

The Louis Ross Foundation

Charity Number: 1168723

Trustees' Annual Report and Financial Statements for the Period 2 June 2024 to 1 June 2025

March 30, 2026



Reference & Administration Details

Charity name: The Louis Ross Foundation

Charity number: 1168723

Charity's operating address: Ashley Wood House
Tarrant Keyneston
Blandford Forum
Dorset

Postcode DT11 9JG

Names of the Charity Trustees who Manage the Charity

<i>Trustee Name</i>	<i>Office</i>	<i>Appointed</i>	<i>Retired</i>
1: Penny Ross	Chair	March 2023	
2: John Ross	Treasurer	March 2023	
3: Tim Evans		March 2023	
4: Judi Tipping		March 2023	
5: Richard Stephenson		March 2023	

Names & Addresses of Advisors

	<i>Name</i>	<i>Address & Postcode</i>
Independent Examiner	Amanda Peroni F.C.C.A.	Ivy Cottage Stubhampton Blandford Forum Dorset DT11 8JU

Description of the Charity's Trusts

Type of Governing Document: Constitution

How the Charity is Constituted: Charitable Incorporated Organisation

Trustee Selection Methods: Appointed by the Board of Trustees.

How New Trustees are

Inducted and Trained: The charity trustees will make available to each new charity trustee, on or before his or her first appointment:

- (a) a copy of the current version of this constitution; and
- (b) a copy of the CIO's latest Trustees' Annual Report and statement of accounts.

Summary of the Objects of the Charity as set out in its Governing Document

- 1) The relief of those in need, by reason of youth, age, ill-health, disability, financial or other disadvantage for the public benefit, in particular, but not exclusively by, providing donations to:
 - a) Charities supporting young people or young people in Dorset, Hampshire and Wiltshire who provide regular or on-going caring support to a family member who is either physically or mentally ill, disabled or addicted to substances, by providing the resources for respite activities and practical help.
 - b) Charities in Dorset, Hampshire and Wiltshire helping homeless young people who provide shelter and sustenance with the aim of helping them return to the community and enabling them to resume a normal life.
 - c) Institutions and charities in Dorset, Hampshire and Wiltshire providing care, respite and education facilities for autistic young people and their families.
 - d) Improve the emotional resilience and mental health of children and young people throughout Dorset, Hampshire and Wiltshire by informing and actively engaging with children, young people, parents, policymakers and professionals.
- 2) To advance such charitable purposes (according to the law of England and Wales) as the trustees see fit from time to time in particular, but not limited to advancing the education of young people for the public benefit by making awards that foster innovation and opportunity to financially disadvantaged students in full-time education in Dorset, Hampshire and Wiltshire.

Summary of the Main Activities Undertaken for the Public Benefit in Relation to the Charity's Objects

The Foundation have focused in granting monies to charities, institutions that 'help young people facing difficulties' and directly to young people within the framework of the objectives documented above. The overriding criteria is that monies given must make a difference by either contributing to individuals directly to address a specific need or by contributing to a project run by the charity or institution. In advance of the approving and granting of monies, a visit/contact is made by trustees to discuss directly with the charity/institution/individuals concerned to ascertain exactly how the money will be spent, the impact it will make and arrange a follow up to ascertain the results of the contribution.

During the financial year, June 2, 2024, to June 1, 2025, the following charities/individuals have received funding from the Foundation totalling £22,481:

- George's Rockstars
- Mosaic
- Challengers
- Individual Donation for a day out through Julia's House Hospice Family Support
- Individual donation for storage facilities for medical equipment
- Individual donation for carpeting
- Langside School
- Faithworks Sleep safe
- Montacute School
- Individual donation for Promore Sling
- Individual donation for Tricycle
- Individual donation for Beanbag equipment
- Individual donation for wheelchair accessories

Additional Details Activities – Grant Making/Donations

A clear and documented account of any proposal for funding will have to be submitted to our Trustees for proposed donations to individuals, groups or projects. All applications will include and observe at a minimum the following criteria:

- a. An explanation of how funding will achieve the Foundation's objectives. The proposal must ensure how the application, whether it be from an individual, charity or organisation will directly benefit young people in difficulty in the areas outlined by the Foundation's objectives e.g. homelessness, autism, young carers, young people's mental health and education
 - b. The location of the individual, group or project must be resident or operating within Dorset, Wiltshire or Hampshire
 - c. Where funding is going towards a charity, the organisation must be registered with the Charity Commission for England and Wales. Preference will be given to local charities when making donations
 - d. The time period within which the proposal is valid must be one year. (Subsequent future funding applications will have to be submitted for re-approval by the Trustees)
 - e. Donations to individuals will be limited to £1,250.00 in any 12-month period. (Variation to this will be at the discretion of the Board of Trustees)
 - f. For funding given to individuals, a letter of support (from a qualified medical, social care professional or educationalist) should accompany the proposal
2. Organisations will be required to demonstrate the benefit of any donations made by the Foundation by providing an impact report to the Board of Trustees within an agreed time period.

Statutory Declaration

The trustees declare that they have complied with their duty to have due regard to the guidance on public benefit published by the commission in exercising their powers or duties.

Summary of the Main Achievements of the Charity for the Year

This Trustee report represents activity within the period June 2, 2024, to June 1, 2025 (as defined by the Charity Commission).

Donations Made

We are proud to have **donated a total of £22,481** to the following worthy causes/charities during the financial year, in line with our mandate:

- **GEORGE'S ROCKSTARS £2,000** - We were so pleased to make another donation to a cause that has the power of music at its heart. This charitable organisation was founded in memory of little George who sadly lost his life aged just 6, to leukaemia. Whilst in hospital, music therapy became the highlight of the week for George and from this memory, George's family established George's Rockstars which provides music therapy to make children in hospital smile. This provision really does help sick children and their families live more creatively and resourcefully in the face of illness, disability and trauma. Our funding covered the cost of 80 hours of therapy on the children's cardiac unit at Southampton Hospital.
- **MOSAIC £2,000** - Mosaic is a wonderful Dorset-based charity that supports young people and children who have lost a loved one and are affected by bereavement. Our £2,000 was to cover the cost of a fun Sailing Activity Day during which friendships can be formed with others in the same situation. During the day, 11 children and young people enjoyed a morning on the water followed by lunch and a Bereavement café, giving families the chance to speak about their grief.
- **CHALLENGERS £1,850** - We were pleased to donate to Challengers once again, supporting their Youth Scheme work in assisting disabled young people to have fun. Our donation enabled five disabled young people to enjoy a day of fun-filled activities at their Eastleigh Youth Scheme! Challengers Youth Schemes are places where disabled young people can come to have fun, spend time with their friends and take part in exciting trips and activities, despite the severity or complexity of their needs.
- **INDIVIDUAL DONATION £200** - We were approached by Julia's House Family Liaison, asking us to fund a special day-out for a family who deserve every helping hand possible. Julia's House is a children's hospice located in Corfe Mullen, Dorset and cares for children with life-limiting, life-threatening or terminal conditions and for their families. Sadly, the family in this situation had recently lost their young child previously cared for by Julia's House and now needed to spend quality time with their other very young child but didn't have the funds for days out. Our funding paid for a day at Longleat.
- **INDIVIDUAL DONATION £233** - Another application from Julia's House Family Support requested funding for special storage. In this instance, the funding was required to assist a local family whose son has severe medical conditions which are life-limiting. The family have recently had adaptations to their home and have created a personal space in which their son can receive his care. The storage required was for medical supplies and hygiene needs.

- **INDIVIDUAL DONATION £558** - We were approached by a local Bryanston family whom we had assisted previously and who do not have the funds to spend on their home. Of their three children, two have special needs – one medical and one behavioural. Our funding paid for much-needed new carpeting for the children's bedrooms, and we know how much this will have improved living conditions within the family home.
- **LANGSIDE SCHOOL £5,161** - Langside School is a very special place, and we have been privileged to visit on several occasions – only by visiting could anyone understand how very special it is! Langside is a Diverse Abilities visionary school and is for children aged 2-19 with very complex needs. The team at Langside provides a full sensory and therapeutic approach to meeting the needs of the pupils and includes teachers, medical specialists and therapists. On this occasion, we were pleased to fund specialist IT equipment which will open-up a world of accessible communication and play for the pupils. Our funding also covered the cost of two FastLift tables which are height-adjustable and on wheels. This versatility is important as adjusting from a sitting to a standing position can help pupils build and maintain muscle mass.
- **MONTACUTE SCHOOL £3,300** - We were so pleased to make this donation to Montacute School, a very special school in Poole. Montacute supports pupils ranging in age from 3-19 and sees each child as unique in their talents and needs. At Montacute, music features as a very important part of the curriculum and our donation paid for a term's input from 'Music Jack' enabling each class to have a weekly session.
- **INDIVIDUAL DONATION £272** - We were approached by one of Julia's House Children's Hospice Family to assist a family with limited funds who were finding difficulties caring for their 5-year-old. This gorgeous little girl has Epilepsy, Microcephaly and Rett type symptoms and is non-weight bearing. Her family were finding it difficult to safely transfer her from her bed to a shower chair and in/out of the bath, especially as they have limited bathroom space. Our donation funded a Promove sling with head support.
- **INDIVIDUAL DONATION £3,198** - Fourteen-year-old Sebastian was born with a very rare muscular neuropathy resulting in physical and mental special needs. He is wheelchair-bound and as such, is at risk of abnormal development of the hip bones. He loves cycling on a tricycle and this is important since, alongside the efforts of the physiotherapy team at his special school, this activity has prevented the need for invasive hip operations. Sebastian had outgrown his beloved tricycle and needed a new adult tricycle at the sum of £4,198 including accessories! Sebastian's family had raised a deposit and so we funded the extra £3,198 required.
- **INDIVIDUAL DONATION £330** - It was our pleasure to donate £330 to buy a large, comfortable bean bag and a projector showing lights and patterns, for Ella who is affected by Sanfilippo syndrome and had sadly deteriorated. This syndrome is a rare genetic disease that mainly affects the brain and spinal cord. The central nervous system becomes damaged along with other organ systems and tragically, the symptoms manifest themselves as progressive intellectual disability, hyperactivity, loss of mobility and dementia. Lifespan is reduced in most cases to the early teenage years though potentially some sufferers may reach their 30s.
- **INDIVIDUAL DONATION £378** - This funding was requested by Julia's House Family Support. On this occasion, the funds were required to buy accessories for a wheelchair supplied by the NHS Wheelchair service but with no allowance for the accessories. The chair is essential in the daily life of a 7-year-old girl with a genetic condition, epilepsy, atrial heart condition, hypotonia and hip displacement. She is non-verbal and non-mobile, and the chair at least means her family are able to leave their home. Our funding for a canopy and a rain cover importantly allows use of the wheelchair in all weathers.

Fundraising

The above donations made by the Foundation have been funded through numerous fundraising activities and donations made. The Trustees want to put on record how grateful we are to everybody who has donated, undertaken fundraising activities or helped the Foundation in any way. We are so grateful to those people who remain loyal friends of the Foundation and whose enthusiasm and commitment helps Louis's Foundation to achieve its aims and make real differences to those experiencing difficulty who are unable to help themselves. It is so touching that in remembrance of Louis, acts of kindness and positivity are carried out.

In total **£13,520** has been raised in fundraising activities. This is up on last year (£10,346).

Please note that the figure only reflects monies received within the financial year and will not include money raised by activities towards the year end, as money from these events will not have been received within the financial year:

JUNE 2024

ST MARY'S CHURCH FETE

We were pleased to have the opportunity of holding a Tombola Stall at St Mary's Church Fete in Sturminster Marshall on June 15, 2024 Thank you to everyone who supported us by donating prizes or stopping at our stall! A lovely, community-based event in a place that means a great deal to our family. £111.50 was raised!

JULY 2024

CREAM TEAS AT HOME AFTERNOON

A huge thank you to everyone who supported our Cream Teas event on July 27th. We're so grateful to those who came along, who sent a donation, donated raffle prizes or just spread the word! Especially grateful for all the hard work from family and friends manning the kitchen and coping with the chaos! £1,170 was raised for the Foundation.

SEPTEMBER 2024

MIX AND MINGLE CAKE SALE

On September 19th we were pleased to be included in Tarrant Keyneston's monthly Mix and Mingle gathering, with the opportunity to sell cakes and other goods. We raised a fabulous £310.60.

YEOVIL METAL DETECTORISTS' RALLY

This event was held on September 29th in our own village – indeed in the fields behind our home in Tarrant Keyneston. We're so grateful to Owen Sully, a member of the club and a villager, for putting Louis's Foundation forward to receive funding.

The Club reported "On Saturday September 29th, the Yeovil Metal Detecting Club held a rally to raise money for local causes. A great day was had by all, the weather held and the club donated £370 to the Foundation."

OCTOBER 2024

CORFE MULLEN CARNIVAL CHEQUE PRESENTATION

We are so grateful to Corfe Mullen Carnival Committee for the sum of £1,145 received by us at their celebration evening on October 5th. We know how much hard work went into the 2024 Carnival and we really appreciate being one of the recipient charities. We must also say a special thank you to our friend Andre Labouchardiere for representing us at various Carnival events and for all his support.

STURMINSTER MARSHALL QUIZ NIGHT

On October 26th, we were so fortunate to host another great Quiz Night with John Jocham at the helm of quizzing and entertaining! The Memorial Hall was full and the Sturminster Marshall community did not disappoint with their support! Thank you so much to John and his trusty assistant Alan Ephgrave, to all who attended and bought raffle tickets and cake and to friends who helped-out! A good result for the Foundation with £830 raised!

NOVEMBER 2024

TARRANT VALLEY PLAYERS CHEQUE PRESENTATION

Thank you so much to The Tarrant Valley Players for presenting us with a cheque for £1,000 – funds raised from their Pantomime earlier in the year and related Quiz Night. We were so touched to be supported by this local community group and thrilled to receive such a generous amount! The cheque was presented by Tarrant Keyneston villager and VIP in the TVP, Mandy Tuite. Thank you all so much!

MARCH 2025

LANCASTER HOUSE MUSIC CONCERT

We were incredibly touched that Lancaster House at Canford School chose to dedicate their House Music Concert on March 10th to Louis's Foundation, in terms of raising funds. Louis had been a member of Lancaster House for 3 years and so our allegiance felt strong – it was lovely, however, that the event introduced Louis's Foundation to Mr James Leigh who was in his first year as Housemaster and Canford teacher. The evening was tremendously enjoyable, tinged with emotion of course, and demonstrated both bravery and talent mixed with the ability to have fun! An amazing £1,355 was raised and we sincerely thank Mr Leigh and every member of the Lancaster community. To retain a link with Louis's school means a great deal.

APRIL 2025

BLANDFORD DARTS ROUND ROBIN RAFFLE

For the third year in a row, we were absolutely delighted when Sarah Thompson and Dennis Crane kindly offered to raise funds for Louis's Foundation with a large-scale raffle at Dennis's event. This now-annual event is a major Darts' tournament involving 64 players and is incredibly popular. The effort Sarah puts into organising the raffle is tremendous and we are so very grateful to Sarah, Dennis, the donors of the generous prizes and to everyone who helped Sarah or bought tickets. A very impressive £1,375 was raised and we could not be more grateful!

MAY 2025

TARRANT KEYNESTON QUIZ NIGHT

We were fortunate on May 3rd, to have the efforts and expertise of brilliant Quiz Master Mike Sandford! He generously gave his time and delivered an entertaining Quiz; the village hall at Tarrant Keyneston was full and everyone enjoyed the evening.

There was generous support for the Raffle and Cake Stall too and £845 was raised! A huge vote of thanks to Mike, his scorer Elsie, friends who helped on the evening and everyone who came along.

Donations to the Foundation

During this year, the Foundation received over **£6,064** in donations for which we are incredibly grateful.

We are so grateful to family, friends and supporters of the work of Louis's Foundation for the donations we receive during a year. Sometimes these are to mark Louis's Birthday on September 8th and Christmas, sometimes as a gesture passing on good fortune and sometimes 'just because'. This year we received donations in lieu of wedding gifts from guests at Hannah and Andy's marriage – a truly wonderful and generous gesture for which we are extremely grateful. Also, we continue to receive a generous donation from the Furber family, passing on a share of their son's scholarship funding from Canford.

Additionally, this year we successfully applied for Gift Aid and received a total of **£5,138 back from HMRC**. This reflects cash donations received by the Foundation over a three-year period.

Financial Review

Brief Statement of the Charity's Policy on Reserves

Gross receipts in the year were up **by 35.43% from £18,346 to £24,781**. This is mainly due to an uptick in donations of £3,220 (£6,064 in 24/25 to £2,844 in 23/24) and an increase of £3,174 in fundraising activities. Although the Foundation received substantial additional funds this year through Gift Aid - £5,138, this increase has been largely offset by the return of the £5,000 deposit after the cancellation of the Louis Ross Festival in last year's accounting period.

Expenses the year were £23,429 which is lowest expense figure in 5 years and in line with previous years where no major fundraising event was undertaken. See below table:

Income/Exps.	01/06/2020	01/06/2021	01/06/2022	01/06/2023	01/06/2024	01/06/2025
Total Gross Income	£26.51k	£25.22k	£47.70k	£30.66k	£18.35k	£24.7k
Total Gross Exps **	£19.15k	£25.95k	£33.17k	£37.42k	£26.74k	£23.4k

** this figure includes grants awarded

This year the Foundation were pleased to have made a total of **£22,481 in grants** to the organisations mentioned in this report. This represents a **slight increase of 2.8%** from £21,865 in 2024 to £22,481 this year. Extracting the grants donated in the year from overall gross expenses, highlights that a very positive **96% of all outgoings in the year were in the form of direct awards** to our grant applicants. This is significantly up on previous years and reflects not only a reduction of marketing expenses in the year but a **drive to keep costs low and ensure that monies raised and donated are directly donated to worthy causes.**

Non-grant related expenditure has decreased from £4,833 in 2024 to £948 this year. This reflects a significant reduction in expenses associated with Fundraising and Marketing activities. Only, £77 has been spent on direct administration costs (bank charges). However, insurance costs have not been reflected in this year's accounts as the payment of these did not come from the Foundation account. The cost of £154 will be reflected in next year's accounts.

Cash at Bank has increased by £1,352 at £71,909. All funds are unrestricted. It is the intention of the Foundation to maintain sufficient funds to (i) help source future fundraising activities and (ii) maintain a consistent monetary level of grants awarded in any year. This gives us the ability to 'absorb' any deficit in overall receipts. It is the intention of the foundation to 'reduce' the bank balance to circa £50k over the next years by allocating additional grants.

Details of Any Funds Materially in Deficit

Not Applicable

Statutory Notes to the Accounts

Particulars of Any Outstanding Guarantee Given by the CIO

None

Particulars of Any Outstanding Debt

None

Declaration

The Trustees declare that they have approved the Trustees' Report above.

Signed on behalf of the Charity's Trustees

Signature(s): *John M Ross* *Penny A. Ross*

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Full Name(s):	John M Ross	Penny A Ross
Position(s):	Treasurer	Chair of Trustees
Date:	March 30, 2026	March 30, 2026



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Louis Ross Foundation

1168723

Receipts and payments accounts

For the period from

Period start date
June 2, 2024

To

Period end date
June 1, 2025

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
Receipts					
Activity in period 02/06/24 to 01/06/25					
Donations in Year	6 064	-	-	6 064	2 844
Fundraising in Year	13 520	-	-	13 520	10 346
Merchandise Sales	59	-	-	59	-
Deposit from Louis Ross Festival	-	-	-	-	5 000
Trf from PayPal Account	-	-	-	-	156
Gift Aid	5 138	-	-	5 138	-
Sub total (Gross income for AR)	24 781	-	-	24 781	18 346

Asset and investment sales, (see table).	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	24 781	-	-	24 781	18 346

Payments

Activity in period 02/06/24 to 01/06/25	-	-	-	-	-
Grants & Donations made	22 481	-	-	22 481	21 865
Fundraising & Advertising	230	-	-	230	3 370
Marketing	641	-	-	641	1 103
Merchandise	-	-	-	-	-
PayPal Trf to HSBC Account	-	-	-	-	155
Trustee Insurance	-	-	-	-	151
Bank & Trx Fees	77	-	-	77	104
Sub total	23 429	-	-	23 429	26 748

A4 Asset and investment purchases, (see table)	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	23 429	-	-	23 429	37 423

Net of receipts/(payments)	1 352	-	-	1 352	- 6 760
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	70 557	-	-	70 557	78 960
Cash funds this year end	71 909	-	-	71 909	72 200

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	HSBC @ 01/06/25	71 909	-	-
	PayPal @ 01/06/25	-	-	-
	SumUp @ 01/06/25	-	-	-
	Total cash funds	71 909	-	-
(agree balances with receipts and payments account(s))				
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	-
			-	-
			-	-
			-	-

Signed by one or two trustees on behalf of all the trustees

Signature

Print Name

Date of approval

John M Ross

John M Ross

20/03/2026