

LUTON ROMA TRUST

England & Wales · Charity number 1202863

Details

Status Registered

Legal form CIO

Registered 2023-04-27

Register [View on the Charity Commission register](#)

Contact

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15 New Bedford Road
Luton
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Website www.lutonromatrust.org.uk

Activities

Objects: TO PROMOTE SOCIAL INCLUSION FOR THE PUBLIC BENEFIT AND THE BENEFIT OF ROMA PEOPLE IN LUTON AND SURROUNDING AREAS BY PREVENTING PEOPLE FROM BECOMING SOCIALLY EXCLUDED, RELIEVING THE NEEDS OF THOSE PEOPLE WHO ARE SOCIALLY EXCLUDED AND ASSISTING THEM TO INTEGRATE INTO SOCIETY.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty, Economic/community Development/employment, Human Rights/religious Or Racial Harmony/equality Or Diversity
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin

Geography

- Bedford
- Buckinghamshire
- Central Bedfordshire
- Hertfordshire
- Luton

Finances

| Period end | Income | Expenditure | Assets | Employees |
|------------|----------|-------------|--------|-----------|
| 2025-08-31 | £157,245 | £132,204 | - | - |
| 2024-08-31 | £336,955 | £188,418 | - | - |

Trustees

| Name | Role | Appointed |
|--|-------|------------|
| Rt Revd Richard William Bryant Atkinson OBE | Chair | |
| Dr Helen Ann Connolly | | |
| Rev MARTIN JOHN BURRELL | | |
| Revd. Canon Liz Hughes | | |
| STEVEN GARY DOLBY | | 2025-05-02 |
| Valdemar Kalinin | | |

LUTON ROMA TRUST

England & Wales - Charity number 1202863

Accounts



**REPORT OF THE TRUSTEES AND FINANCIAL STATEMENTS
FOR THE YEAR ENDING 31 AUGUST 2025**

REGISTERED CHARITY NUMBER: 1202863 (ENGLAND AND WALES)

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Board of Trustees Statement

The Trustees present their report including the financial statements of the charity for the year ended on 31 August 2025. The Trustees have adopted the provisions of the Statement of Recommended Practice (SORP) 'Accounting and Reporting by Charities' issued in March 2005.

I. Our Mission and Vision

Roma people are an ethnic group whose origins trace back to India. Today, they are dispersed across Europe, with the largest populations found in Central and Eastern European countries such as Romania and Bulgaria. Migration to the United Kingdom increased significantly following the accession of several Central and Eastern European countries to the European Union, enabling freedom of movement and new opportunities for many families.

However, for many Roma individuals, this migration has been shaped by a long history of discrimination, social exclusion, and poverty in their countries of origin. Educational opportunities have often been limited, with many having attended segregated schools. As a result, Roma communities arriving in the UK frequently face multiple and interconnected challenges, particularly in areas such as Luton. These include high levels of illiteracy, limited English language proficiency, low digital skills, and a lack of familiarity with how national systems and services operate. These barriers do not only affect individuals and families, they also impact meaningful social integration and limit the potential contributions Roma people can make to the wider society. Without targeted and culturally sensitive support, many remain at the margins of society, unable to fully access the opportunities available to them.

It is in direct response to these challenges that Luton Roma Trust was established. Our mission is to enhance the lives of the the Roma living in Luton and surrounding areas and to support their to integration into the wider life of the town. We exist to bridge the gap between potential and opportunity, helping individuals navigate systems, build skills, and gain the confidence needed to participate fully in society.

Our vision goes beyond social integration. We seek to inspire hope and expand horizons, to help individuals move beyond a life shaped by exclusion or survival, and towards one defined by dignity, opportunity, and belonging. Central to this vision is our long-term commitment to empowering the next generation of Roma in Luton and surrounding areas, many of whom were born in the United Kingdom. By encouraging engagement with education and promoting it as a pathway to opportunity, we aim to break cycles of disadvantage and open doors to a brighter future.

In doing so, we support young people to retain the richness of their cultural identity while also contributing meaningfully to wider community. With the right support, Roma individuals have

the potential not only to integrate, but to thrive, and in doing so, to enrich the social and economic fabric of Luton as a whole. Luton Roma Trust, therefore, plays a vital role, not only in supporting the Roma community, but in helping to build a more inclusive, cohesive, and prosperous society for everyone.

II. Brief History of Luton Roma Trust

The story of Luton Roma Trust began in 2009, when Revd. Martin Burrell, one of its three founders, moved to Luton after working with Roma communities in various parts of the United Kingdom. On arriving, he began supporting the Eastern European Roma community, who welcomed him warmly. Committed to building trust and making a meaningful difference, Martin learned the Romani language to better communicate with and support the people he served. As the Roma community in Luton grew, so too did the complexity of its needs. Recognising this, in 2015 Martin joined with the Bishop of Bedford, the Rt. Revd. Richard Atkinson, and Revd. Chris Neilson to formally establish Luton Roma Trust as a charity. From that point on, the organisation has played a vital role in supporting Roma residents in Luton, helping them to integrate more fully into local life, access essential services, enrol their children in school, and secure employment.

Since its founding, Luton Roma Trust has developed a holistic approach to support, addressing the interconnected challenges faced by the community. This model has increasingly been recognised as an effective and impactful approach to Roma integration across the UK. Today, the work of Luton Roma Trust has contributed to a growing recognition of Roma people as one of the most vulnerable communities in Luton. There is also increasing awareness among professionals of the importance of understanding the specific needs and experiences of this community in order to provide appropriate and effective support. This marks an important step forward in the organisation's journey, as it continues to build on its achievements and work towards a more inclusive future.

III. Organisational Structure

Luton Roma Trust is governed by a Board of Trustees, which provides oversight of the organisation's mission, strategic direction, and overall governance. The Board is chaired by the Rt. Revd. Richard Atkinson OBE, Bishop of Bedford, and consists of six members: Revd Martin Burrell, Revd Canon Liz Hughes, Steve Dolby, John Barr¹, Valdemar Kalinin, and Dr Helen Connolly.

The Trustees bring a diverse range of experience and perspectives to the organisation. Rt Revd Richard Atkinson OBE is a very experienced Chair and Trustee of many enterprises. Steve Dolby, who joined the Board in May 2025, is a longstanding advocate for equality and social justice. Revd Canon Liz Hughes serves as Chaplain at London Luton Airport, a key point of

¹ John Barr resigned from the Board of Trustees in September 2025

arrival and departure for many Roma individuals travelling from Central and Eastern Europe, and plays an important role in directing newly arrived families to access appropriate support. John Barr, who is of Romani heritage, contributes valuable lived experience that informs and strengthens the organisation's work. Valdemar Kalinin is a respected Roma poet and writer, and notably the first to translate the Christian Bible into the Romani language. Dr Helen Connolly is a professor with recognised expertise in migration and social policy.

The day-to-day delivery of the charity's mission and vision is led by the Charity Manager, Crina Morteau, who works closely with the Board of Trustees to implement the organisation's strategic and operational priorities. She is supported by a dedicated staff team, including a Roma Education Champion, Support Worker, Roma Youth Ambassador, Project Assistant, Charity Administrator, and Finance Officer. In addition, Luton Roma Trust benefits from the contribution of one volunteer. Together, the team ensures the effective delivery of services and support to the Roma community in Luton and the surrounding areas.

IV. Objectives and Activities

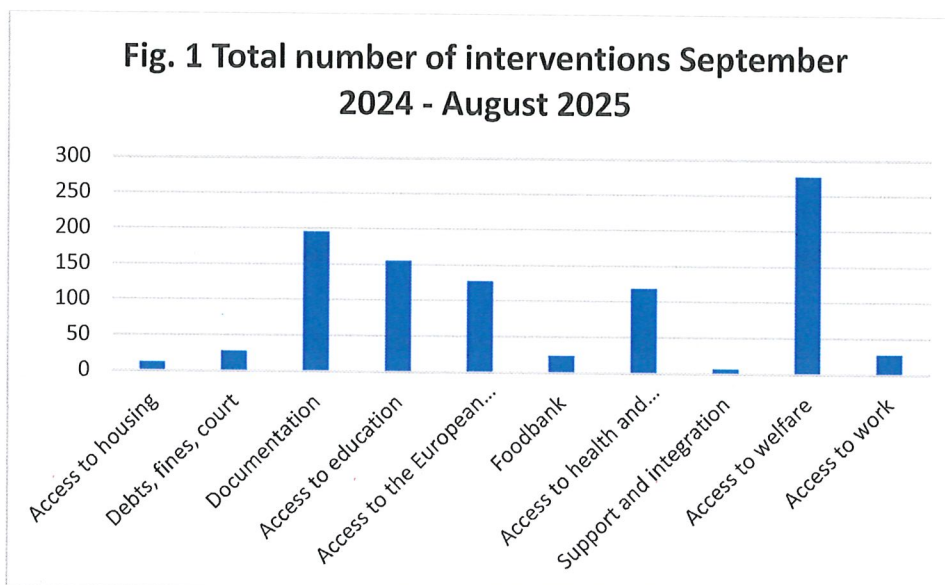
During the reporting period, Luton Roma Trust delivered its work in line with four key strategic objectives:

- A. To provide holistic support that enables Roma community members to access essential services in Luton.
- B. To improve English language proficiency and develop digital skills within the Roma community.
- C. To build the self-esteem of young Roma people, supporting them to continue their education and ultimately achieve their aspirations.
- D. To work in partnership with statutory bodies—both locally and nationally—as well as universities, in order to drive meaningful and lasting improvements in people's lives.

V. Achievements and Performance

A. Access to Essential Services

Between September 2024 and August 2025, Luton Roma Trust carried out 975 interventions across ten key areas of need, including housing, debts and legal matters, documentation, education, the EU Settlement Scheme, foodbank provision, health and wellbeing, social integration, welfare support, and employment.



Similarly to previous years, the highest number of interventions was in the area of access to welfare, accounting for 277 interventions. Luton Roma Trust supported individuals in applying for a range of benefit schemes, managing their Universal Credit accounts, liaising with relevant authorities on their behalf, and providing interpreting support where needed. The second highest area of intervention was documentation (196 interventions). This included assisting individuals with obtaining birth certificates and passports, as well as supporting citizenship applications and other essential paperwork. In the area of education, Luton Roma Trust supported 156 Roma children by assisting with school admissions, acting as a bridge between schools and families, and providing support in relation to school fines where necessary. A further 128 individuals were supported under the European Union Settlement Scheme. This included help with obtaining share codes to prove immigration status to employers or other institutions, as well as updating personal details on UKVI accounts. Support for health and wellbeing accounted for 119 interventions. This included assisting individuals in registering with GP surgeries, booking and attending medical appointments, communicating with healthcare providers on their behalf, and accompanying them to appointments at Luton & Dunstable Hospital for consultations or procedures. Additional areas of support included access to work (28 interventions), debts, fines, and court-related matters (28 interventions), access to housing (12 interventions), and general support and integration (7 interventions). Although these figures are comparatively lower, they highlight the ongoing challenges faced by the Roma community in achieving full independence and integration, as well as their continued reliance on Luton Roma Trust for support in these areas.

Finally, Luton Roma Trust supported 24 Roma families with foodbank vouchers, a figure consistent with the previous year, when 25 families received similar support. Over the course of the reporting period, the organisation delivered approximately 2,925 hours of direct support to Roma individuals and families.

In addition to this formally recorded work, it is important to recognise the significant level of informal support provided. There were at least 50 instances of assistance delivered in community settings—such as on the street or during home visits—which were not captured in the organisation’s database, further highlighting the breadth of support offered.

B. Strengthening Digital Skills in the Roma community

During the reporting period, with funding from the Wixamtree Trust, Luton Roma Trust successfully delivered two digital skills courses benefiting a total of 12 Roma individuals. Participants are now able to send emails, access their Universal Credit accounts online, and communicate digitally with the schools where their children are enrolled in Luton.

Our experience shows that the Roma community in Luton currently faces significant barriers to accessing digital services due to multiple vulnerabilities previously outlined. By investing in the development of digital skills, we aim to support their broader social integration, enabling them to book GP appointments, manage their Universal Credit accounts independently, and engage effectively with their children’s education.

Despite some challenges during the project’s implementation, our partnership with Noah Enterprise enabled us to successfully train 12 community members, all of whom have reported increased confidence in their digital abilities as a direct result of the course. In particular, one participant said: "The digital skills course has really helped improve my life. These skills gained during the course, have taught me how to do online shopping, how to access my bank account or how to look for jobs. I am now more comfortable to using technology in my daily life."
(Roma community member)



(Digital skills instructor guiding Roma participants on how to use a computer mouse)

Alongside digital skills project, It is important to highlight that during the reporting period, Luton Roma Trust has made significant progress in developing an ESOL course titled "English for Life" specifically for the Roma community, in partnership with Noah Enterprise. Although the course will begin delivery after September 2025, beyond the current reporting period, we have already registered 10 Roma participants and received strong interest from the community eager to enroll.

C. Early Years Education Support

During the reporting period, Luton Roma Trust has started implementing the three years Early Years Education project with funding from the Alder Fund (Diocese of St. Albans) aimed at supporting Roma children of pre-school age to benefit from workshops similar to a nursery setting. As such, they will learn basic English, get accustomed with rules, enjoy playing together, get familiar with using the English alphabet etc. The skills developed through the workshops will further support their educational outcomes when joining school as, based on our work with Roma children for many years, very few of them if none of them attend nurseries and this impacts they adaptation at school. Workshops will start being delivered in September 2025.

During the reporting period, Luton Roma Trust organised an eight-week after-school art and craft club in the lead-up to Christmas, designed for children and their caregivers. It was wonderful to see families engaging together, getting hands-on, exploring creativity, and enjoying shared moments of learning and expression.



(Roma children taking part in the After School Art Club)

D. Mental Health and Wellbeing

During the reporting period, with support from Luton Council and Bedfordshire and Luton Community Foundation, and in partnership with Flying Start, Luton Roma Trust delivered weekly workshops for the Roma community focused on basic mental health concepts. Recognising that mental health is often a taboo subject within the Roma community, we deliberately framed the sessions as "Wellbeing Sessions" to reduce stigma and encourage open participation. We created a welcoming and relaxed environment where participants could share their concerns over a cup of coffee and biscuits. The sessions included guided meditation techniques to help manage everyday stress, as well as discussions on the benefits of maintaining good mental health.

The project has had a significant positive impact on participants. One attendee shared: *"Since I have attended the sessions, I feel I have more friends, and I can't wait to come every week."* (**Roma community member**)



(Participants attending one of the mental health and wellbeing sessions alongside our partner from Flying Start)

Providing a safe and welcoming space for the Roma community has allowed us not only to address one of the community's most significant taboos but also to help reduce isolation and encourage individuals to focus on their own wellbeing. Building on this success, Luton Roma Trust will seek funding to continue delivering these important workshops.

E. Celebration of Roma Culture and Heritage During GRT History Month

i. Celebratory event at Luton Council

During June, we proudly celebrated Gypsy, Roma, and Traveller (GRT) History Month with a series of meaningful events and activities. Luton Roma Trust, in partnership with Luton Council and Luton Irish Forum, hosted a special celebration at Luton Council. A particularly powerful moment was the first-ever raising of the Roma flag by the Council, an emotional and hopeful occasion for the many Roma community members in attendance.



(Roma Flag Irish Traveller Flag and being raised at Luton Council)



(Roma community members together with Luton's Mayor Amy Nicholls and Cllr. Javed Hussain)

ii. GRT Cultural Awareness Training

As part of our ongoing commitment to improving understanding of GRT communities, Luton Roma Trust also delivered a GRT Cultural Awareness Training in collaboration with Gate Herts² charity and members of the GRT Forum.³ The session was attended by professionals from GP surgeries within the Primary Care Network, who reported a significant increase in their knowledge and awareness of GRT communities. Building on this success, we aim to secure funding to expand and deliver similar training opportunities to professionals across Luton and surrounding areas.

This initiative was made possible through collaboration with Luton Council, HealthWatch, Luton Irish Forum, and the Primary Care Network and it was also informed by key findings from Luton Roma Trust's report, "Access to Health in Roma Communities," developed in partnership with the University of Bedfordshire in 2024.

² For more information on Gate Herts, please check: <https://gateherts.org.uk>

³ The GRT Forum is an initiative established by Luton Council in partnership with Luton Irish Forum and Luton Roma Trust. It brings together local services professionals, charities and members of the GRT community to discuss how to best support the communities to socially integrate.



(Image showing LRT's Charity Manager explaining the difference between the GRT communities)

iii. Gypsy, Roma and Traveller Conference “Roots and Routes”

In partnership with Luton Irish Forum, we co-organised the Gypsy, Roma and Traveller Conference, *"Roots and Routes – Where We Were and Where We Are Going"*. This event brought together community members, academics, and professionals to celebrate the richness of GRT culture, while also reflecting on the opportunities available to the new generation of young people to thrive and succeed. Many described it as the best conference they had attended, highlighting its emotional resonance, inclusivity, and educational value.

VI. Financial Review

During 1st of September 2024 to 31st August 2025, Luton Roma Trust had eight sources of income: Tudor Trust Fund, The National Lottery Community Fund, Bedfordshire and Luton Community Foundation, Wixamtree Trust Fund, Postcode Places Trust, Heriot Watt University and Diocese of St. Albans (Allder Fund).

The Tudor Trust an unrestricted grant of £90,000 over 3 years from April 2021 for supporting the access of Roma children to school. During the reporting period the total funds received by the CIO was £49,307 - the amount of £44,000 came directly to the CIO and £35,307 was received within the transfer of assets. A total amount of £20,619 was used towards covering Roma Education Champion's salary. A further £12,594 was spent on support costs and operational activities and events. An amount of £22,733 was brought forward and out of it, £14,930 was spent on salaries, £48 on travel and £7755 remains as the closing balance at the end of August 2025.

The National Lottery Community Fund a restricted grant of £373,853 over three years from November 2022 to October 2025. During the reporting period the total funds received by the CIO was £222,200 - the amount of £157,747 came directly to the CIO and £64,453 was received within the transfer of assets. The amount spent of £134,453 was used towards covering the running costs of the charity including salaries for the Charity Manager, Support Worker, Charity Administrator, Finance Officer and Young Roma Ambassador.

Bedfordshire & Luton Community Foundation (Innovation and Collaboration Fund)

a restricted grant of £6,987.00 from April 2025 to September 2025 to implement a pilot project on *Mental Health for the Roma Community* in order to raise awareness about the benefits of mental health and wellbeing in the Roma community. The grant was paid in three installments: £4000 at the start of the project, £2487 on completion of BLCF's visit and £500 at the end of the project upon a satisfactory end of grant report. During the implementation of the project, Luton Roma Trust received total funds of £6487.

Heriot-Watt University a restricted grant of £33,832 from February 2024 to January 2027 to work on implementing a project in regards of Roma people's healthy ageing. The main funder of the project is UK Research Council who has awarded Heriot Watt University, as the project manager, a total of £1.1. million to identify barriers faced by Roma people in accessing healthcare and other services in mid to later life. The project will then co-design new place-based 'Integrated Hubs' to better connect Roma people with culturally appropriate health, wellbeing and community resources which build upon existing expertise and assets within the community.

Luton Roma Trust's role in this project, is to facilitate the collection of data in Luton as well as to co-contribute to designing effective ways of improving the health situation of the Roma people in the UK. More on this project can be found at: <https://www.hw.ac.uk/news-archive/2024/major-new-research-to-tackle-health.htm>

During the reporting period the total amount received by Luton Roma Trust was £ 8274 and there was an amount of £6182 carried forward. The total expenditure during the implementation of the project was £12, 266 which has been used towards covering one day a week for the Charity Manager and associated salary costs.

St Paul's Church, St Albans a designated fund of £1,500 from July 2024 to build deeper relationships with children and their families through arts and craft clubs and day trips. During the reporting period the total funds received by the Luton Roma Trust was £1,500, which came directly to the CIO. During the reporting period, an amount of £49 was spent on Children and Youth activities.

Wixamtree Trust Fund a restricted fund of £6000 from November 2024 to October 2025 to improve Roma's digital skills. In total, 12 Roma participants have received training on digital skills.

Postcode Places Trust an unrestricted fund of £25,000 from May 2025 to October 2026 to support the Roma community overcome systemic barriers. During the reporting period, an amount of £1800 was spent leaving the closing balance at £23, 200.

Diocese of St. Albans (Alder Fund) a restricted fund of £119,997.67 from November 2024 to October 2027 to improve Roma children's early education outcomes. Through this project, Luton Roma Trust delivers workshops for Roma children aged 2–4, providing a nursery-style learning environment, and promotes Roma culture in schools across Luton through presentations and training. During the reporting period, Luton Roma Trust received £32,693.13 associated with salary costs and implementation of activities.

VII. Reserves Policy

The trustees have considered the requirements for a reserves policy and reviewed the level of reserves held and have determined that an amount equivalent to 3 months regular income would be sufficient as free reserves. Based upon this information would mean an amount of around £33,000 - £40,000 is kept as free reserves. At the end of the year the level of free reserves was £27,500 which is below the stated reserve level. However, there is a further £8,000 held in unrestricted funds, some of which can be spent on activities and events that might need to be funded by reserves.

VIII. Plans for the Future

The Trustees remain committed to ensuring the long-term sustainability of the charity and will continue to monitor this as a key priority. Over the coming year, the organisation will focus on the following objectives:

- A. Obtain AQS accreditation for Luton Roma Trust
- B. Diversify its sources of income and fundraising efforts
- C. Deliver Roma cultural awareness training to professionals in Luton and surrounding areas
- D. Advocate on behalf of the Roma community at both local and national levels
- E. Ensure that improving educational outcomes for the Roma community remains a central focus of all initiatives.
- F. Support and empower young Roma people in Luton to engage more actively in the organisation's work, while guiding them in progressing their education. Continue providing support to the Roma community by facilitating their way of life
- G. Continue empowering the Roma Community in Luton to lead their lives independently
- H. Increase the number of Roma Trustees and staff

IX. Risk Management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error.

The trustees are in constant communication with the Charity Manager who reports regularly on possible risks with a view to identify ways to overcome them.

The Trustees are aware of the risks that the charity faces and are in the process of updating the risk register in the coming year.

X. Administrative information

| | |
|---|--|
| Charity Full Name: | Luton Roma Trust |
| Correspondence Address: | Community House, 15 New Bedford Road, Luton LU1 1SA |
| Registered Charity Number: | 1202863 |
| Names of Trustees who served in the year: | as per section III above |
| Bank: | Barclays Bank |
| Legal Adviser: | Greystone Solicitors |
| Independent Examiner: | Martyn Burt, Adventus Accounting Solutions 10 Walnut Lane, Laceby, Grimsby DN37 7BY |
| Charity Manager | Crina Morteau |

Approved by order of the Board of Trustees on 15th April 2026 and signed on its behalf by



Rt Revd Richard Atkinson, OBE, Bishop of Bedford – LRT Chair of Trustees

9 April 2026

XI. Independent Examiner's report to the Trustees of Luton Roma Trust
Registered Charity Number 1202863

I report on the accounts for the period ended 31 August 2025 which are set out on the pages following.

Respective responsibilities of the Trustees and Independent Examiner

The charity trustees are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to

- Examine the accounts under section 145 of the 2011 Act;
- Follow the procedures laid down in the General Directions given by the Charity Commissioners section 145(5)(b) of the 2011 Act; and
- State whether particular matters have come to my attention.

Basis of Independent Examiner's Statement

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent Examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements
 - to keep accounting records in accordance with section 130 of the 2011 Act; or
 - to prepare accounts which accord with these accounting records have not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Yours sincerely



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Telephone: 07523 6229679

XII. Statement of Financial Activities

LUTON ROMA TRUST CIO 1202863
STATEMENT OF FINANCIAL ACTIVITIES
FOR THE 12 MONTH PERIOD ENDED 31st AUGUST 2025

| | Note | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2025 £ | Total Funds 2024 £ |
|------------------------------------|------|----------------------------|--------------------------|-----------------------------|-----------------------------|
| Income and endowments | | | | | |
| Voluntary income | 2 | 2,136 | 130,068 | 132,204 | 336,955 |
| Activities for generating funds | | - | - | - | |
| Investment income | | - | - | - | |
| Total income | | 2,136 | 130,068 | 132,204 | 336,955 |
| Expenditure | | | | | |
| Charitable activities | 3 | 17,159 | 140,086 | 157,245 | 188,418 |
| Total expenditure | | 17,159 | 140,086 | 157,245 | 188,418 |
| Net income/(expenditure) | | (15,023) | (10,018) | (25,041) | 148,537 |
| Transfers between funds | | - | - | - | 450 |
| | | (15,023) | (10,018) | (25,041) | 148,987 |
| Net movement in funds | | (15,023) | (10,018) | (25,041) | 148,987 |
| Reconciliation of funds: | | | | | |
| Total funds brought forward | | 50,621 | 98,366 | 148,987 | - |
| Total funds carried forward | | 35,598 | 88,348 | 123,946 | 148,987 |

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing operations.

The notes on the following pages form part of these accounts.

XIII. Balance Sheet

LUTON ROMA TRUST CIO 1202863

BALANCE SHEET

AS AT 31st AUGUST 2025

| | Note | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2025 £ | Total Funds 2024 £ |
|---|------|-------------------------|-----------------------|--------------------------|--------------------------|
| Fixed assets | | | | | |
| Tangible assets | 5 | - | - | - | - |
| Current Assets | | | | | |
| Debtors | 6 | - | 4,656 | 4,656 | 2,610 |
| Cash at bank and in hand | | 35,598 | 85,270 | 120,868 | 147,837 |
| | | 35,598 | 89,926 | 125,524 | 150,447 |
| Creditors: Amounts falling due within one year | 7 | - | (1,578) | (1,578) | (1,460) |
| Net current assets / (liabilities) | | 35,598 | 88,348 | 123,946 | 148,987 |
| Net Assets | | 35,598 | 88,348 | 123,946 | 148,987 |
| Funds | | | | | |
| Unrestricted Funds | | | | | |
| General funds | 8-10 | 34,806 | - | 34,806 | 49,780 |
| Designated funds | 8-10 | 792 | - | 792 | 841 |
| | | 35,598 | - | 35,598 | 50,621 |
| Restricted Funds | 8-10 | - | 88,348 | 88,348 | 98,366 |
| Total Funds | | 35,598 | 88,348 | 123,946 | 148,987 |

The financial statements were approved by the Board of Trustees on 15.4.26 and were signed on its behalf by:



[signature]

Rt Revd Richard Atkinson, OBE,
Bishop of Bedford – LRT Chair of Trustees

[name]

The notes on the following pages form part of these accounts.

XIV. Notes to the Accounts for the 12 Month Period Ended 31st August 2025

LUTON ROMA TRUST CIO 1202863
NOTES TO THE ACCOUNTS
FOR THE 12 MONTH PERIOD ENDED 31st AUGUST 2025

| 2 Voluntary Income | Unrestricted Funds £ | Restricted Funds £ | Total 2025 £ | Total 2024 £ |
|---|----------------------------|--------------------------|--------------------|--------------------|
| Gifts and donations | 1,576 | - | 1,576 | 1,586 |
| Grants | 560 | 130,068 | 130,628 | 186,870 |
| Transfer of Assets from Charity 1160404 | - | - | - | 148,499 |
| | <u>2,136</u> | <u>130,068</u> | <u>132,204</u> | <u>336,955</u> |

| 3 Charitable Activities | Unrestricted Funds £ | Restricted Funds £ | Total 2025 £ | Total 2024 £ |
|---|----------------------------|--------------------------|--------------------|--------------------|
| Employment Costs - Salaries/Employers NIC/Pension | 14,797 | 94,378 | 109,175 | 132,106 |
| Payroll Admin | 133 | 956 | 1,089 | 1,084 |
| Staff Expenses | - | 24 | 24 | 20 |
| Transport | 61 | 616 | 677 | 826 |
| Training | - | 385 | 385 | 612 |
| Postage, Print & Stationery | - | 307 | 307 | 1,241 |
| Rent | - | 23,380 | 23,380 | 20,024 |
| Property Cost | - | 867 | 867 | 149 |
| Insurance | - | 1,601 | 1,601 | 1,444 |
| Office costs | 783 | 4,687 | 5,470 | 3,837 |
| Administration | - | 1,897 | 1,897 | 3,669 |
| Management | - | 1,800 | 1,800 | 620 |
| Accountancy Cost | - | 840 | 840 | 800 |
| Operational Activity/Events | 885 | 7,883 | 8,768 | 21,632 |
| Other Costs | 500 | 465 | 965 | 300 |
| Trustee Expenses | - | - | - | 54 |
| Total Expenditure | <u>17,159</u> | <u>140,086</u> | <u>157,245</u> | <u>188,418</u> |

| 4 Analysis of Staff Costs | 2025 £ | 2024 £ |
|---------------------------|----------------|----------------|
| Wages and salaries | 103,042 | 127,597 |
| NIC Costs | 2,301 | - |
| Pension Costs | 3,832 | 4,509 |
| | <u>109,175</u> | <u>132,106</u> |

The average monthly number of employees during the year was:

5 5

The number of employees as FTE during the year was:

4.1 4.1

No employees received emoluments in excess of £60,000.

5 Tangible Fixed Assets

There were no tangible fixed assets (*prior year nil*)

6 Debtors

| | 2025 | 2024 |
|----------------------|---------------------|---------------------|
| | £ | £ |
| Debtors | 1,525 | |
| Payroll | 49 | |
| Prepaid Insurance | 992 | 939 |
| Prepaid Rates | 2,090 | 1,671 |
| Total Debtors | <u>4,656</u> | <u>2,610</u> |

LUTON ROMA TRUST CIO 1202863

NOTES TO THE ACCOUNTS (Continued)

FOR THE 12 MONTH PERIOD ENDED 31st AUGUST 2025

| | | | |
|----------|---|--------------|--------------|
| 7 | Creditors: liabilities falling due within one year | 2025 | 2024 |
| | | £ | £ |
| | Creditors | 238 | |
| | Pension Costs - NEST | 500 | 660 |
| | Fee to Independent Examiner | 840 | 800 |
| | Total Creditors | 1,578 | 1,460 |

8 Funds

During the year the movements in the charity's funds were as follows:

| | Opening balance 2025 £ | Incoming resources 2025 £ | Outgoing resources 2025 £ | Transfers in the year 2025 £ | Closing balance 2025 £ |
|--|---------------------------------|------------------------------------|------------------------------------|---------------------------------------|---------------------------------|
| <u>Unrestricted Funds</u> | | | | | |
| Tudor Trust | 22,733 | - | (14,978) | - | 7,755 |
| General Fund | 27,047 | 1,930 | (1,515) | (411) | 27,051 |
| <u>Designated Funds</u> | | | | | |
| Christmas Event | - | 206 | (617) | 411 | - |
| St Pauls Church | 841 | - | (49) | - | 792 |
| Total Unrestricted Funds | 50,621 | 2,136 | (17,159) | - | 35,598 |
| <u>Restricted Funds</u> | | | | | |
| The Tudor Trust - Well-being Fund | - | - | - | - | - |
| Luton Borough Council - Access to Health | - | - | - | - | - |
| BLCF - Community Recovery Fund | - | - | - | - | - |
| The National Lottery Community Fund | 92,184 | 51,614 | (105,776) | - | 38,022 |
| NHS BLMK (LRT & UoB) | - | - | - | - | - |
| Heriot-Watt University | 6,182 | 8,274 | (12,266) | - | 2,190 |
| Early Childhood (Allder Fund) | - | 32,693 | (12,009) | - | 20,684 |
| Mental Health | - | 6,487 | (4,316) | - | 2,171 |
| People's Postcode | - | 25,000 | (1,800) | - | 23,200 |
| Wixhamtree | - | 6,000 | (3,919) | - | 2,081 |
| Total Restricted Funds | 98,366 | 130,068 | (140,086) | - | 88,348 |
| Aggregate of Funds | 148,987 | 132,204 | (157,245) | - | 123,946 |

LUTON ROMA TRUST CIO 1202863

NOTES TO THE ACCOUNTS (Continued)

FOR THE 12 MONTH PERIOD ENDED 31st AUGUST 2025

The movements in the charity's funds for the prior year were as follows:

| | Opening balance 2024 £ | Incoming resources 2024 £ | Outgoing resources 2024 £ | Transfers in the year 2024 £ | Closing balance 2024 £ |
|--|---------------------------------|------------------------------------|------------------------------------|---------------------------------------|---------------------------------|
| <u>Unrestricted Funds</u> | | | | | |
| Tudor Trust | - | 49,307 | (26,574) | - | 22,733 |
| General Fund | - | 25,534 | (42) | 1,555 | 27,047 |
| <u>Designated Funds</u> | | | | | |
| St Pauls Church | - | 1,610 | (769) | - | 841 |
| Total Unrestricted Funds | - | 76,451 | (27,385) | 1,555 | 50,621 |
| <u>Restricted Funds</u> | | | | | |
| The Tudor Trust - Well-being Fund | - | 2,000 | (943) | (1,057) | - |
| Luton Borough Council - Access to Health | - | 6,436 | (6,388) | (48) | - |
| BLCF - Community Recovery Fund | - | 8,554 | (8,554) | - | - |
| The National Lottery Community Fund | - | 222,200 | (130,016) | - | 92,184 |
| NHS BLMK (LRT & UoB) | - | 10,037 | (10,037) | - | - |
| Heriot-Watt University | - | 11,277 | (5,095) | - | 6,182 |
| Total Restricted Funds | - | 260,504 | (161,033) | (1,105) | 98,366 |
| Aggregate of Funds | - | 336,955 | (188,418) | 450 | 148,987 |

9 Descriptions of Funds

Further details on funds can be found under III.
Financial review on page 11

Unrestricted Funds

The Tudor Trust

An unrestricted grant of £90,000 over 3 years from April 2021 for supporting the access of Roma children to school. The funding timeline was extended and during the reporting period the total funds spent were £14978 with the balance of £7755 spent early in 2025/26

Designated Funds

St Pauls Church (Tithe)

A designated fund of £1,500 from July 2024 to build deeper relationships with children and their families through arts and craft clubs and day trips.

Restricted Funds

The National Lottery Community Fund (2022-2025)

A grant of £373,853 over three years from November 2022 to October 2025. During the reporting period the total funds received by the CIO was £51,614 and funds spent were £105,776.

LUTON ROMA TRUST CIO 1202863

NOTES TO THE ACCOUNTS (Continued)

FOR THE 12 MONTH PERIOD ENDED 31st AUGUST 2025

10 Analysis of net assets by fund

| | <u>Unrestricted Funds</u> | | Restricted Funds | 2025 |
|---------------------|---------------------------|------------------|------------------|----------------|
| | General Funds | Designated Funds | | |
| | £ | £ | £ | £ |
| Fixed assets | - | - | - | - |
| Current assets | 34,806 | 792 | 89,926 | 125,524 |
| Current liabilities | - | - | (1,578) | (1,578) |
| | 34,806 | 792 | 88,348 | 123,946 |

Analysis of net assets by fund for the prior period

| | <u>Unrestricted Funds</u> | | Restricted Funds | 2024 |
|---------------------|---------------------------|------------------|------------------|----------------|
| | General Funds | Designated Funds | | |
| | £ | £ | £ | £ |
| Fixed assets | - | - | - | - |
| Current assets | 49,780 | 841 | 99,826 | 150,447 |
| Current liabilities | - | - | (1,460) | (1,460) |
| | 49,780 | 841 | 98,366 | 148,987 |

11 Transactions with Related Parties, Trustee Benefits and Expenses

During the period ended 31st August 2025, expenses totalling £55 were reimbursed or paid directly to 2 Trustees

XV. Annex – Statement of Financial activities for the LRT Charity 1160404

ANNEX

Until 31 August 2023 the Luton Roma Trust operated as a Registered Charity no 1160404

All assets and liabilities were transferred to a new Charitable Incorporated Organisation no 1202863 on that date

These pages following show summary financial details of the Registered Charity for the period 1 September 2022 until 31 August 2023 and are presented in this annex for information only but do not represent part of the statutory accounts

LUTON ROMA TRUST CHARITY NUMBER 1160404

STATEMENT OF FINANCIAL ACTIVITIES

FOR THE YEAR ENDED 31st AUGUST 2023

| | Note | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2023 £ |
|------------------------------------|------|----------------------------|--------------------------|-----------------------------|
| Income and endowments | | | | |
| Voluntary income | A1 | 31,511 | 203,065 | 234,576 |
| Activities for generating funds | | - | - | - |
| Investment income | | - | - | - |
| Total income | | 31,511 | 203,065 | 234,576 |
| Expenditure | | | | |
| Charitable activities | A2 | 24,058 | 127,179 | 151,240 |
| Total expenditure | | 24,058 | 127,179 | 151,240 |
| Net income/(expenditure) | | 7,453 | 75,886 | 83,339 |
| Transfers between funds | | 1,250 | (1,250) | - |
| | | 8,703 | 74,636 | 83,339 |
| Net movement in funds | | 8,703 | 74,636 | 83,339 |
| Reconciliation of funds: | | | | |
| Total funds brought forward | | 50,662 | 14,498 | 65,160 |
| Total funds carried forward | | 59,365 | 89,134 | 148,499 |

THESE FUNDS WERE TRANSFERRED TO CIO NO 12022863 ON 31 AUGUST 2023

LUTON ROMA TRUST CHARITY NUMBER 1160404

BALANCE SHEET

AS AT 31 AUGUST 2023

| | Note | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2023 £ |
|---|------|----------------------------|--------------------------|-----------------------------|
| Fixed assets | | | | |
| <i>Tangible assets</i> | | - | - | - |
| Current Assets | | | | |
| <i>Debtors</i> | A3 | 136 | 712 | 848 |
| <i>Cash at bank and in hand</i> | | 59,229 | 89,671 | 148,900 |
| | | <u>59,365</u> | <u>90,383</u> | <u>149,748</u> |
| Creditors: Amounts falling due within one year | A4 | - | (1,249) | (1,249) |
| Net current assets / (liabilities) | | <u>59,365</u> | <u>89,134</u> | <u>148,499</u> |
| Net Assets | | <u><u>59,365</u></u> | <u><u>89,134</u></u> | <u><u>148,499</u></u> |
| Funds | | | | |
| <i>Unrestricted Funds</i> | A5 | 59,365 | - | 59,365 |
| <i>Restricted Funds</i> | A5 | - | 89,134 | 89,134 |
| Total Funds | | <u><u>59,365</u></u> | <u><u>89,134</u></u> | <u><u>148,499</u></u> |

LUTON ROMA TRUST CHARITY NUMBER 1160404

ADDITIONAL NOTES TO THE ACCOUNTS

FOR THE YEAR ENDED 31st AUGUST 2023

| Voluntary Income | Unrestricted Funds £ | Restricted Funds £ | Total 2023 £ |
|------------------------------|-------------------------------------|-----------------------------------|-----------------------------|
| Gifts | 1,511 | - | 1,511 |
| Grants | 30,000 | 203,065 | 233,065 |
| | <u>31,511</u> | <u>203,065</u> | <u>234,576</u> |
| | | | |
| Charitable Activities | Unrestricted Funds £ | Restricted Funds £ | Total 2023 £ |
| Employment Costs | 19,214 | 86,147 | 105,361 |
| Payroll Admin | 218 | 637 | 855 |
| Staff Expenses | 20 | 115 | 135 |
| Transport | 57 | 392 | 449 |
| Training | 71 | - | 71 |
| Postage, Print & Stationery | - | 788 | 788 |
| Rent | (2,365) | 16,797 | 14,433 |
| Property Cost | 1,604 | 2,683 | 4,287 |
| Insurance | 218 | 1,130 | 1,348 |
| Office | 735 | 3,206 | 3,941 |
| Administration | 2,969 | 2,870 | 5,839 |
| Accountancy Cost | - | 475 | 475 |
| Operational Activity/Events | 608 | 11,366 | 11,974 |
| Other Costs | 641 | 573 | 1,216 |
| Trustee Expenses | 68 | - | 68 |
| Total Expenditure | <u>24,058</u> | <u>127,179</u> | <u>151,240</u> |

LUTON ROMA TRUST CHARITY NUMBER 1160404

ADDITIONAL NOTES TO THE ACCOUNTS

FOR THE YEAR ENDED 31st AUGUST 2023 (Continued)

| | |
|----------------------|------------|
| Debtors | 2023 |
| | £ |
| Prepaid Insurance | 848 |
| Total Debtors | 848 |

| | |
|---|--------------|
| Creditors: liabilities falling due within one year | 2023 |
| | £ |
| Pension Costs - NEST | 554 |
| Rates | 220 |
| Fee to Independent Examiner | 475 |
| Total Creditors | 1,249 |

| Funds | Opening balance 2023 £ | Incoming resources 2023 £ | Outgoing resources 2023 £ | Transfers in the year 2023 £ | Closing balance 2023 £ |
|--|---------------------------------|------------------------------------|------------------------------------|---------------------------------------|---------------------------------|
| <u>Unrestricted Funds</u> | | | | | |
| Tudor Trust | 27,046 | 30,000 | (21,739) | - | 35,307 |
| General Fund | 23,616 | 1,511 | (2,319) | 1,250 | 24,058 |
| Total Unrestricted Funds | 50,662 | 31,511 | (24,058) | 1,250 | 59,365 |
| <u>Restricted Funds</u> | | | | | |
| BLCF - Stability Fund | (4,798) | 12,000 | (7,202) | - | - |
| BLCF - Citizen's Fund | 3,450 | - | (2,200) | (1,250) | - |
| The Tudor Trust - Well-being Fund | 2,000 | - | - | - | 2,000 |
| Luton Borough Council - Access to Health | 4,500 | 4,500 | (2,564) | - | 6,436 |
| BLCF - Community Recovery Fund | 9,346 | - | (3,138) | - | 6,208 |
| BLCF - Rent Costs | - | 2,000 | (2,000) | - | - |
| The National Lottery Community Fund | - | 164,492 | (100,039) | - | 64,453 |
| NHS BLMK (LRT & UoB) | - | 20,073 | (10,036) | - | 10,037 |
| Total Restricted Funds | 14,498 | 203,065 | (127,179) | (1,250) | 89,134 |
| Aggregate of Funds | 65,160 | 234,576 | (151,237) | - | 148,499 |

Further details on the Luton Roma Trust charity number 1160404 can be obtained by contacting the Luton Roma Trust at Community House 15 New Bedford Road Luton LU1 1SA Telephone 01582 510709 or email office@lutonromatrust.org.uk

LUTON ROMA TRUST

England & Wales - Charity number 1202863

Accounts



**REPORT OF THE TRUSTEES AND FINANCIAL STATEMENTS
FOR THE YEAR ENDING 31 AUGUST 2024
FOR
LUTON ROMA TRUST**

REGISTERED CHARITY NUMBER: 1202863 (ENGLAND AND WALES)



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

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REPORT OF THE TRUSTEES

Reporting period: 27th April 2023 to 31st August 2024

The Trustees present their report including the financial statements of the charity for the year ended on 31 August 2023. The Trustees have adopted the provisions of the Statement of Recommended Practice (SORP) 'Accounting and Reporting by Charities' issued in March 2005.

I. Aims and Purposes

The overall aim of Luton Roma Trust is to promote social inclusion for the benefit of the Roma people and the general public in Luton and surrounding areas by preventing them from becoming socially excluded and assisting them with social integration.

II. Objectives and Activities

The general objectives of Luton Roma Trust are:

1. To raise the economic status of the Roma by supporting the community to obtain the skills needed in order to secure employment
2. To facilitate Roma's access to welfare services, health care and accommodation
3. To ensure Roma children's right to quality education
4. To increase Roma children's self-esteem and support the development of a whole new generation of Roma intellectuals who can then become role models for others
5. To work in partnership with statutory bodies in Luton (and at national level) in order to ensure services provided are adapted to the needs of the Roma community
6. To support the Roma community as they obtain their residency status in the United Kingdom as a result of Brexit

III. Achievements and Performance

During the reporting period, Luton Roma Trust has accomplished the following:

1. Change of its status from an unincorporated charity to a Charity Incorporated Organisation (CIO)
2. A new report on Access to Health for the Roma Community in Luton released in April 2024
3. Raised awareness about the barriers that Roma face in access to any type of services, and specifically in relation to healthcare based on the findings of the report
4. Continued provision of advice service to the Roma community in all vital aspects of their lives

1. Change of Status

In April 2023, Luton Roma Trust became a Charity Incorporated Organisation. This has allowed Luton Roma Trust to extend its services to the surroundings of Luton including Bedford where it intends to extend the provision of its services to the Roma community. Although, no activities have been implemented within the reporting period, Luton Roma Trust made contact with an important funder who is willing to support the implementation of a project on education. The extension of services to other areas in Bedfordshire depends on the capacity of the team and



funding available and this is something we are currently working on. We are hopeful we will be able to start working in Bedford in 2025.

2. Release of a new report on access to health for the Roma community in Luton

The report, released in April 2024, was completed in partnership with the University of Bedfordshire and was commissioned by NHS [Bedfordshire, Luton and Milton Keynes Integrated Care Board](#) (BLMK ICB) as part of the [Denny Review](#) into health inequalities. The study was undertaken over 12 months and included interviews and focus groups with Roma people in Luton. The report highlighted that there are multiple barriers facing Roma people in accessing health and care services, including language and communications, knowledge of how the health system works, and limited digital literacy. The research, further, revealed a lack of understanding of Roma people in health settings, perceived discrimination and a mistrust of authorities. These aspects combined have left a gap in provision of medical healthcare, leading many Roma people to return to their home countries to access health services, contributing to delays in treatment and in many cases, worse health outcomes than other minority groups.

The report, which is the first one in the region, has had a great impact among the stakeholders in Luton. Since April 2024, Luton Roma Trust has started working closely with the BLMK and Luton Council on designing Roma cultural awareness workshops to be delivered to health professionals around Luton. We aim to start implement these workshops in 2025.

3. Continuation of providing advice service to the Roma community

Providing holistic support to the Roma community in Luton has remained vital as most of them continue to be reliant upon Luton Roma Trust in their social integration journey. Between April 2023 and August 2024, Luton Roma Trust has supported, holistically, the Roma community in the town in eleven areas including: Residency under the EU Settlement Scheme, Documentation, Work, Welfare, Accommodation, Education, Health and Well-Being, Support and Integration, Debts/Fines/Court, and Food Bank.

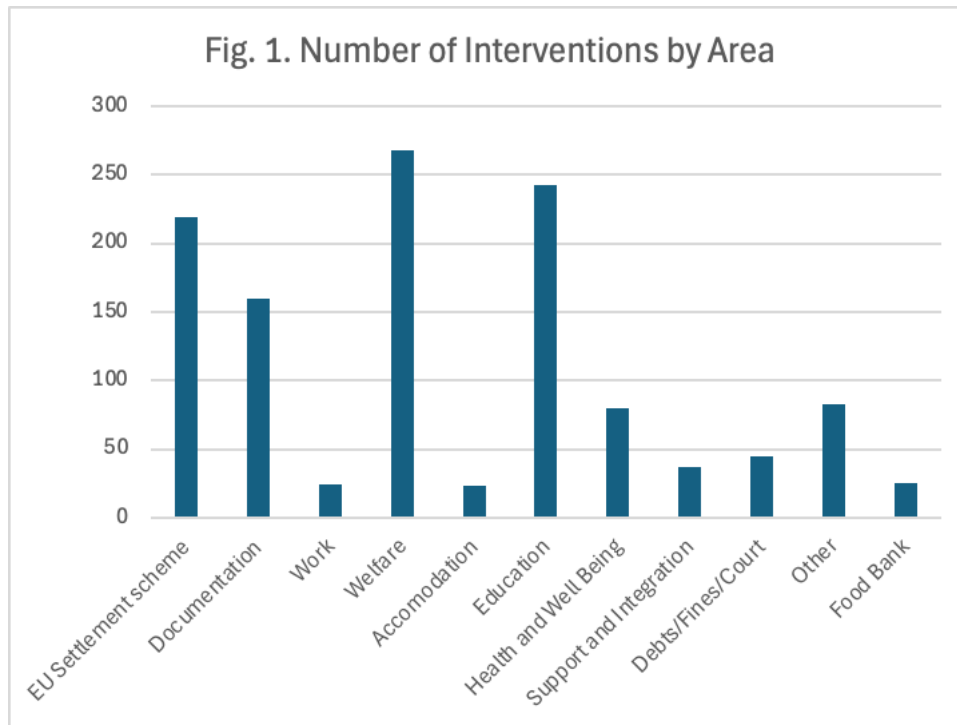
Within these areas, Education and Welfare has occupied the first place within the highest number of interventions being carried out. In the Education area, we supported 243 children with making school applications and mentoring. We facilitated the relationship between children, their parents and schools around Luton by interpreting over the phone or during evening/individual meetings with school staff. In addition, Roma families were assisted in sourcing school uniforms and making applications for Free Schools Meals where appropriate. Luton Roma Trust advocated before the schools and raised awareness about Roma children's vulnerabilities as migrants in the United Kingdom.

In the Welfare area, we have supported a further 268 Roma families. Due to lack of English language and digital skills, combined with poor understanding of the welfare system, most Roma families are unable to apply for Universal credit or manage their Universal credit account. Hence, they rely on Luton Roma Trust in this regard. Most of the interventions in this area were in relation to accessing benefits or support with managing their Universal Credit account.

The other areas of advice provided included health and well-being (80), debts/fines/court (45), Foodbank (25), Support and Integration (37), Other (83), Accommodation (23), Work (24). The chart below shows the impact of our support in each area of intervention.

It is, however, important to mention that these numbers exclude advice we provided informally to the community either through social media channels or in informal settings such as when

meeting on the street. Luton Roma Trust estimates that on at least fifty occasions, advice was provided in informal settings.



4. Advocacy

During the reporting period, Luton Roma Trust has continued to advocate on behalf of the Roma community by raising awareness at both local and national levels about their culture and needs. Alongside this we have championed the importance of working together (charities and local stakeholders) to better support their social integration.

We continued working with Maternity Voices Partnership by organising regular workshops with Roma women. This was an opportunity for maternity specialists to understand the challenges of providing services to the Roma women and the needs that Roma women have. It also allowed learning about how to design maternity services so that they are accessible for everyone including the Roma.

These workshops have also been an opportunity for Roma women to better understand the system, make connections, get answers to their questions in this area and explain the challenges they have as being both migrants but also Roma women. In total, around 30 Roma women benefited from these workshops.

During the reporting period, we also delivered two presentations on Roma culture and challenges faced by it at Luton Town Hall in June 2023 and June 2024 as part of the GRT History Month. These sessions have helped the Council staff familiarise themselves even more with who the Roma are.



III. Financial Review

During 27th April 2023 – 31 August 2024, LRT had four major sources of income: The Tudor Trust, The National Community Fund (the Big Lottery), Bedfordshire and Luton Community Foundation, and Luton Borough Council.

The Tudor Trust an unrestricted grant of £90,000 over 3 years from April 2021 for supporting the access of Roma children to school. During the reporting period the total funds received by the CIO was £49,307 - the amount of £44,000 came directly to the CIO and £35,307 was received within the transfer of assets. A total amount of £20,619 was used towards covering Roma Education Champion's salary. A further £12,594 was spent on support costs and operational activities and events.

The National Lottery Community Fund a restricted grant of £373,853 over three years from November 2022 to October 2025. During the reporting period the total funds received by the CIO was £222,200 - the amount of £157,747 came directly to the CIO and £64,453 was received within the transfer of assets. A total spend of £134,453 was used towards covering the running cost of the charity including salaries for the Charity Manager, Operations Manager, Support and Empowerment Officer, Support Officer, Roma Woman Champion, Charity Administrator and Finance Officer.

Bedfordshire & Luton Community Foundation (Community Recovery Fund) a restricted grant of £27,346 from April 2022 to March 2024 for a Roma Woman Champion to work closely with Roma women in the community to ensure they have access to information and tools, to empower them and help them access success.

Unfortunately, due to challenges in recruiting a suitable candidate in the first year, Luton Roma Trust only received the equivalent to year one grant (£11,692). During the reporting period the total funds received by the CIO was £8,554 – the amount of £2,346 came directly to the CIO and £6,208 was received within the transfer of assets. The grant covered the salary costs of a Roma Women's Champion for eight months in the second year.

NHS BLMK (Bedfordshire Luton Milton Keynes Integrated Care Board) a restricted grant of £20,073 from January 2023 to July 2023, extended to January 2024 for the Luton Roma Trust in partnership with University of Bedfordshire to carry out an assessment of the access to healthcare needs of the Luton Roma community. During the reporting period the total funds received by the CIO was £10,037, which came directly to the CIO.

The Tudor Trust (Well-being Fund) a restricted grant of £2,000 for staff and trustees to use for a retreat/team-building event. During the reporting period the total funds received by the CIO was £2,000, which was received within the transfer of assets. £943 has been spent on two staff away days, and an underspend of £1057 was transferred to general fund to be used for a further away day in 2025.

Luton Borough Council a restricted grant of £9,000 from April 2022 to July 2022 to increase Covid vaccination amongst the Roma community. Extended to October 2023 as a wider Access to Health project. During the reporting period the total funds received by the CIO was £6,436, which was received within the transfer of assets. £6,388 has been spent on activities and workshops, and an underspend of £48 was transferred to reserves.



Heriot-Watt University a restricted grant of £33,832 from February 2024 to January 2027 to work on implementing a project in regards of Roma people's healthy ageing. The main funder of the project is UK Research Council who has awarded Heriot Watt University, as the project manager, a total of £1.1. million to identify barriers faced by Roma people in accessing healthcare and other services in mid to later life. The project will then co-design new place-based 'Integrated Hubs' to better connect Roma people with culturally appropriate health, wellbeing and community resources which build upon existing expertise and assets within the community.

Luton Roma Trust's role in this project, is to facilitate the collection of data in Luton as well as to co-contribute to designing effective ways of improving the health situation of the Roma people in the UK. More on this project can be found at: <https://www.hw.ac.uk/news-archive/2024/major-new-research-to-tackle-health.htm>

During the reporting period the total funds received by the CIO was £11,277, which came directly to the CIO and has been used towards salary and associated costs.

St Paul's Church, St Albans a designated fund of £1,500 from July 2024 to build deeper relationships with children and their families through arts and craft clubs and day trips. During the reporting period the total funds received by the CIO was £1,500, which came directly to the CIO. £769 has been spent on a day trip to the zoo and art clubs.

IV. Reserves Policy

The trustees have considered the requirements for a reserves policy and reviewed the level of reserves held and have determined that an amount equivalent to 3 months regular income would be sufficient as free reserves. Based upon this information would mean an amount of around £40,000 is kept as free reserves. At the end of the year the level of free reserves was £25,534, which is significantly below the stated reserve level. However, there is a further £22,733 held in unrestricted funds, some of which can be spent on activities and events that might need to be funded by reserves.

The Trustees are aware that the reserve level is below the stated reserve level, and they will address this in the next year.

V. Plans for the Future

The Trustees are constantly looking for ways to maintain the long-term viability of the charity and note it as an ongoing concern. The charity is in a position to continue implementing its mission for seven months after the end date of the report. Plans for future include:

- A. Revise the Delivery Plan 2022 – 20225 in line with its change of status and implement all the activities in it
- B. Enhance its fundraising activities in order to diversify its sources which in return will bring long term stability to the charity.
- C. Extend Luton Roma Trust's work outside of Luton in light of its change of status
- D. Continue providing support to the Roma community by facilitating their way of life
- E. Continue empowering the Roma Community in Luton to lead their lives independently
- F. Continue advocating on behalf of the Roma community at both local and national levels
- G. Increase the number of Roma staff in the team
- H. Obtain AQS accreditation for Luton Roma Trust



VI. Risk Management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error.

The trustees are in constant communication with the Charity Manager who reports regularly on possible risks with a view to identify ways to overcome them.

The Trustees are aware of the risks that the charity faces and are in the process of updating the risk register in the coming year.

VII. Structure, Governance and Management

The charity is controlled by its Constitution and constitutes a Charity Incorporated Organisation (CIO).

A Board of Trustees governs Luton Roma Trust. The Chair of the Board is Rt. Revd Richard Atkinson, OBE Bishop of Bedford who is also one of the co-founders of Luton Roma Trust. During the reporting period, the treasurer was Gavin Williams, a charity accountant. He, however, resigned on 31 October 2024, and the change was recorded on the Charity Commission account.

The other members of the Board include:

Revd Martin Burrell – Co-founder of Luton Roma Trust

Revd Canon Liz Hughes – London Luton Airport's Chaplain

John Barr – an English Romani with lived experience

Valdemar Kalinin – a Romani poet and writer

Dr Helen Connolly – Associate Professor at Bedfordshire University and an expert in children's rights

Crina Morteau continued to be the Charity Manager. Crina has worked closely with the Board of Trustees on implementing the strategic and organisational vision of the charity.

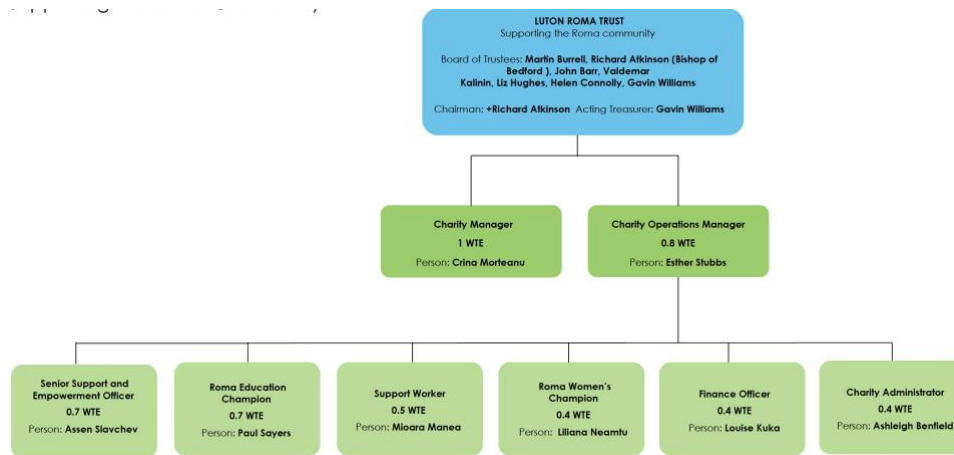
In January 2023, Luton Roma Trust recruited a Compliance officer to ensure charity compliance with the rules and regulations in place. However, due to changes in the working number of hours of the Charity Manager, the Compliance Officer took over the supervision of the staff until June 2024. Its title was changed to Charity Operations Manager. In June 2024, the Charity Operations Manager sadly suddenly passed away. The Charity Manager temporarily took over the supervision of staff until a new person was recruited into the position of Charity Operations Manager. Mrs. Esther Stubbs, a Romani academic and an advocate of Gypsy, Roma, Travellers rights is the Charity Operations Manager, and she started working with Luton Roma Trust on the 27th of September 2024.

The below chart shows the different levels of management at Luton Roma Trust and staff include Senior Support and Empowerment Officer, Roma Education Champion, Roma Woman Champion, Support Officer, Charity Administrator and Financial Officer.



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024



VIII. Administrative information

Charity Full Name: Luton Roma Trust

Correspondence Address: Community House, 15 New Bedford Road,
Luton
LU1 1SA

Registered Charity Number: 1202863

Names of Trustees who served in the year: as per section VIII above

Bank: Barclays Bank

Legal Adviser: Greystone Solicitors, Bates & Wells

Independent Examiner: Martyn Burt, Adventus Accounting Solutions
Ashby Acres, Chapel Lane, Ashby-cum-Fenby,
Grimsby DN37 0QT

Charity Manager: Crina Morteau

Charity Operations Manager: Esther Stubbs

Approved by order of the Board of Trustees on 3rd of December 2024 and signed on its behalf by

Rt Revd Richard Atkinson, OBE, Bishop of Bedford – LRT Chair of Trustees



adventus accounting solutions

Supporting Charitable Organisations

21 January 2025

Independent Examiner's report to the Trustees of Luton Roma Trust **Registered Charity Number 1202863**

I report on the accounts for the period ended 31 August 2024 which are set out on the pages following.

Respective responsibilities of the Trustees and Independent Examiner

The charity trustees are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to

- Examine the accounts under section 145 of the 2011 Act;
- Follow the procedures laid down in the General Directions given by the Charity Commissioners section 145(5)(b) of the 2011 Act; and
- State whether particular matters have come to my attention.

Basis of Independent Examiner's Statement

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent Examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements
 - to keep accounting records in accordance with section 130 of the 2011 Act; or
 - to prepare accounts which accord with these accounting records have not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Yours sincerely

Martyn Burt B.Sc.(Hons), ACMA, CGMA adventus accounting solutions
Ashby Acres Chapel Lane Ashby-cum-Fenby Grimsby DN37 0QT
e-mail: martyn.burt@btinternet.com or adventusaccounting@btinternet.com
Telephone: 07523 6229679



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

LUTON ROMA TRUST CIO 1202863
STATEMENT OF FINANCIAL ACTIVITIES
FOR THE 16 MONTH PERIOD ENDED 31st AUGUST 2024

| | Note | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2024 £ |
|------------------------------------|------|----------------------------|--------------------------|-----------------------------|
| Income and endowments | | | | |
| Voluntary income | 2 | 76,451 | 260,504 | 336,955 |
| Activities for generating funds | | - | - | - |
| Investment income | | - | - | - |
| Total income | | 76,451 | 260,504 | 336,955 |
| Expenditure | | | | |
| Charitable activities | 3 | 27,385 | 161,033 | 188,418 |
| Total expenditure | | 27,385 | 161,033 | 188,418 |
| Net income/(expenditure) | | 49,066 | 99,471 | 148,537 |
| Transfers between funds | | 1,555 | (1,105) | 450 |
| | | 50,621 | 98,366 | 148,987 |
| Net movement in funds | | 50,621 | 98,366 | 148,987 |
| Reconciliation of funds: | | | | |
| Total funds brought forward | | - | - | - |
| Total funds carried forward | | 50,621 | 98,366 | 148,987 |

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing operations.

The notes on the following pages form part of these accounts.



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

LUTON ROMA TRUST CIO 1202863

BALANCE SHEET

AS AT 31st AUGUST 2024

| | Note | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2024 £ |
|---|------|----------------------------|--------------------------|-----------------------------|
| Fixed assets | | | | |
| Tangible assets | 5 | - | - | - |
| Current Assets | | | | |
| Debtors | 6 | - | 2,610 | 2,610 |
| Cash at bank and in hand | | 50,621 | 97,216 | 147,837 |
| | | 50,621 | 99,826 | 150,447 |
| Creditors: Amounts falling due within one year | 7 | - | (1,460) | (1,460) |
| Net current assets / (liabilities) | | 50,621 | 98,366 | 148,987 |
| Net Assets | | <u>50,621</u> | <u>98,366</u> | <u>148,987</u> |
| Funds | | | | |
| Unrestricted Funds | | | | |
| General funds | 8-10 | 49,780 | - | 49,780 |
| Designated funds | 8-10 | 841 | - | 841 |
| | | 50,621 | - | 50,621 |
| Restricted Funds | 8-10 | - | 98,366 | 98,366 |
| Total Funds | | <u>50,621</u> | <u>98,366</u> | <u>148,987</u> |

The financial statements were approved by the Board of Trustees on behalf by:

3 December 2024 and were signed on its

[signature]

Rt Revd Richard Atkinson, OBE,
Bishop of Bedford – LRT Chair of Trustees

[name]

The notes on the following pages form part of these accounts.



LUTON ROMA TRUST CIO 1202863

NOTES TO THE ACCOUNTS

FOR THE PERIOD ENDED 31 AUGUST 2024

1. ACCOUNTING POLICIES

Accounting convention

The charity is a public benefit entity within the meaning of FRS102. The financial statements have been prepared under the historical cost convention, and in accordance with the Financial Reporting Standard for Smaller Entities (effective April 2008), the Charities Act 2011 and the requirements of the Statement of Recommended Practice, Accounting and Reporting by Charities (SORP(FRS102)).

Going concern

The charity trustees have assessed whether the use of the going concern basis is appropriate and have considered possible events or conditions that might cast significant doubt on the ability of the charity to continue as a going concern. The trustees have made this assessment for a period of at least one year from the date of approval of the financial statements. In particular the trustees have considered the charity's forecasts and projections and the possible implications should projected income and/or expenditure vary unexpectedly. The trustees have concluded that there is a reasonable expectation that the charity has adequate resources to continue to operate for the foreseeable future. The charity therefore continues to adopt the going concern basis in preparing its financial statements.

Incoming resources

All incoming resources are included on the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy.

Income (which includes grants received, giving, collections and other donations) is recognised in the period in which the charity becomes entitled to the receipt, the amount receivable can be measured with reasonable certainty, and receipt is probable. For the most part income is generally recognised when it is received by, or on behalf of, the charity. Income is only deferred when the charity has to fulfil conditions before becoming entitled to it or where the donor has specified that the income is to be expended in a future period.

Income from donations includes:

- i) Recoverable gift aid. This is recognised when the related donation is received. Gift aid that has not been recovered by the balance sheet date is included as a debtor.
- ii) Donated facilities, services and goods. Goods donated for distribution to beneficiaries are recognised as income when receivable at fair value (being an estimate of the amount it would cost to purchase those items). Facilities, services and goods donated for the charity's own use are recognised as income when receivable at their value to the charity.

When donated goods, services and facilities are distributed or consumed, an expense in respect of those items is included in the Statement of Financial Activities. At the year-end any goods that have not been distributed or consumed are recognised as stock; donated fixed assets are capitalised.



Income from charitable activities represents income receivable from goods, services and facilities supplied in furtherance of the charity's charitable objects.

Income from other trading activities represents income receivable from activities undertaken to generate funds for the charity. It includes income from reimbursement of staff time on secondment.

Resources expended

Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings, they have been allocated to activities on a basis consistent with the use of resources.

Expenditure, including irrecoverable VAT, is recognised when it is incurred or, if earlier, when a legal or constructive obligation for a payment arises provided that it is probable that settlement will be required, and the amount of the obligation can be measured reliably.

The charity may make grants to other institutions and individuals to further its charitable objectives. Grants payable are recognised as constructive obligations arise, which is generally when the charity expresses a commitment to the recipient that can be measured reliably and then only to the extent that any conditions associated with the grant are outside of the control of the charity.

The cost of raising funds is not significant and has not been separately disclosed.

Governance costs, which are included in expenditure on charitable activities but are identified separately in the notes to the accounts, include costs associated with the independent examination of the financial statements, compliance with constitutional and statutory requirements and any other expenditure incurred on the strategic management of the charity incurred by the trustees.

Taxation

The charity is exempt from Corporation Tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

Tangible fixed assets

Items purchased or donated for the charity's own use are capitalised when the cost of purchased items, or the fair value of donated items, is more than £1,000 and the item is expected to benefit the charity over more than one accounting period. Depreciation is charged on a straight-line basis to write down the value of each asset to its estimated residual value (if any) over its expected useful economic life. To achieve this objective the following rates of depreciation are charged:



| | |
|--|----------|
| Buildings and Property | 20 years |
| Motor Vehicles | 5 years |
| Computer and Office Equipment | 4 years |
| Other Capitalised Assets (eg catering equipment) | 4 years |

Investments

Fixed asset investments may be held to generate income and/or for their investment potential. Current asset investments are investments that are held specifically for sale or are investments that the charity expects to sell by the next balance sheet date. Investments, other than social investments (see below), are valued as follows:

- i) Any investment property and listed investments are valued at their market value (fair value) at the balance sheet date.
- ii) Unlisted investments are measured at cost less impairment where it becomes apparent that the amount that could be realised is less than cost.

Stocks

Any stocks of donated items held for distribution to beneficiaries are measured at fair value.

Hire purchase and leasing commitments

Leases which do not transfer substantially all the risks and rewards of ownership to the charity are classified as operating leases. Operating lease payments are recognised as an expense on a straight-line basis over the lease term (unless another systematic basis is more representative of use) and any rentals paid under operating leases are charged to the Statement of Financial Activities on that basis over the period of the lease.

Pension costs and other post-retirement benefits

The charity operates a defined contribution pension scheme for its employees. Contributions payable to the charity's pension scheme are charged to the Statement of Financial Activities in the period to which they relate. The assets of these schemes are held separately from those of the charity in independently administered funds (currently with NEST).



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

LUTON ROMA TRUST CIO 1202863

NOTES TO THE ACCOUNTS

FOR THE 16 MONTH PERIOD ENDED 31st AUGUST 2024

| 2 Voluntary Income | Unrestricted Funds £ | Restricted Funds £ | Total 2024 £ |
|---|----------------------------|--------------------------|--------------------|
| Gifts | 1,586 | - | 1,586 |
| Grants | 15,500 | 171,370 | 186,870 |
| Transfer of Assets from Charity 1160404 | 59,365 | 89,134 | 148,499 |
| | <u>76,451</u> | <u>260,504</u> | <u>336,955</u> |

| 3 Charitable Activities | Unrestricted Funds £ | Restricted Funds £ | Total 2024 £ |
|---|----------------------------|--------------------------|--------------------|
| Employment Costs - Salaries/Employers NIC/Pension | 21,281 | 110,825 | 132,106 |
| Payroll Admin | 146 | 938 | 1,084 |
| Staff Expenses | - | 20 | 20 |
| Transport | 291 | 535 | 826 |
| Training | 90 | 522 | 612 |
| Postage, Print & Stationery | - | 1,241 | 1,241 |
| Rent | - | 20,024 | 20,024 |
| Property Cost | - 512 ¹ | 661 | 149 |
| Insurance | - | 1,444 | 1,444 |
| Office | 249 | 3,588 | 3,837 |
| Administration | - | 3,669 | 3,669 |
| Management | - | 620 | 620 |
| Accountancy Cost | - | 800 | 800 |
| Operational Activity/Events | 5,786 | 15,846 | 21,632 |
| Other Costs | - | 300 | 300 |
| Trustee Expenses | 54 | - | 54 |
| Total Expenditure | <u>27,385</u> | <u>161,033</u> | <u>188,418</u> |

NOTES

¹ Due to a rebate from Luton Borough Council for Non-domestic rates and Bid Levy from previous property

| 4 Analysis of Staff Costs | 2024 £ |
|---------------------------|----------------|
| Wages and salaries | 127,597 |
| NIC Costs | - |
| Pension Costs | 4,509 |
| | <u>132,106</u> |

The average monthly number of employees during the year was: 5

The number of employees as FTE during the year was: 4.1

No employees received emoluments in excess of £60,000.



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

5 Tangible Fixed Assets

There were no tangible fixed assets (*prior year nil*)

6 Debtors

| | 2024 £ |
|----------------------|--------------|
| Prepaid Insurance | 939 |
| Prepaid Rates | 1,671 |
| Total Debtors | 2,610 |

7 Creditors: liabilities falling due within one year

| | 2024 £ |
|-----------------------------|--------------|
| Pension Costs - NEST | 660 |
| Fee to Independent Examiner | 800 |
| Total Creditors | 1,460 |

8 Funds

During the year the movements in the charity's funds were as follows:

| | Opening balance 2024 £ | Incoming resources 2024 £ | Outgoing resources 2024 £ | Transfers in the year 2024 £ | Closing balance 2024 £ |
|--|---------------------------------|------------------------------------|------------------------------------|---------------------------------------|---------------------------------|
| <u>Unrestricted Funds</u> | | | | | |
| Tudor Trust | - | 49,307 | (26,574) | - | 22,733 |
| General Fund | - | 25,534 | (42) | 1,555 | 27,047 |
| <u>Designated Funds</u> | | | | | |
| St Pauls Church | - | 1,610 | (769) | - | 841 |
| Total Unrestricted Funds | - | 76,451 | (27,385) | 1,555 | 50,621 |
| <u>Restricted Funds</u> | | | | | |
| The Tudor Trust - Well-being Fund | - | 2,000 | (943) | (1,057) | - |
| Luton Borough Council - Access to Health | - | 6,436 | (6,388) | (48) | - |
| BLCF - Community Recovery Fund | - | 8,554 | (8,554) | - | - |
| The National Lottery Community Fund | - | 222,200 | (130,016) | - | 92,184 |
| NHS BLMK (LRT & UoB) | - | 10,037 | (10,037) | - | - |
| Heriot-Watt University | - | 11,277 | (5,095) | - | 6,182 |
| Total Restricted Funds | - | 260,504 | (161,033) | (1,105) | 98,366 |
| Aggregate of Funds | - | 336,955 | (188,418) | 450 | 148,987 |



9 Descriptions of Funds

Further details on funds can be found under IV. Financial review on page

Unrestricted Funds

The Tudor Trust

An unrestricted grant of £90,000 over 3 years from April 2021 for supporting the access of Roma children to school. During the reporting period the total funds received by the CIO was £49,307 - the amount of £44,000 came directly to the CIO and £35,307 was received within the transfer of assets.

Designated Funds

St Pauls Church (Tithe)

A designated fund of £1,500 from July 2024 to build deeper relationships with children and their families through arts and craft clubs and day trips. During the reporting period the total funds received by the CIO was £1,500, which came directly to the CIO.

Restricted Funds

The Tudor Trust - Well-being Fund

A grant of £2,000 for staff and trustees to use for a retreat/team-building event. During the reporting period the total funds received by the CIO was £2,000, which was received within the transfer of assets. £943 has been spent on two staff away days, and an underspend of £1057 was transferred to general fund to be used for a further away days in 2025.

Luton Borough Council - Covid-19 Fund -
(Vaccination uptake) Access to Health

A grant of £9,000 from April 2022 to July 2022 to increase Covid vaccination amongst the Roma community. Extended to October 2023 as a wider Access to Health project. During the reporting period the total funds received by the CIO was £6,436, which was received within the transfer of assets. £6,388 has been spent on activities and workshops, and an underspend of £48 was transferred to reserves.

Bedfordshire & Luton Community
Foundation - Community Recovery Fund
(Roma Woman Champion)

A grant of £27,346 from April 2022 to March 2024 for a Roma Woman Champion to work closely with Roma women in the community to ensure they have access to information and tools, to empower them and help them access success.
Unfortunately, due to challenges in recruiting a suitable candidate in the first year, Luton Roma Trust only received the equivalent to year one grant (£11,692). During the reporting period the total funds received by the CIO was £8,554 – the amount of £2,346 came directly to the CIO and £6,208 was received within the transfer of assets.

The National Lottery Community Fund
(2022-2025)

A grant of £373,853 over three years from November 2022 to October 2025. During the reporting period the total funds received by the CIO was £222,200 - the amount of £157,747 came directly to the CIO and £64,453 was received within the transfer of assets.



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

NHS BLMK (Bedfordshire Luton Milton Keynes Integrated Care Board)

A grant of £20,073 from January 2023 to July 2023, extended to January 2024 for Luton Roma Trust in partnership with University of Bedfordshire to carry out an assessment of the access to healthcare needs of the Luton Roma community. During the reporting period the total funds received by the CIO was £10,037, which came directly to the CIO.

Heriot-Watt University

A restricted grant of £33,832 from February 2024 to January 2027 to work on implementing a project in regards of Roma people's healthy ageing. The main funder of the project is UK Research Council who has awarded Heriot Watt University, as the project manager, a total of £. 1.1. million to identify barriers faced by Roma people in accessing healthcare and other services in mid to later life. The project will then co-design new place-based 'Integrated Hubs' to better connect Roma people with culturally appropriate health, wellbeing and community resources which build upon existing expertise and assets within the community. During the reporting period the total funds received by the CIO was £11,277, which came directly to the CIO.

10 Analysis of net assets by fund

| | <u>Unrestricted Funds</u> | | | 2024 £ |
|---------------------|---------------------------|--------------------------|--------------------------|----------------|
| | General Funds £ | Designated Funds £ | Restricted Funds £ | |
| Fixed assets | - | - | - | - |
| Current assets | 49,780 | 841 | 99,826 | 150,447 |
| Current liabilities | - | - | (1,460) | (1,460) |
| | 49,780 | 841 | 98,366 | 148,987 |

11 Transactions with Related Parties, Trustee Benefits and Expenses

During the period ended 31st August 2023, expenses totalling £55 were reimbursed or paid directly to 2 Trustees



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

ANNEX

Until 31 August 2023 the Luton Roma Trust operated as a Registered Charity no 1160404

All assets and liabilities were transferred to a new Charitable Incorporated Organisation no 1202863 on that date

These pages following show summary financial details of the Registered Charity for the period 1 September 2022 until 31 August 2023 and are presented in this annex **for information only but do not represent part of the statutory accounts**

LUTON ROMA TRUST CHARITY NUMBER 1160404

STATEMENT OF FINANCIAL ACTIVITIES

FOR THE YEAR ENDED 31st AUGUST 2023

| | Note | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2023 £ |
|------------------------------------|------|----------------------------|--------------------------|-----------------------------|
| Income and endowments | | | | |
| Voluntary income | A1 | 31,511 | 203,065 | 234,576 |
| Activities for generating funds | | - | - | - |
| Investment income | | - | - | - |
| Total income | | 31,511 | 203,065 | 234,576 |
| Expenditure | | | | |
| Charitable activities | A2 | 24,058 | 127,179 | 151,240 |
| Total expenditure | | 24,058 | 127,179 | 151,240 |
| Net income/(expenditure) | | 7,453 | 75,886 | 83,339 |
| Transfers between funds | | 1,250 | (1,250) | - |
| | | 8,703 | 74,636 | 83,339 |
| Net movement in funds | | 8,703 | 74,636 | 83,339 |
| Reconciliation of funds: | | | | |
| Total funds brought forward | | 50,662 | 14,498 | 65,160 |
| Total funds carried forward | | 59,365 | 89,134 | 148,499 |

THESE FUNDS WERE TRANSFERRED TO CIO NO 12022863 ON 31 AUGUST 2023



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

LUTON ROMA TRUST CHARITY NUMBER 1160404

BALANCE SHEET

AS AT 31 AUGUST 2023

| | | Unrestricted Funds | Restricted Funds | Total Funds 2023 |
|---|------|-----------------------|----------------------|------------------------|
| | Note | £ | £ | £ |
| Fixed assets | | | | |
| Tangible assets | | - | - | - |
| Current Assets | | | | |
| Debtors | A3 | 136 | 712 | 848 |
| Cash at bank and in hand | | 59,229 | 89,671 | 148,900 |
| | | <u>59,365</u> | <u>90,383</u> | <u>149,748</u> |
| Creditors: Amounts falling due within one year | A4 | - | (1,249) | (1,249) |
| Net current assets / (liabilities) | | <u>59,365</u> | <u>89,134</u> | <u>148,499</u> |
| Net Assets | | <u>59,365</u> | <u>89,134</u> | <u>148,499</u> |
| Funds | | | | |
| Unrestricted Funds | A5 | 59,365 | - | 59,365 |
| Restricted Funds | A5 | - | 89,134 | 89,134 |
| Total Funds | | <u>59,365</u> | <u>89,134</u> | <u>148,499</u> |



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

LUTON ROMA TRUST CHARITY NUMBER 1160404

ADDITIONAL NOTES TO THE ACCOUNTS

FOR THE YEAR ENDED 31st AUGUST 2023

| A1 Voluntary Income | <i>Unrestricted Funds £</i> | <i>Restricted Funds £</i> | <i>Total 2023 £</i> |
|---------------------------------|-------------------------------------|-----------------------------------|-----------------------------|
| Gifts | 1,511 | - | 1,511 |
| Grants | 30,000 | 203,065 | 233,065 |
| | 31,511 | 203,065 | 234,576 |
| A2 Charitable Activities | <i>Unrestricted Funds £</i> | <i>Restricted Funds £</i> | <i>Total 2023 £</i> |
| Employment Costs | 19,214 | 86,147 | 105,361 |
| Payroll Admin | 218 | 637 | 855 |
| Staff Expenses | 20 | 115 | 135 |
| Transport | 57 | 392 | 449 |
| Training | 71 | - | 71 |
| Postage, Print & Stationery | - | 788 | 788 |
| Rent | (2,365) | 16,797 | 14,433 |
| Property Cost | 1,604 | 2,683 | 4,287 |
| Insurance | 218 | 1,130 | 1,348 |
| Office | 735 | 3,206 | 3,941 |
| Administration | 2,969 | 2,870 | 5,839 |
| Accountancy Cost | - | 475 | 475 |
| Operational Activity/Events | 608 | 11,366 | 11,974 |
| Other Costs | 641 | 573 | 1,216 |
| Trustee Expenses | 68 | - | 68 |
| Total Expenditure | 24,058 | 127,179 | 151,240 |



LUTON ROMA TRUST

Report of the Trustees and Financial Statements for the Year ending 31 August 2024

LUTON ROMA TRUST CHARITY NUMBER 1160404

ADDITIONAL NOTES TO THE ACCOUNTS

FOR THE YEAR ENDED 31st AUGUST 2023 (Continued)

| | | | | | |
|--|----------------------------|-------------------------------|-------------------------------|----------------------------------|----------------------------|
| A3 Debtors | | 2023 | | | |
| | | £ | | | |
| <i>Prepaid Insurance</i> | | 848 | | | |
| Total Debtors | | 848 | | | |
| | | | | | |
| A4 Creditors: liabilities falling due within one year | | 2023 | | | |
| | | £ | | | |
| <i>Pension Costs - NEST</i> | | 554 | | | |
| <i>Rates</i> | | 220 | | | |
| <i>Fee to Independent Examiner</i> | | 475 | | | |
| Total Creditors | | 1,249 | | | |
| | | | | | |
| A5 Funds | | | | | |
| | <i>Opening balance</i> | <i>Incoming resources</i> | <i>Outgoing resources</i> | <i>Transfers in the year</i> | <i>Closing balance</i> |
| | 2023 | 2023 | 2023 | 2023 | 2023 |
| | £ | £ | £ | £ | £ |
| <u><i>Unrestricted Funds</i></u> | | | | | |
| <i>Tudor Trust</i> | 27,046 | 30,000 | (21,739) | - | 35,307 |
| <i>General Fund</i> | 23,616 | 1,511 | (2,319) | 1,250 | 24,058 |
| Total Unrestricted Funds | 50,662 | 31,511 | (24,058) | 1,250 | 59,365 |
| | | | | | |
| <u><i>Restricted Funds</i></u> | | | | | |
| <i>BLCF - Stability Fund</i> | (4,798) | 12,000 | (7,202) | - | - |
| <i>BLCF - Citizen's Fund</i> | 3,450 | - | (2,200) | (1,250) | - |
| <i>The Tudor Trust - Well-being Fund</i> | 2,000 | - | - | - | 2,000 |
| <i>Luton Borough Council - Access to Health</i> | 4,500 | 4,500 | (2,564) | - | 6,436 |
| <i>BLCF - Community Recovery Fund</i> | 9,346 | - | (3,138) | - | 6,208 |
| <i>BLCF - Rent Costs</i> | - | 2,000 | (2,000) | - | - |
| <i>The National Lottery Community Fund</i> | - | 164,492 | (100,039) | - | 64,453 |
| <i>NHS BLMK (LRT & UoB)</i> | - | 20,073 | (10,036) | - | 10,037 |
| Total Restricted Funds | 14,498 | 203,065 | (127,179) | (1,250) | 89,134 |
| Aggregate of Funds | 65,160 | 234,576 | (151,237) | - | 148,499 |

Further details on the Luton Roma Trust charity number 1160404 can be obtained by contacting the Luton Roma Trust at Community House 15 New Bedford Road Luton LU1 1SA Telephone 01582 510709 or email office@lutonromatrust.org.uk