



# Trustees' Annual Report for the period

|      |                   |             |              |    |                 |             |              |
|------|-------------------|-------------|--------------|----|-----------------|-------------|--------------|
| From | Period start date |             |              | To | Period end date |             |              |
|      | Day<br>01         | Month<br>01 | Year<br>2023 |    | Day<br>31       | Month<br>12 | Year<br>2023 |

## 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<br>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/Treasurer |                                   |                                                               |
| 2  | Susan Jessop | Chairman/Treasurer   |                                   |                                                               |
| 3  | Katie Jessop | Secretary            | From 17/08/2022                   |                                                               |
| 4  |              |                      |                                   |                                                               |
| 5  |              |                      |                                   |                                                               |
| 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.

## Section C Objectives and activities

### 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.

As a relatively new charity we continue to establish ourselves and ensure all policies and procedures are in place and up to date.

Due to the resignation of 2 trustees last year, a reduction in availability of voluntary support this year due to work commitments, the charity has been limited in their activity.

However, we have forged connections with The Recovery Coach Academy to provide sponsorship for clients to provide funding for 1:1 coaching for their client groups.

We have continued our support with The Kings Arms Project and have made connections with them to sponsor part of their third iteration of The ReVerb Project which is planned for 2024. This encourages those who may be at risk of being unheard to feel they have something to say that others will listen to - their voice matters. This also allows opportunities to support good mental health among those who may struggle to connect with groups and communities and help them feel they are part of a common goal

**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)**

**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

During this year we have had a danceathon raising significant funds for us to utilise for grant making.  
We were also the nominated charity for wedding gift donations - we thank the happy couple for this greatly.  
We have been nominated as the designated charity for Mercury Lodge, the local branch of Freemasonry.

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**

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|  |
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**Details of any funds materially in deficit**

|  |
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|  |
|--|

**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.

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## Section F

## Other optional information

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|  |
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## Section G

## Declaration

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

**Signed on behalf of the charity's trustees**

|                                            |                   |  |
|--------------------------------------------|-------------------|--|
| <b>Signature(s)</b>                        | S Jessop          |  |
| <b>Full name(s)</b>                        | Susan Jane Jessop |  |
| <b>Position (eg Secretary, Chair, etc)</b> | Chair             |  |
| <b>Date</b>                                | 24/04/2024        |  |



CHARITY COMMISSION  
FOR ENGLAND AND WALES

The Phoenix Coaching Trust

1187716

## Receipts and payments accounts

CC16a

For the period  
from

Period start date  
1/1/2023

To

Period end date  
12/31/2023

### 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 £ |
| <b>A1 Receipts</b>                                    |                    |                  |                  |                  |                  |
| Donations                                             | 476                | -                | -                | 476              | 975              |
| Fundraising                                           | 6,407              | -                | -                | 6,407            | 6,226            |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
| <b>Sub total</b> (Gross income for AR)                | 6,883              | -                | -                | 6,883            | 7,201            |
| <b>A2 Asset and investment sales, (see table).</b>    |                    |                  |                  |                  |                  |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
| <b>Sub total</b>                                      | -                  | -                | -                | -                | -                |
| <b>Total receipts</b>                                 | 6,883              | -                | -                | 6,883            | 7,201            |
| <b>A3 Payments</b>                                    |                    |                  |                  |                  |                  |
| Expenses                                              | 602                | -                | -                | 602              | 219              |
|                                                       | -                  | -                | -                | -                | 8,537            |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
| <b>Sub total</b>                                      | 602                | -                | -                | 602              | 8,756            |
| <b>A4 Asset and investment purchases, (see table)</b> |                    |                  |                  |                  |                  |
|                                                       | -                  | -                | -                | -                | -                |
|                                                       | -                  | -                | -                | -                | -                |
| <b>Sub total</b>                                      | -                  | -                | -                | -                | -                |
| <b>Total payments</b>                                 | 602                | -                | -                | 602              | 8,756            |
| <b>Net of receipts/(payments)</b>                     | 6,281              | -                | -                | 6,281            | - 1,555          |
| <b>A5 Transfers between funds</b>                     | -                  | -                | -                | -                | -                |
| <b>A6 Cash funds last year end</b>                    | 21,088             | -                | -                | 21,088           | -                |
| <b>Cash funds this year end</b>                       | 27,369             | -                | -                | 27,369           | - 1,555          |

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

| Categories                                                  | Details                                                | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|-------------------------------------------------------------|--------------------------------------------------------|------------------------------------|----------------------------------|---------------------------------|
| B1 Cash funds                                               |                                                        |                                    | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             | <b>Total cash funds</b>                                | <b>27,369</b>                      | <b>-</b>                         | <b>-</b>                        |
|                                                             | (agree balances with receipts and payments account(s)) | OK                                 | OK                               | OK                              |
| B2 Other monetary assets                                    | Details                                                | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>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                 |                                 |
|                                                             | S Jessop                                               | Susan Jessop                       | 1/24/2023                        |                                 |
|                                                             |                                                        |                                    |                                  |                                 |