The key management personnel of the charity comprise the trustees and the Chief Executive. The trustees neither received nor waived any remuneration during the year (2020/21: £Nil). The total amount of employee benefits (including employer pension contributions) received by senior management for their services to the charity was £47,819 (2020/21: £49,927).

#### 11. Tangible fixed assets

	<b>Computer equipment</b>	<b>Office furniture</b>	<b>Total</b>
	£	£	£
<b>Cost</b>			
At 1 April 2021	17,214	2,431	19,645
Additions	999	–	999
<b>At 31 March 2022</b>	<u>18,213</u>	<u>2,431</u>	<u>20,644</u>
<b>Depreciation</b>			
At 1 April 2021	15,467	1,596	17,063
Charge for the year	947	486	1,433
<b>At 31 March 2022</b>	<u>16,414</u>	<u>2,082</u>	<u>18,496</u>
<b>Carrying amount</b>			
<b>At 31 March 2022</b>	<u>1,799</u>	<u>349</u>	<u>2,148</u>
At 31 March 2021	<u>1,747</u>	<u>835</u>	<u>2,582</u>

#### 12. Debtors

	<b>2022</b>	2021
	£	£
Prepayments and accrued income	7,980	4,763
Other debtors	470	–
	<u>8,450</u>	<u>4,763</u>

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

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#### 13. Creditors: Amounts falling due within one year

	<b>2022</b>	2021
	<b>£</b>	£
Trade creditors	5,369	1,382
Accruals and deferred income	160,245	30,683
Other creditors	–	2,148
	<u>165,614</u>	<u>34,213</u>

#### 14. Deferred income

	<b>2022</b>	2021
	<b>£</b>	£
At 1 April 2021	29,333	–
Amount released to income	(29,333)	–
Amount deferred in year	158,643	29,333
<b>At 31 March 2022</b>	<u>158,643</u>	<u>29,333</u>

#### 15. Pensions and other post-retirement benefits

The amount recognised in income or expenditure as an expense in relation to defined contribution plans was £1,952 (2020/21: £3,779).

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

#### 16. Analysis of charitable funds

##### Restricted funds

	At 1 April 2021 £	Income £	Expenditure £	Transfers £	At 31 March 2022 £
Mental Health Service User expenses	4,690	–	–	–	4,690
SCC Waveney Peer Support	746	–	–	–	746
Healthy Together	–	45,190	(45,190)	–	–
Suicide Prevention	–	10,000	(8,286)	–	1,714
Advocacy	–	10,878	(10,878)	–	–
	<u>5,436</u>	<u>66,068</u>	<u>(64,354)</u>	<u>–</u>	<u>7,150</u>

	At 1 April 2020 £	Income £	Expenditure £	Transfers £	At 31 March 2021 £
Mental Health Service User expenses	4,690	–	–	–	4,690
SCC Waveney Peer Support	746	–	–	–	746
COVID work for SUF members	–	20,000	(20,000)	–	–
COVID work for shielded persons	–	53,591	(53,591)	–	–
Healthy Together	–	15,667	(15,667)	–	–
	<u>5,436</u>	<u>89,258</u>	<u>(89,258)</u>	<u>–</u>	<u>5,436</u>

**The Mental Health Services User expenses** - is funded by the Ipswich & East Suffolk Clinical Commissioning Group; West Suffolk Clinical Commissioning Group and Suffolk County Council, through the Suffolk Mental Health Pooled Fund, SUF have agreed to hold and administer an amount of now less than £5,000 on behalf of Suffolk County Council.

**SCC Waveney Peer Support** was funded by Suffolk County Council to support a restricted project in line with the objectives of SUF.

**COVID work for SUF members** was funded by Suffolk County Council to support a restricted project in line with the objectives of SUF.

**COVID work for shielded persons** was funded by NHS Ipswich and East Suffolk CCG to support a restricted project in line with the objectives of SUF.

**Healthy Together** was funded by NHS Ipswich and East Suffolk CCG and NHS West Suffolk CCG to support a restricted project in line with the objectives of SUF.

**Suicide Prevention** was funded by Suffolk County Council to support a restricted project in line with the objectives of SUF.

**Advocacy** was funded by Suffolk County Council to support a restricted project in line with the objectives of SUF.

# Suffolk User Forum

## Company Limited by Guarantee

### Notes to the financial statements *(continued)*

#### Year ended 31 March 2022

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#### 17. Analysis of net assets between funds

As at 31 March 2022

	Unrestricted Funds £	Restricted Funds £	Total Funds 2022 £
Tangible fixed assets	2,148	–	2,148
Net current assets	155,806	7,150	162,956
<b>Net Assets</b>	<u>157,954</u>	<u>7,150</u>	<u>165,104</u>

As at 31 March 2021

	Unrestricted Funds £	Restricted Funds £	Total Funds 2021 £
Tangible fixed assets	2,582	–	2,582
Net current assets	151,738	5,436	157,174
<b>Net Assets</b>	<u>154,320</u>	<u>5,436</u>	<u>159,756</u>

#### 18. Operating lease commitments

The total future minimum lease payments under non-cancellable operating leases are as follows:

	2022 £	2021 £
Not later than 1 year	14,425	12,529
Later than 1 year and not later than 5 years	–	2,915
	<u>14,425</u>	<u>15,444</u>

#### 19. Related parties

Other than elsewhere disclosed in the accounts, there were no related party transactions in this or the prior period.