



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From date **31/5/20** **To** **1/6/21** **Period end**

Charity name: The Phoenix Medical Project

Charity registration number: 1191100

Objectives and Activities

| | SORP reference | |
|--|--------------------|---|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | For the public benefit to advance the education of displaced doctors in the UK in such ways as the charity trustees think fit, including by: 1. Awarding to such persons grants, enabling them to take language exams that contribute to their ability to practice in the UK, and travel expenses to allow them to attend teaching sessions. 2. Providing teaching sessions for the advancement of the participants proficiency in English language |
| Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts. | Para 1.17 and 1.19 | Subsidising fees for exams necessary for displaced doctors to qualify for work in the UK. Delivering online teaching sessions to prepare beneficiaries for said exams. Providing grants to cover fees of preparatory materials for said exams. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit | Para 1.18 | We the trustees have read and understood the guidance stated. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|------------------------|----------------|--|
| Policy on grant making | Para 1.38 | We award retrospective grants upon the provision of evidence of an exam successfully passed, worth 50% of the exam's full cost in pounds sterling. Only available to participants we have worked with prior to the exam sitting. |

| | | |
|--|-----------|--|
| Policy on social investment including program related investment | Para 1.38 | |
| Contribution made by volunteers | Para 1.38 | |
| Other | | |

Achievements and Performance

| | SORP reference | |
|---|----------------|--|
| Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole. | Para 1.20 | <p>We have subsidised the exam fees of 4 beneficiaries (2 for the <u>second part of the Professional and Linguistic Assessments Board test (PLAB2)PLAB2-exam</u>, 2 for the <u>Occupational English Test (OET)</u>). Those that have passed the PLAB2 have passed all necessary examinations to practice in the UK and will benefit the patient populations of their future <u>NHS</u> trusts. We have grown to reach beneficiaries in Nottingham, Leeds, Bristol and Birmingham.</p> <p>Our medical student volunteers have been provided with strong evidence of contribution relevant to their future careers as doctors.</p> <p>We have also provided several smaller grants for exam materials to help beneficiaries prepare effectively for said exams themselves.</p> |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|--|-----------|---|
| Achievements against objectives set | Para 1.41 | |
| Performance of fundraising activities against objectives set | Para 1.41 | We raised £3000 in total for the year which matched our budgeted target for the financial year ending 1/6/21. |

| | | |
|---|-----------|-----|
| | | |
| Investment performance against objectives | Para 1.41 | N/A |
| Other | | |

Financial Review

| | | |
|--|-----------|--|
| Review of the charity's financial position at the end of the period | Para 1.21 | |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | |
| Amount of reserves held | Para 1.22 | |
| Reasons for holding zero reserves | Para 1.22 | |
| Details of fund materially in deficit | Para 1.24 | |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 | |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|--|
| The charity's principal sources of funds (including any fundraising) | Para 1.47 | |
| Investment policy and objectives including any social investment policy adopted | Para 1.46 | |
| A description of the principal risks facing the charity | Para 1.46 | |
| Other | | |

Structure, Governance and Management

| | | |
|---|-----------|--|
| Description of charity's trusts: | | |
| Type of governing document (trust deed, royal charter) | Para 1.25 | |
| How is the charity constituted? (e.g unincorporated association, CIO) | Para 1.25 | |
| Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees | Para 1.25 | |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|--|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | |
| Relationship with any related parties | Para 1.51 | |
| Other | | |

Reference and Administrative details

| | |
|-----------------------------|--|
| Charity name | |
| Other name the charity uses | |
| Registered charity number | |

| | |
|-----------------------------|--|
| Charity's principal address | |
| | |

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 | Jonathan Bowley | | | |
| 2 | Molly Kavanagh | | | |
| 3 | Rohan Bassi | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |
| 14 | | | | |
| 15 | | | | |
| 16 | | | | |
| 17 | | | | |
| 18 | | | | |
| 19 | | | | |
| 20 | | | | |

Corporate trustees - names of the directors at the date the report was approved

| Director name | | |
|---------------|--|--|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Name of trustees holding title to property belonging to the charity

| Trustee name | Dates acted if not for whole year | |
|--------------|-----------------------------------|--|
| | | |
| | | |
| | | |

| | | |
|--|--|--|
| | | |
| | | |
| | | |

Funds held as custodian trustees on behalf of others

| | |
|---|--|
| Description of the assets held in this capacity | |
| Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects | |
| Details of arrangements for safe custody and segregation of such assets from the charity's own assets | |

Additional information (optional)

Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
| | | |
| | | |
| | | |
| | | |

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

| |
|--|
| |
|--|

Exemptions from disclosure

Reason for non-disclosure of key personnel details

| |
|--|
| |
|--|

Other optional information

| |
|--|
| |
|--|

Declarations

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

Signed on behalf of the charity’s trustees

Signature(s)

| | |
|--|--|
| | |
|--|--|

Full name(s)

| | |
|--|--|
| | |
|--|--|

**Position (eg
Secretary, Chair, etc)**

| | |
|--|--|
| | |
|--|--|

Date

| |
|--|
| |
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CHARITY COMMISSION
FOR ENGLAND AND WALES

The Phoenix Medical Project

1191100

Receipts and payments accounts

For the period
from

6/1/2020

To

5/31/2021

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 | | | | |
| Iguano | 2,000 | - | - | 2,000 |
| Jonathan Bowley | 5 | - | - | 5 |
| | - | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| Sub total (Gross income for AR) | 2,005 | - | - | 2,005 |
| A2 Asset and investment sales, (see table). | | | | |
| | - | - | - | - |
| | - | - | - | - |
| Sub total | - | - | - | - |
| Total receipts | 2,005 | - | - | 2,005 |
| A3 Payments | | | | |
| Travelling expenses (refugee attendees) | | - | - | - |
| | | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| | - | - | - | - |
| Sub total | - | - | - | - |
| A4 Asset and investment purchases, (see table) | | | | |
| | - | - | - | - |
| | - | - | - | - |
| Sub total | - | - | - | - |
| Total payments | - | - | - | - |
| Net of receipts/(payments) | 2,005 | - | - | 2,005 |
| A5 Transfers between funds | - | - | - | - |
| A6 Cash funds last year end | 957 | - | - | 957 |
| Cash funds this year end | 2,962 | - | - | 2,962 |

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 | bank account | 2,962 | - |
| | | - | - |
| | | - | - |
| | Total cash funds | 2,962 | - |
| | (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 |
| | | Jonathan Bowley | Jonathan Bowley |
| | | | |

CC16a

Last year
to the nearest £

| |
|-------|
| 1,000 |
| - |
| - |
| - |
| - |
| - |
| - |
| - |
| 1,000 |

| |
|---|
| - |
| - |
| - |

| |
|-------|
| 1,000 |
|-------|

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| 43 |
| - |
| - |
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| - |
| - |
| - |
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| - |
| - |
| 43 |

| |
|---|
| - |
| - |

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|----|
| 43 |
|----|

| |
|-----|
| 957 |
| - |
| - |
| 957 |



**Endowment
funds**

to nearest £

| |
|---|
| - |
| - |
| - |
| - |

OK

**Endowment
funds**

to nearest £

| |
|---|
| - |
| - |
| - |
| - |
| - |
| - |

**Current value
(optional)**

| |
|---|
| - |
| - |
| - |
| - |
| - |

**Current value
(optional)**

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**When due
(optional)**

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Date of
approval

| |
|-----------|
| 1/16/2021 |
| |