



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1st April 2022 To 31st March 2023

Charity name: The Luke Wheaton Legacy Trust

Charity registration number: 1194925

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	(a) To advance the vocational training and physical education of pupils at Bradley Stoke Community School and other Olympus Academy Trust schools, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to: (i) recognise and reward vocational and/or sporting excellence; and/or (ii) enable such persons to prepare for entry into any occupation, trade or profession on leaving any educational establishment; (b) to advance in life and help young athletes in South Gloucestershire and surrounding areas who have need by reason of their youth, age, infirmity or disability, poverty or social and economic circumstances with a view to improving the conditions of life and advancing the education of such persons, in particular but not exclusively by providing grants and items to individuals in need and/or charities or other organisations working to support such persons; And (c) to advance in life and help young athletes in South Gloucestershire and surrounding areas, in particular but not exclusively by providing and assisting in the provision of financial or other assistance to recognise and reward sporting excellence.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or	Para 1.17 and 1.19	We continue to help young people excel both as individuals and through group sports and activities. Along side this we have put on our first apprenticeship

services identified in the accounts.		open evening and have been promoting the benefits of apprenticeships.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	All trustees have been required to read and have regard to the guidance issued by the Charity Commission on public benefit before becoming a trustee.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	NA
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	NA
Other		NA

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 continued to support primary aged children with access to a skipping fitness programme, with all staff and children trained. Skipping resources are provided for schools and this will culminate in a fund raising event for all children in each school to raise sponsorship and through the year to develop and improve their fitness.</p> <p>The refurbishment and replacement of equipment in the Bradley Stoke Community School fitness suite (now named the Luke Wheaton Fitness Suite) which will benefit the teaching of fitness to all students in the school and will benefit</p> <p>the students having access to a well-equipped fitness suite as part of</p>

		<p>extra-curricular programmes.</p> <p>We have been supporting local sports clubs with funding to allow them to continue after covid. This means that young people can continue to have access to local sport and activities. We have also been helping young individuals progress with their athletics.</p> <p>The Trust has contributed towards the start up costs and promoted the benefits for a new local Park run which is open to ages 7 upwards and now takes place weekly.</p> <p>We continue to support and fund both girls football and rugby teams to allow more young people to have access to sport regardless of gender.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	NA
Performance of fundraising activities against objectives set	Para 1.41	<p>We have held another annual fundraising event ‘Luke’s Event’ along with raffles, and auctions. Local sports clubs have held memorial matches and individuals have raised money through sponsorship for events such as Ironman and walking challenges.</p> <p>We have beat our fundraising target by almost 5k this year.</p>
Investment performance against objectives	Para 1.41	NA
Other		NA

Financial Review

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

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	Annual sports tournaments and family day at NBRFC. Other fundraising activities by individuals, clubs and donations from businesses.
Investment policy and objectives including any social investment policy adopted	Para 1.46	NA
A description of the principal risks facing the charity	Para 1.46	NA
Other		NA

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Trust deed
How is the charity constituted? (e.g. unincorporated association , CIO)	Para 1.25	CIO
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	<p>Eligibility for trusteeship</p> <p>(a) Every charity trustee must be a natural person.</p> <p>(b) No one may be appointed as a charity trustee: (i) if he or she is under the age of 16 years; or (ii) if he or she would automatically cease to hold office under the provisions of clause 15.1(f).</p> <p>(c) No one is entitled to act as a charity trustee whether on</p> <p>appointment or on any re-appointment until he or she has</p> <p>expressly acknowledged, in whatever way the charity trustees decide, his or her acceptance of the office of charity trustee.</p> <p>(d) At least one of the trustees of the CIO must be 18 years of age or over. If there is no trustee aged at least 18 years, the remaining trustee or trustees may act only to call a meeting of the charity trustees, or appoint a new charity trustee.</p> <p>Elected charity trustees</p> <p>(a) Following the first annual general meeting of the members of the CIO, one-third of the elected charity trustees shall retire from office every three (3) years. If the number of elected charity trustees is not three or a multiple of three, then the number nearest to one-third shall retire from office, but if there is only one charity trustee, he or she shall retire;</p> <p>(b) The charity trustees to retire by rotation shall be those who have been longest in office since their last appointment or reappointment. If any trustees were last appointed or reappointed on the same day those to retire shall (unless they otherwise agree among themselves) be determined by lot;</p> <p>(c) The vacancies so arising may be filled by the decision of the members</p>

		<p>at the annual general meeting; any vacancies not filled at the annual general meeting may be filled as provided in sub-clause (d) of this clause;</p> <p>(d) The charity trustees may at any time decide to appoint a new charity trustee, whether in place of a charity trustee who has retired or been removed in accordance with clause 15 (Retirement and removal of charity trustees), or as an additional charity trustee, provided that the limit specified in clause 12.3 on the number of charity trustees would not as a result be exceeded;</p> <p>(e) A person so appointed by the members of the CIO shall retire in accordance with the provisions of sub-clauses (a) and (b) of this clause. A person so appointed by the charity trustees shall retire at the conclusion of the annual general meeting next following the date of his appointment, and shall not be counted for the purpose of determining which of the charity trustees is to retire by rotation at that meeting.</p> <p>13.2 Nominated Charity Trustees</p> <p>(a) Bradley Stoke Community School, Bradley Stoke Youth Football Club, North Bristol Rugby Football Club and Stoke Lane Football Club (each an “Appointing Body” and together, the “Appointing Bodies”) may each appoint one (1) charity trustee.</p> <p>(b) Any appointment must be made at a meeting held according to the ordinary practice of the appointing body.</p> <p>(c) Each appointment must be for a term of three (3) years.</p> <p>(d) The appointment will be effective from the later of: (i) the date of the vacancy; or (ii) the date on which the CIO is informed of the appointment.</p> <p>(e) The person appointed need not be a member of the appointing body.</p> <p>(f) A trustee appointed by the appointing body has the same duty under Clause 12.1 as the other charity trustees to act in the way he or she decides in good faith would be most likely to further the purposes of the CIO.</p>
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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	NA
The charity's organisational structure and any wider network with which the charity works	Para 1.51	NA
Relationship with any related parties	Para 1.51	NA
Other		NA

Reference and Administrative details

Charity name	The Luke Wheaton Legacy Trust
Other name the charity uses	Luke's Legacy Trust
Registered charity number	1194925
Charity's principal address	Bradley Stoke Community School Fiddler's Wood Lane Bradley Stoke BS32 9BS

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	Jamie Wheaton	Chair		
2	Paula Miles	Treasurer		
3	Matt Wheaton			
4	Andy Young	Vice Chair		
5	Steve Moir			
6	Martin Randall			
7	Simon Bryant			
8	Jamie Mayes			
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

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

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)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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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)	Jamie Wheaton	
Position (eg Secretary, Chair, etc)	Chair	
Date	07/01/2024	



Receipts and pay

For the period
from

1/4/2022

Section A Receipts and payments

	Unrestricted to the nearest £	Restricted funds to the nearest £
A1 Receipts		
Donations, legacies and grants	7,245	-
Fundraising events	6,981	-
Interest on deposit account	-	-
Fees for charitable services	-	-
Activities for generating funds (trading)	591	-
	-	-
	-	-
	-	-
Sub total(Gross income for AR)	14,816	-
A2 Asset and investment sales, (see table).		
	-	-
	-	-
Sub total	-	-
Total receipts	14,816	-
A3 Payments		
Grants and donations paid	12,120	-
Bank interest and charges	30	-
Cost of fundraising events	901	-
Fundraising costs (trading activities)	221	-
Printing, postage, stationery and computer supplies	35	-
	-	-
	-	-
	-	-
	-	-
Sub total	13,307	-
A4 Asset and investment purchases, (see table)		
	-	-
	-	-
Sub total	-	-
Total payments	13,307	-
Net of receipts/(payments)	1,509	-
A5 Transfers between funds	-	-
A6 Cash funds last year end	-	-
Cash funds this year end	1,509	-

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

Categories	Details
B1 Cash funds	
	Total cash funds
	(agree balances with receipts and payments account (s))


	Details
B2 Other monetary assets	

	Details
B3 Investment assets	

	Details
B4 Assets retained for the charity’s own use	

	Details
B5 Liabilities	

Signed by one or two trustees on behalf of all the trustees

Signature


	2	CC16a
ments accounts		
To	31/3/2023	



Endowment to the nearest £	Total funds to the nearest £	Last year to the nearest £
-	7,245	44,603
-	6,981	371
-	-	-
-	-	-
-	591	-
-	-	-
-	-	-
-	-	-
-	14,816	44,974

-	-	
-	-	-
-	-	-

-	14,816	44,974
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-	12,120	4,426
-	30	69
-	901	-
-	221	-
-	35	-
-	-	-
-	-	-
-	-	-
-	-	-
-	13,307	4,495

-	-	
-	-	
-	-	

-	13,307	4,495
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-	1,509	40,479
-	-	-
-	-	-
-	1,509	40,479

Unrestricted to nearest £	Restricted funds to nearest £	Endowment to nearest £
41,988	-	-
-	-	-
-	-	-
41,988	-	-
Agreement Error	OK	OK

Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-

Fund to which asset	Cost (optional)	Current value
	-	-
	-	-
	-	-
	-	-
	-	-

Fund to which asset	Cost (optional)	Current value
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-

Fund to which	Amount due	When due
	-	
	-	
	-	
	-	
	-	

Print Name	Date of approval
Jamie Wheaton	14/11/2023