



Charity Registration No.1190534

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# **Trustee Annual Report**

## **21<sup>st</sup> April 2023- 20<sup>th</sup> April 2024**

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## Executive Summary

Wonderful Life Academy is a Charitable Incorporated Organisation registered with the Charity Commission and recognised as charitable by HMRC. The Objects as set out in Wonderful Life Academy's governing document are:

To preserve and protect the health and wellbeing of, in particular but not exclusively, frontline workers in the United Kingdom by providing workshops and coaching sessions with Well-Being Coaches and providing access to on-line content designed to promote healthy lifestyle and well-being.

Our mission is ***"To help as many people as possible improve their lives through focussing on well-being. We provide coaching to help them to look after their Physical, Mental, Emotional and Spiritual well being and in doing so create their own Wonderful Life."***

Since its foundation in 2020, Wonderful Life Academy has helped Frontline workers in the Fire Brigade, the Greater Manchester Police, the NHS, Morrisons Supermarkets, Nationwide Building society, Social Workers and Nurseries to improve the Well-Being of their staff.

Since the beginning of 2022, Wonderful Life Academy has offered our service free to everyone, running wellbeing workshops in schools, community centers and social clubs. We continued to prioritise Key workers including care workers, teachers and postal workers.

Wonderful Life Academy's governance structure consists of four Trustees: Timothy Laycock, Ella Gowing, Mitchell Gowing and Lucy Gale and its Chief Executive Officer Neil Gowing. Full Board meetings are held annually. Trustee meetings are held quarterly with a minimum of two trustees in attendance.

The Charity has a number of key strengths. All our fully qualified Coaches are accredited by the largest coaching organisation in the world. All of our coaching content belongs to the Charity and is licence free. The CEO has over 30 years Leadership and business experience.

The Trustees have a plethora of experience including Greater Manchester Police, Mental Health First Aid, Management and Leadership, Logistics, Business Directors, Training and Development, Retail, Hospitality, Human Resources and CIPD.

The need for Well-Being coaching is highlighted in the department of Health's recent paper on well-Being as being at an all time high thus creating a significant opportunity for our charity to flourish and benefit the maximum number of people.

Wonderful Life Academy has a three-stage business strategy,

1. To obtain grants from relevant organisations to continue to deliver workshops to Key workers, communities and specialist groups.
2. Seek opportunities to work collaboratively with organisations to provide our service to and to receive funding/fundraising support from.
3. Operate a Charity shop which includes a wellbeing hub.

The Charity's funding strategy follows three main workstreams; local fundraising, funding grants and Charity shop.

We have a clear set of objectives geared towards achievement of our business plan with reviews of all strategy, activities and procedures planned within the financial year.

All Strategic risks have been assessed and measures put in place to mitigate those risks.

**The business plan has been assessed and agreed by our Board of Trustees to ensure compliance with our obligations under our Charity Constitution.**

## Legal and Charitable Status

Wonderful Life Academy is:

- A Charitable Incorporated Organisation
- A registered charity recognised as charitable by HMRC

## Objects and Area of Benefit

The Objects as set out in Wonderful Life Academy's governing document are:

To preserve and protect the health and wellbeing of, in particular but not exclusively, frontline workers in the United Kingdom by providing workshops and coaching sessions with Well-Being Coaches and providing access to on-line content designed to promote healthy lifestyle and well-being.

The Area of Benefit as set out in Wonderful Life Academy's governing document and registered with the Charity Commission are:

To improve the health and Well-Being of Frontline workers in the United Kingdom. These workers are the key individuals who keep the country operational in times of crisis or public emergency. By improving the health and Well-Being of these workers they will in turn provide an improved service to the general public on a daily basis and also be more resilient in times of crisis thus maintaining a higher level of attendance and service in such times.

## Mission Statement

***Our mission is to help as many people as possible improve their lives through focussing on well-being. We provide coaching to help them to look after their Physical, Mental, Emotional and Spiritual well being and in doing so create their own Wonderful Life.***

# Statement of Values

Wonderful Life Academy believes strongly in:

The right of everyone to enjoy a life of their own.

The right of Frontline and Key workers to expect effective support in their valued role.

The importance of a safe environment where people can share personal experiences with honesty and acceptance.

Wonderful Life Academy sees itself as:

Caring and respecting people's individuality.

Promoting the importance of well-being to overall health.

Enabling and empowering people to take action.

Maintaining people's confidentiality (subject to safeguarding issues).

Valuing Frontline and Key workers and their contribution to society.

Non-condemnatory, judging situations not people.

Independent of statutory services.

Seeking and gaining the respect of professional colleagues.

Working consultatively and collaboratively.

Open and communicative.

Knowledgeable, with a "can-do" approach to improving well-being.

# Summary of Achievements to Date

Since its foundation in 2020, Wonderful Life Academy has already:

- Helped members of the Emergency services to improve their Well-Being through group coaching sessions.
- Helped Frontline workers within the NHS improve their Well-Being through online content and activities.
- Helped members of Royal Mail to improve their Well-being through providing access to their online content.
- Worked with Nurseries to improve the Well-Being of their staff through online group sessions.
- Worked with Accent Housing Association to improve the Well-Being of their entire team.
- Worked in collaboration with Morrisons and Asda Supermarkets to run Well-Being groups for their Key workers.
- Held online well-being sessions for the Morrisons head office team as part of their corporate Mental Health Awareness week.
- Held face to face well-being sessions with 'Men's Den' in Burnley.
- Held face to face sessions with The Prince's Trust for groups of teenagers.
- Provided wellbeing workshops for Healthier Heroes Veterans groups.
- Provided whole school community workshops for parents, teachers, support staff etc.
- Provided wellbeing workshops for staff at Care homes across Lancashire
- Held community wellbeing workshops across Lancashire and Greater Manchester.
- Organised wellbeing walks for local communities across Lancashire.
- Worked with Haven Holidays to provide support for their wellbeing champions.
- Provided wellbeing workshops for members of the faculty at Manchester University.
- Provided Wellbeing workshops and wellbeing walks in collaboration with The Enterprise center and other local charities.
- Worked with Onward Housing to deliver wellbeing workshops to those impacted by the cost of living crisis.

## Vision of Success

In 2023/24 Wonderful Life Academy:

- Operated across Greater Manchester and Lancashire with 3 qualified coaches.
- Offered face to face group coaching to all registered beneficiaries.
- Made Wellbeing workshops available free to everyone.
- Made Wellbeing Walks available free to everyone.

## Aims

The strategic aims of Wonderful life academy are:

To enable Frontline and Key Workers, workers in other organisations and members of our communities to manage their well-being and own lives more easily and more effectively, and to pursue their own goals and aspirations.

To enable Frontline and Key workers, workers in other organisations and members of our communities to support each other in their well-being.

To empower all members of our communities to take control of their own wellbeing and mental health and improve their resilience to mental illness.



## Equality Statement

Wonderful Life Academy is committed to equal opportunities principles in:

- designing and delivering its services;
- recruiting and developing its paid staff and volunteers;
- recruiting and developing its Board membership.

This commitment is set out in full in our Equal Opportunities Policy.

## Governance

Wonderful Life Academy's governance structure is as follows:

4 Trustees -

Timothy Laycock - Director at M66 Car and Commercial.

Lucy Gale- Crime Recording officer, Greater Manchester Police.

Ella Gowing – Restaurant Manager, Swan & Cemetery Restaurant

Mitchell Gowing – Dispatch controller, Greater Manchester Police.

Chief Executive Officer- Neil Gowing

Full Board meetings are held annually. Trustee meetings are held quarterly with a minimum of two trustees in attendance.

# Situation Analysis

## Strengths:

Led by fully qualified Coaches accredited by The largest Coaching Organisation in the world.

All content belongs to the Charity and is licence free.

Website is functioning and fit for purpose.

Network of qualified coaches already in place.

CEO has 30 years Leadership and business experience.

Trustees bring a plethora of experience including Mental Health First Aid, Management and Leadership, Logistics, Greater Manchester Police, Business Directors, Retail, Hospitality, Training and Development, Human Resources and CIPD.

Well-Being remains topical following the Covid-19 Pandemic and the Cost of living crisis.

Content and format are tried and tested with excellent reviews and feedback.

No other Charity or Coaching organisation has the same content.

We are able to operate both online and in person allowing us to be flexible to the needs of our beneficiaries.

The Charity is largely self-funded via the Charity shop.

## Weaknesses:

All of our fully trained Well-Being Coaches are based in the North West of England thus limiting our reach.

The website has limitations due to lack of expert knowledge within the Charity.

The administration and day to day function of the charity is reliant solely on the CEO.

Our Brand awareness is low outside of home towns.

## Opportunities

We are eligible to apply for funding from National Lottery, People's Postcode lottery and numerous other funding bodies.

Partnership with The Blue Light Card Foundation can bring publicity, credibility and fundraising opportunities.

Partnership with Morrisons, Asda and Tesco Supermarkets can bring publicity, credibility and fundraising opportunities.

Partnership with Greater Manchester Police can bring publicity, credibility and fundraising opportunities.

Tap into Retail contacts including Team members as source of volunteers and fundraisers.

Development of website to create a more accessible online coaching service.

Continuing to grow the Charity Shop can bring additional funding and self reliance.

### Threats

The Current climate has made funding and fundraising more difficult with many charities finding it difficult to survive.

People don't see the value of coaching so not seen as essential.

Loss of coaches due to other commitments

Not able to pay CEO and coaches.

Potential loss of Trustees due to other commitments.

Risk of lease on Charity shop being ended early due to town center development.

# Business Strategy

Wonderful Life Academy has a three-stage business strategy.

- Obtain grants to continue to provide workshops to both Frontline and non-frontline workers, to communities and to specialist groups.
- Seek opportunities to work collaboratively with organisations to provide our service to and to receive funding/fundraising support from.
- Operate a Charity shop including a wellbeing hub.

Key priority areas are:

Expand our reach to more Beneficiaries

- Utilise existing contacts to further build relationships with Morrisons, Asda, NHS, Greater Manchester Police and Bury College.
- Build on relationships with schools, councils, NHS trusts and community centers to reach new beneficiaries.
- Promote the Wonderful Life Academy Brand more widely through Social Media and through the Charity Website.

Operation of Charity shop and wellbeing hub

- Operate of a Charity shop in town center location.
- Recruit and train volunteers to operate Charity Shop.
- Create a wellbeing hub that has a room to hold workshops and office space or hot desks for other wellbeing charities to use.
- Purchase a vehicle to service the charity shop with stock donations.

Team Development and knowledge

- Recruit and train another 3-5 Well-Being Coaches
- Upskill existing Coaches with ongoing development programme.
- Recruit and develop operational roles as required to expand the Charity capabilities.
- Recruit a further 2 Trustees to mitigate risk of potential resignations.

# Funding Strategy

The Charity's funding strategy follows three main workstreams.

## 1. local fundraising.

- Annual Sponsored event - The Don't Run...Marathon.
- Raffles with donated prizes.
- Requests for 'helping hands' donations from local businesses.
- Ongoing partnership with 'Grow your Mindset'.

## 2. Funding grants.

- Applications to National Lottery
- Applications to People's Postcode Lottery.
- Applications to Blue Light Card Foundation.
- Applications to other funding organisations when available.

## 3. Providing 'Paid for' coaching/speaking .

- Key note speaking at events to publise Well-Being.
- Selling Coaching book 'It's a wonderful life'.
- Creating opportunities to provide workshops for businesses in return for donations or sponsorship.

## 4, Online and bricks and mortar Charity shops.

- Donations from local communities via social media posts.
- Operation of Town Centre Charity Shop and wellbeing hub.
- Pop up charity shops at local community hubs and local markets
- Online charity shop on Ebay
- Online charity shop on Vinted
- Online charity shop on Facebook Marketplace

## Service Plan

The main services offered by Wonderful Life Academy will be as follows:

1. Face to face group Well-Being Coaching.
2. Online Academy with resources to help improve Well-Being.

### 1.Face to face group Well-Being Coaching

#### Activities

- Group coaching sessions held in workplaces, schools and communities on a weekly/fortnightly/Monthly or one-off basis.
- Structured sessions to improve each individuals Well-Being
- Takeaway exercises given to continue work between sessions
- Daily Journal utilised to track progress and share successes.
- Well-Being toolkit issued to help continue progress outside of group session.

#### Outcomes

- Improved Physical Well-Being through focussed activity
- Improved Mental Well-Being through focussed activity
- Improved Emotional Well-Being through focussed activity
- Improved Spiritual Well-Being through focussed activity
- Improved Social Well-Being through group activity and membership.
- Better work/life balance through improved Well-Being activities.
- More productive Individuals and teams due to better balance and more energy.
- Reduced absenteeism and sickness due to improved WellBeing.

#### Resources

- 3-5 Qualified Well-Being Coaches
- Members journal for each individual
- Charity Banner and Pull Up Banner
- Wonderful Life Members Pack including Dice, wheel of life, Journal
- Website with Coach resources and administration functions

## 2. Online group Well-Being Coaching

### Activities

- Group coaching sessions held online on a weekly/fortnightly or Monthly basis.
- Structured sessions to improve each individuals Well-Being
- Takeaway exercises given to continue work between sessions
- Daily Journal utilised to track progress and share successes.
- Well-Being toolkit issued to help continue progress outside of group session.

### Outcomes

- Improved Physical Well-Being through focussed activity
- Improved Mental Well-Being through focussed activity
- Improved Emotional Well-Being through focussed activity
- Improved Spiritual Well-Being through focussed activity
- Improved Social Well-Being through group membership.
- Better work/life balance through improved Well-Being activities.
- More productive Individuals and teams due to better balance and more energy.
- Reduced absenteeism and sickness due to improved WellBeing.

### Resources

- 3-5 Qualified Well-Being Coaches
- Website with Members area including Well-Being toolkit and all group materials.
- Website with Coach resources and administration functions

## 3. Online Academy with resources to help improve Well-Being

### Activities

- Provide online portal to all beneficiaries.
- Provide workplace specific online portal to each workplace.
- Provide Well-Being activities for download or use online.
- Provide group activities for download or use online
- Produce and distribute a regular newsletter with additional tools and activities to improve Well-Being.

## Outcomes

- Improved Physical Well-Being through focussed activity
- Improved Mental Well-Being through focussed activity
- Improved Emotional Well-Being through focussed activity
- Improved Spiritual Well-Being through focussed activity
- Better work/life balance through improved Well-Being activities.
- More productive Individuals and teams due to better balance and more energy.
- Reduced absenteeism and sickness due to improved WellBeing.

## Resources

- Website Domain and hosting
- Ongoing Website updates and maintenance
- Well-Being content and activities
- Website Administrator
- Website content writer



## Internal Policies and Procedures

Wonderful Life Academy will keep policies updated covering the following areas:

<b>POLICY AREA</b>	<b>Adopted</b>	<b>Action / Review</b>
<b>Safeguarding</b>	<b>Sep 2020</b>	<b>Review Sep 2024</b>
<b>Confidentiality</b>	<b>Sep 2020</b>	<b>Review Sep 2024</b>
<b>Conflict of interests</b>	<b>Sep 2020</b>	<b>Review Sep 2024</b>
<b>Health &amp; Safety</b>	<b>Sep 2020</b>	<b>Review Sep 2024</b>
<b>Equal Opportunities</b>	<b>Sep 2020</b>	<b>Review Sep 2025</b>
<b>Complaints</b>	<b>Oct 2020</b>	<b>Review Oct 2025</b>
<b>Corporate Social Responsibility</b>	<b>Oct 2020</b>	<b>Review Oct 2025</b>
<b>Recruitment</b>	<b>Oct 2020</b>	<b>Review Oct2025</b>
<b>Volunteering</b>	<b>Oct 2020</b>	<b>Review Oct 2025</b>
<b>Financial Administration</b>	<b>Oct 2020</b>	<b>Review Oct 2025</b>
<b>Code of Conduct</b>	<b>Sep 2020</b>	<b>Review Sep 2024</b>

## Staffing

The Charity currently employs the following roles:

Job Title: Chief Executive Officer

Supervised by: The Trustees

Contract : Self-Employed

Job Description:

- To oversee the day to day running of the charity.
- To report all activity to the board of trustees on a monthly basis
- To ensure all Coaching content is relevant and up to date.
- To train and develop all new coaches working for or on behalf of the charity.
- To ensure all legal requirements are met on behalf of the Trustees.
- To build and develop relationships with beneficiaries, funding bodies, fundraisers and volunteers.
- To ensure all activity is to achieve the object of the charity on behalf of the Trustees.

Job Title: Well-Being Coach

Supervised by: The Chief Executive Officer

Contract: Self Employed

Job Description:

- To provide Well-Being Coaching to groups and individuals
- To maintain the standard of coaching outlined in Wonderful Life Academy Methodology.
- To provide on line coaching via appropriate methods.
- To support fundraising activities as required.

The Charity plans to recruit the following roles within year 3 of the business plan:

Job Title: Company Secretary

Supervised by: The Chief Executive Officer

Contract: Indefinite

Job Description:

- To oversee all administration within the charity.
- To oversee all financial and legal documentation and reporting.
- To maintain accurate records of all funding and all work undertaken by the charity.
- To support fundraising activities as required.

## Volunteers

The Charity has the following volunteer roles:

Fundraisers/Charity Shop workers

10 people working an average of 10 hours per week.


Social Media influencers

5 people working an average of 5 hours per month.

## Insurance

TYPE	LEVEL	Renewal date
Product liability	£5m	03/02/2025
Public liability	£5m	03/02/2025
Professional indemnity	£5m	03/02/2025

# Yearly Accounts

 <b>CHARITY COMMISSION</b> FOR ENGLAND AND WALES	Charity Name <b>Wonderful Life Academy</b>		No (if any) 1190534	<b>CC16a</b>
	<b>Receipts and payments accounts</b>			
For the period from	Period start date 21/04/2023	To	Period end date 20/04/2024	

## 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>					
Fundraising		-	-	-	-
Donations	560		-	560	-
Sales from Charity Shop	11,943		-	11,943	-
Other grants		3,500	-	3,500	-
Workshop fees		1,780	-	1,780	-
Grant from Foyle Foundation	-	5,000	-	5,000	-
Grant from Blue Light Card Foundation	10,000	-	-	10,000	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>22,503</b>	<b>10,280</b>	<b>-</b>	<b>32,783</b>	<b>-</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>22,503</b>	<b>10,280</b>	<b>-</b>	<b>32,783</b>	<b>-</b>
<b>A3 Payments</b>					
Payment to Coaches	32,665		-	32,665	-
Transport/Fuel/Parking	1,013		-	1,013	-
Telephone & Utility bills	1,080		-	1,080	-
Stationery and equipment	1,346	-	-	1,346	-
Insurance and fees	345	-	-	345	-
Postage	11	-	-	11	-
Building Materials	728		-	728	-
Rent /room hire	1,476	-	-	1,476	-
Refreshments	230	-	-	230	-
	-	-	-	-	-
<b>Sub total</b>	<b>38,894</b>	<b>-</b>	<b>-</b>	<b>38,894</b>	<b>-</b>
<b>A4 Asset and investment purchases, (see table)</b>					
Printers	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>38,894</b>	<b>-</b>	<b>-</b>	<b>38,894</b>	<b>-</b>
<b>Net of receipts/(payments)</b>	<b>- 16,391</b>	<b>10,280</b>	<b>-</b>	<b>- 6,111</b>	<b>-</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>7,808</b>	<b>-</b>	<b>-</b>	<b>7,808</b>	<b>-</b>
<b>Cash funds this year end</b>	<b>- 8,583</b>	<b>10,280</b>	<b>-</b>	<b>1,697</b>	<b>-</b>

## 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 £
<b>B1 Cash funds</b>	Funds remaining at end of period		-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	-	-	-
	(agree balances with receipts and payments account(s))			
<b>B2 Other monetary assets</b>	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Computer equipment	Unrestricted funds	1,673	500
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
			-	
Signed by CEO on behalf of all the trustees		Signature	Print Name	Date of approval
CCXX R2 accounts (SS)		2		15/05/2024

<i>N. Gowing</i>	Neil Gowing	15/05/2024

CCXX R3 accounts (SS)

3

15/05/2024



Section A

Independent Examiner's Report

Report to the trustees

Wonderful Life Academy

On accounts for the year  
ended

20/04/2024

Charity no  
(if any)

1190534

Set out on pages

2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and  
basis of report

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

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

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

*\* Please delete the words in the brackets if they do not apply.*

Signed:

Date:

11/06/2024

Name:

Kimberley Elliott

Relevant professional  
qualification(s) or body  
(if any):

CLC Licensed Conveyancer



**Address:** 22 Duchess Mews, York, YO26 5TA

## Section B

### Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**

N/A



## Strategic Risk Assessment

Risk Category	Risk Identified	Likelihood	Severity	Gross Risk	Control Measures	Net Risk	Further action	owner	review date
Governance									
	Lack of Forward planning or strategic direction				1. Create a financial plan and a budget. 2. Monitor Financial plan and operational performance at Trustee Meetings. 3. Create a strategic business plan and review at Trustee Meetings.		None	Board	Apr-23
	Retention and recruitment of Trustees				1. Draw up Trustee Recruitment policy. 2. Draw up Trustee Training programme.		Plans to be drawn up and agreed with Board	CEO	Oct-22
	Conflict of Interest				1. Agree protocol for disclosure of potential conflict of interest. 2. Agree procedures for standing down on certain decisions.		None	Board	Apr-23
	Loss of Key staff/Board members				1. Agree notice procedures. 2. Build a robust succession plan. 3. Draw up recruitment policy.		Policies to be drawn up and agreed with Board	CEO	Oct-22
Operational									
	Poor Service provision-Customer satisfaction				1. Implement Complaints policy and procedures. 2. Agree service standards and benchmark. 3. Spotcheck coaching sessions		Complaints policy drawn up and agreed with Board	CEO	Oct-22
	Competition from similar organisations				1. Maintain bespoke content and delivery. 2. Monitor public awareness and profile of Charity. 3. Consistently review marketing strategy.		None	Board	As required
	Volunteers				1. review and agree role, competencies 2. review and agree vetting procedures 3. review and agree training and supervision procedures 4. agree development and motivation initiatives		Draw up relevant plans	CEO	Oct-22
	Health and Safety				1. comply with law and regulation 2. train staff and compliance officer 3. put in place monitoring and reporting procedures		Implement Health & Safety Policy	Board	Oct-22
	Recruitment and Retention of Well-Being Coaches				1. Draw up recruitment policy. 2. Draw up robust training plans for Well-Being Coaches. 3. Build a robust succession plan. 4. Build a network of Coaches who will fill in as required.		Draw up relevant policies and agree with board	CEO	Oct-22

Financial									
	Lack of fundraising returns				1.Benchmark activities against similar organisations. 2.Review activity and returns at Trustee Meetings. 3.Agree Fundraising strategy with Board.		None	Board	As Required
	Inappropriate Fundraising				1.Implement fundraising policy 2.Implement authorisation process for Fundraisers.		Draw up relevant policy	CEO	Oct-22
	Fraud or error				1.Review financial control procedures 2.Segregate duties 3.Set authorisation limits 4.Agree whistle-blowing anti fraud policy		Draw up relevant policy	CEO	Oct-22
Environmental									
	Public perception				1.Communicate with supporters and beneficiaries 2. Ensure good quality reporting of the charity's activities and financial situation 3. Implement public relations training/procedures		Draft Public relations training	CEO	Oct-22
	Adverse publicity				1. Implement complaints procedures (both internal and external) 2.Agree proper review procedures for complaints 3, Agree a crisis management strategy for handling - including consistency of key messages and a nominated spokesperson		Draft Crisis Management Strategy	CEO	Oct-22
	Government policy				1. Monitor proposed legal and regulatory changes 2. Consider membership of appropriate umbrella bodies		None	Board	Ongoing
	Health, safety and environment				1.Comply with law and regulation 2, Train staff and compliance officer 3.Put in place monitoring and reporting procedures		Implement Health & Safety Policy	CEO	Oct-22
Legal/Compliance									
	Compliance with legislation and regulations appropriate to the activities, size and structure of the charity				1. Identify key legal and regulatory requirements 2, Allocate responsibility for key compliance procedures 3. Put in place compliance monitoring and reporting.		None	Board	Oct-22
	Regulatory reporting requirements:				1. Review and agree compliance procedures and allocation of staff responsibilities		None	Board	Apr-22

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

Signed on behalf of the charity's trustees

Name: Neil Gowing

Signature: ***Neil Gowing***

Position: Chief Executive Officer

Date: 11/06/2024