



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 01	Month 01	Year 2022		Day 31	Month 12	Year 2022

Section A Reference and administration details

Charity name The Phoenix Coaching Trust

Other names charity is known by

Registered charity number (if any) 1187716

Charity's principal address 9 Chelmer Close
Bedford

Postcode MK41 7YD

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Chloe Jessop	Fundraiser/Tresurer		
2	Susan Jessop	Chairman/Treasurer		
3	Katie Jessop	Secretary	From 17/08/2023	
4	Elizabeth Stevenson	Treasurer	01/01/2022 - 14/06/2022	
5	Catherine Ripley	Secretary	01/01/2022 - 14/06/2022	
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

	Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Susan Jessop, Clerk to the Trustees

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Foundation Model Constitution of CIO
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- ☐ policies and procedures adopted for the induction and training of trustees;
- ☐ the charity's organisational structure and any wider network with which the charity works;
- ☐ relationship with any related parties;
- ☐ trustees' consideration of major risks and the system and procedures to manage them.

Summary of the objects of the charity set out in its governing document

The objects of the CIO are:

- (1) To act as a resource for young people living particularly but not exclusively in Bedfordshire, by providing advice and assistance, and organising programmes of physical, educational and other activities as a means of:
 - (a) Advancing in life and helping young people by developing their skills, capacities and capabilities to enable them to participate in society as independent, mature and responsible individuals;
 - (b) Advancing education;
 - (c) Relieving unemployment
- (2) To develop the capacity and skills of the socially and economically disadvantaged living in Bedfordshire but not exclusively, in such a way that they are better able to identify, and help meet, their needs and to participate more fully in society.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Despite COVID-19 restrictions being lifted, this has continued to have an impact on facilitating courses and fundraising.

As a relatively new charity we are still establishing ourselves and ensuring all policies and procedures are in place. In the last year, the charity has seen a change in trustees and appointment of a new trustee. This has had an impact on the charity and enforced a change in roles within the structure of the charity.

Two courses have been facilitated with The Kings Arms Project, Bedford.

These were Goal Mapping coaching courses and ran weekly once a week for 8 weeks with a ninth as regroup day. These courses benefitted the socially disadvantaged who are trying to reintegrate into society as independent, mature and responsible individuals giving them a support network and tools to manage this reintegration as per our objectives.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- ☐ policy on grant making.
- ☐ policy programme related investment;
- ☐ contribution made by volunteers.

Section D

Achievements and performance

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The Phoenix Ball (which was initially due to take place 28th March 2020 but was postponed due to COVID-19) took place on 26 March 2022.

The purpose of this event was to officially launch the charity and signpost the public to our purpose. It was a great success, and we raised a significant amount of funds for us to utilise for grant making.

Via our fundraising activities we are now set up to provide the proven delivery method for the charities purpose. Our fundraising methods are established, and we have created connections that can deliver our charities core purpose. We continue to network and build connections locally.

Section E

Financial review

Brief statement of the charity's policy on reserves

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- ☐ the charity's principal sources of funds (including any fundraising);
- ☐ how expenditure has supported the key objectives of the charity;
- ☐ investment policy and objectives including any ethical investment policy adopted.

Section F Other optional information

Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s)	S Jessop	
Full name(s)	Susan Jane Jessop	
Position (eg Secretary, Chair, etc)	Chair	
Date	02/06/2023	



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Phoenix Coaching Trust

1187716

Receipts and payments accounts

For the period from	Period start date 1/1/2022	To	Period end date 12/31/2022
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £
A1 Receipts				
Donations	975	-	-	975
Ball Funds	6,226	-	-	6,226
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
Sub total (Gross income for AR)	7,201	-	-	7,201
A2 Asset and investment sales, (see table).				
	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total receipts	7,201	-	-	7,201
A3 Payments				
Expenses	219	-	-	219
Ball Expenses	8,537	-	-	8,537
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
Sub total	8,756	-	-	8,756
A4 Asset and investment purchases, (see table)				
	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total payments	8,756	-	-	8,756
Net of receipts/(payments)	- 1,555	-	-	- 1,555
A5 Transfers between funds	-	-	-	-
A6 Cash funds last year end	22,643	-	-	22,643
Cash funds this year end	21,088	-	-	21,088

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
B1 Cash funds			-
		-	-
		-	-
	Total cash funds	21,088	-
	(agree balances with receipts and payments account(s))	OK	OK
B2 Other monetary assets		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
B3 Investment assets			-
			-
			-
			-
			-
B4 Assets retained for the charity's own use			-
			-
			-
			-
			-
			-
			-
			-
			-
B5 Liabilities			-
			-
			-
			-
			-

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name
	S Jessop	Susan Jessop

CC16a



Last year
to the nearest £

3,405
-
-
-
-
-
-
-
3,405

-
-

3,405

3,675
-
-
-
-
-
-
-
-
3,675

-

3,675

-	270
-	
-	
-	270



**Endowment
funds**

to nearest £

-
-
-
-

OK

**Endowment
funds**

to nearest £

-
-
-
-
-
-

**Current value
(optional)**

-
-
-
-
-

**Current value
(optional)**

-
-
-
-
-
-
-
-
-

**When due
(optional)**

Date of
approval

1/15/2023