

Phoenix Lifestyle Foundation (Charity Number 1186727)

Trustees' Annual Report for the period 24 December 2023 to 24 December 2024

The trustees, Clayton (Chair), Hannah Williams, and CEO Lewis Baker, are pleased to present their annual report for the period ending 24 December 2024. The trustees are responsible for the governance of the charity and ensuring its effective operation in pursuit of its charitable aims.

The Charity's primary objective is to relieve the needs of individuals experiencing mental health challenges and those in recovery from drug and alcohol addiction. This is achieved through the provision of facilities for training, mentoring, and group exercise, all designed to improve their quality of life and promote and protect their physical and mental well-being. During this reporting period, our focus has been on establishing a strong foundation for the charity and successfully launching two key projects that directly address our core objectives.

Objectives and Activities

For the period under review, the charity's principal objectives were:

- * To establish a well-structured and effective board of trustees and robust operational procedures for the charity.
- * To successfully launch and deliver two pilot projects: "Wellness Warriors on the Run," a sober running group, and "Brothers in Arms," a men's exercise and social club.

Review of Activities

Wellness Warriors on the Run:

This initiative represents the first dedicated sober running club in the South of the UK, inspired by the lived experience of our CEO, Lewis Baker, and the well-documented positive physiological impact of exercise on the brain. The program brings individuals in recovery together under the guidance of coaches with lived experience of overcoming addiction. By meeting three times a week for outdoor exercise, the project provides a vital peer support network and demonstrates the possibility of recovery through relatable role models. The outdoor setting is known to benefit mental health, and exercise releases endorphins, contributing to improved mood. The consistent meeting schedule helps to maintain engagement and reduce the likelihood of harmful behaviours.

The program follows the NHS "Couch to 5k" framework, ensuring a safe and progressive approach to building fitness. Upon completion of the nine-week program, participants are offered the opportunity to participate in an official race, providing a tangible sense of achievement and the reward of a medal.

"Wellness Warriors on the Run" is a collaborative project with Bucks New University's Community Engagement Team, who secured funding from Sport England. These funds, held and managed by Bucks New University, were specifically allocated for runners' t-shirts, race entry fees, and head torches for winter sessions. While these funds are not reflected in the charity's direct accounts, we maintain transparent communication with Bucks New University and can provide their financial records related to this project if the Commission deems it necessary. We are committed to adhering to best practice in financial reporting and welcome guidance on how to best represent collaborative funding arrangements in future reports.

Brothers in Arms:

This men's group was established to create a supportive environment where men can connect and improve their well-being. Recognising the potential reluctance of men to engage with traditional mental health services, the group is marketed as a fitness and social club, using exercise as a catalyst for increased sociability and openness.

The first meeting was held in the week preceding Christmas 2024, a period often associated with heightened emotional challenges. Weekly 1.5-hour sessions are held at a local village hall, which was secured free of charge for an initial three-month period. Fundraising and sponsorship efforts are underway to cover future hall rental costs. Initial interest from local businesses, such as builders' merchants, in providing sponsorship has been encouraging.

Mirroring the successful model of "Wellness Warriors," a committee will be established within "Brothers in Arms" to ensure the club's activities are tailored to the specific needs and interests of its members, fostering a sense of ownership. The Phoenix Lifestyle Foundation trustees will retain overall strategic control.

The intended outcomes of "Brothers in Arms" include: peer support among members, a safe and non-stigmatising space for men to connect, improvements in physical and mental health, engagement in community projects, and a welcoming atmosphere where participants feel they belong. In line with our governing document, leaders within the group will have lived experience of mental health challenges, although they may not be professionally qualified counsellors. The group's focus is on support and connection, and while we can provide signposting to professional counselling services, we do not offer direct counselling within this project.

Achievements and Performance

Wellness Warriors on the Run:

The "Wellness Warriors on the Run" project has significantly exceeded initial expectations in its first year. Achieving affiliation with England Athletics and establishing

a well-functioning committee with qualified running leaders and safeguarding officers demonstrates a strong commitment to quality and safety.

A particularly impactful success story is that of a participant in the first wave who achieved sobriety on his first day with the group after 27 years of addiction and remains sober at the time of writing (1.5 years later). The program has consistently maintained an average engagement rate of 80% of enrolled runners completing the nine-week program.

Feedback from participants has been overwhelmingly positive, with many reporting weight loss, lower blood pressure, and, crucially, significant improvements in their mental well-being and overall happiness. Participants have also reported increased sober days and a greater sense of hope for long-term recovery.

The project has fostered a strong sense of community and belonging, with participants actively engaging in a supportive WhatsApp group, organising social activities, and beginning to participate in local community events.

Brothers in Arms:

As this project was launched in the final week of the reporting period, there are no significant performance outcomes to report at this time. However, the initial response and engagement have been encouraging, indicating a potential for positive impact in the future.

Overall, despite being a relatively new and small charity, the Phoenix Lifestyle Foundation has made significant progress in achieving its objectives and has begun to create a positive impact within the community. The successful launch and positive outcomes of the "Wellness Warriors on the Run" project provide a solid foundation for future growth and development.

Financial Review

At the end of the reporting period, the charity held a balance of £906 in its bank account. This represents the unrestricted funds available to support the ongoing activities and future development of the charity. As a small organisation, we are committed to prudent financial management and are actively pursuing additional funding opportunities to ensure the sustainability and expansion of our projects. All expenditure during this period was directly related to the establishment and delivery of the two launched projects.

Structure, Governance, and Management

The Phoenix Lifestyle Foundation is a Charitable Incorporated Organisation (CIO) governed by its constitution. Our charitable objects, as registered with the Charity Commission, are to relieve the needs of individuals experiencing mental health

challenges and those recovering from drug and alcohol addiction by providing facilities for training, mentoring, and group exercise designed to improve their conditions of life and promote and protect their physical and mental health.

The trustees are responsible for the overall governance, strategic direction, and legal compliance of the charity. The CEO is responsible for the day-to-day management and operational delivery of the charity's activities, currently including the direct delivery of projects and sessions.

During this reporting period, the trustees held formal meetings three times and conducted bi-weekly informal check-in meetings. As the charity grows, the intention is to increase the frequency of formal board meetings to monthly, while maintaining weekly check-ins.

The charity plans to welcome new trustees to the board in December 2024. The appointment process involves individuals registering their interest with the CEO or existing trustees. Potential candidates are then discussed at a subsequent board meeting, and appointments are made by a majority vote of the current trustees.

The trustees acknowledge that the past year has presented some operational challenges, particularly regarding administrative processes and trustee capacity. The departure of a trustee residing overseas, who remained a bank account signatory, temporarily restricted access to the charity's funds. Additionally, the appointment of a trustee to handle administrative tasks did not yield the anticipated outcomes due to unforeseen health issues. These challenges regrettably contributed to the late submission of this report, the lack of a gift aid scheme, and the absence of a website.

The trustees offer their unreserved apologies to the Charity Commission for the delayed submission and acknowledge the importance of timely reporting and robust administrative systems. Lessons have been learned from these experiences, and proactive steps are being taken, including the recruitment of new trustees and the implementation of clearer administrative responsibilities, to prevent recurrence and ensure more efficient operations moving forward.

Declaration

The trustees confirm that they have approved this report and are satisfied that it provides a fair and accurate representation of the Phoenix Lifestyle Foundation's activities and financial position during the reporting period.

Charmain Clayton (Chair of Trustees) *Charmain Clayton*

Hannah Williams (Trustee) *Hannah Williams*

Lewis Baker (Trustee/CEO) *Lewis Baker*

Date: 01/05/2025