

RIZE & REACH

RELATE-RESINATE-FACILITATE-INNOVATE



Trustees' annual report for the period

From: 6th March 2024

To: 5th March 2025

Charity name: Rize and Reach

Charity registration number: 1205299

Objectives and activities

Summary of the purposes of the charity as set out in its governing document

The objects of the CIO are:

1. To act as a resource for young people up to the age of 25 living in Wales and Southwest England by providing advice and assistance and organising programmes of physical, educational and other activities as a means of:

a. Advancing in life and helping young people by developing their skills, capacities and capabilities to enable them to participate in society as independent, mature and responsible individuals;

b. Advancing education;

- c. Relieving unemployment;*
 - d. Providing recreational and leisure time activity in the interests of social welfare for people living in the area of benefit 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 of such persons; and*
 - e. Promoting physical and mental health.*
- 2. The promotion of social inclusion among elderly persons who are excluded from society on the grounds of old age or disability and assist them to integrate into society by providing:*
- a. Outings and social trips;*
 - b. Recreational facilities and opportunities suitable for the elderly; and*
 - c. Visits by volunteers to provide company to relieve loneliness.*

Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.

In financial year 2024/25 Rize and Reach took the opportunity after becoming a registered CIO to ensure its systems were robust enough to be able to service the needs of the recipients of its work and potential funders. This meant finding advice re policy best practice and receiving support to ensure the CIO is operating in line with the needs of the Charity Commission as well. The charity was set up with the support of a third sector organisation however, navigating the administration and developing processes and procedures was not included in that package of support.

Despite taking this time to ensure that all background systems, processes and procedures were in place Rize and Reach began to network in the local and surrounding areas of its charitable base to begin to highlight the services available and to find volunteers who were willing to help. This proved fruitful as the CIO now has a voluntary adviser, a quorate trustee board and two volunteers on the ground who were keen to begin to work.

Rize and Reach struggled to open a bank account and felt it was appropriate to not begin to undertake charitable activities until the CIO was compliant with the governance needs of the

Charity Commission as well as its understanding of the need for the accountability that a bank would bring in terms of reassuring the general public that all donations are handled appropriately and in line with best practice in terms of governance and the requirements of the SORP. A bank account was opened in September 2025, systems, policies and procedures were put in place regarding the accounts of the CIO and the trustee board is now trained in governance requirements and accounting best practice. As such moving into financial year 2025/26 Rize and Reach are now able to begin to operate in line with the aims, objects of its constitution and the requirement for its work to be in line with the public benefit.

Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit

The trustee board is quorate and has been trained to fully understand the need to operate in line with the guidance from the charity commission on public benefit. They will receive refresher training each year including any updates to governance requirements in this regard.

Contribution made by volunteers

Rize and Reach have been very fortunate in that despite delays with commencing full engagement with the communities it wishes to serve, that there are two volunteers ready to work on the ground and a volunteer advisor to support their governance needs. The trustee board have also been very committed to ensuring they possess full understanding of the role they've chosen to undertake and the need to adhere to policies, systems and procedures which places Rize and Reach in a strong position moving forward into its second year as a CIO. Rize and Reach is remarkably grateful to all its volunteers and the trustee board for the sheer amount of time and effort offered by each individual who has committed to assisting

the CIO to ensure that it is ready to begin to undertake work in line with its aims and objects alongside the public interest as well.

Achievements and performance

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.

Despite the CIO receiving nil income and expending no monies at all due to a lack of a bank account, there have been real moves on the part of Rize and Reach to ensure that all systems, policies and procedures are in place. In many respects this is a major achievement as it will ensure the sustainability of the CIO moving forward into future financial periods.

Strong links were forged with Newport City Council through their safeguarding lead and Cardiff Youth Foundation. This led to the strategy for Rize and Reach emerging organically as the needs of these organisations aligned well with the work Rize and Reach is able to provide. The CIO also began to network with Weston College to highlight the services which it aims to be able to offer in the next financial period. This has meant that the CIO is in a strong position in terms of being able to highlight its work and ensure that these organisations are aware of its ability to support the needs of young people and senior citizens in the local and surrounding areas.

Achievements against objectives set

As this was the first financial year of operation the CIO feels that it achieved its aims for this year in that it ensured its systems, policies and procedures were robust enough to service the requirements of the public, potential funders and the governance needs of the Charity Commission. The CIO feels that despite issues with opening a bank account they have

made great strides in terms of networking alongside the governance and policy achievements outlined above.

Financial review

Reasons for Holding Zero Reserves

Due to issues with opening a bank account the CIO took the decision to undertake no fundraising activities as there was the opportunity to have donation buckets but without a bank account Rize and Reach felt this was not in line with the need to consider the public benefit. As such the CIO has politely asked all willing organisations to please bear with them and there will still be the opportunity to have these donation buckets when able. Rize and Reach is incredibly grateful for the patience of its supporters.

Explanation of any uncertainties about the charity continuing as a going concern

Due to the important work in the background to ensure that all systems, policies and procedures are in place, alongside the ongoing networking with potential partners and funders, Rize and Reach is confident in their ability to sustain their work. As such there are no current uncertainties regarding the CIO continuing as a going concern.

Additional information (optional)

The charity's principal sources of funds (including any fundraising)

As outlined above the CIO had zero income and zero expenditure for financial year 2024/25 however, this was a decision taken by the trustee board to ensure that Rize and Reach could confidently service the needs of any funders and the public interest moving forward.

A description of the principal risks facing the charity

Rize and Reach is aware of the current global situation in terms of ever shrinking funding pots. However, its volunteers and trustee board are incredibly passionate about the CIO and its proposed work. As such despite zero income and expenditure Rize and Reach feels confident about its ability to continue to function.

Structure, governance and management

Type of governing document: Constitution

How is the charity constituted? CIO Foundation Model

Reference and administrative details

Charity Name: Rize and Reach

The charity is not known by or referred to as any other name

Charity registration number: 1205299

Charity Principle Address: 158 Cape Yelchow, Newport, NP20 2SN

Trustees in place in 2024/25

Wesley Cunliffe

Jason Reed

Aisling Donovan

The company has taken advantage of the small companies' exemption in preparing the report above.

The trustees declare that they have approved the trustees' report (including directors' report) above.

Signed on behalf of the charity's trustees/directors

Signature(s)	W, Cunliffe	
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Full name(s)	Wesley Cunliffe	
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Position (for example Secretary, Chair, etc)	Trustee	
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Date	28/01/2026
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