
Section 1 : Legal and Administrative Information

Charity Name: Monkton Bluefriars Charitable Trust
Any other name the charity is known by: Bluefriars
Charity Commission registered number: 1057332
For the financial year beginning on: 01.09.2020
For the financial year ending on: 31.08.2021
Charity's principal address: 1 Church Cottages
Monkton Combe
Bath BA2 7HB
Phone: 01225 723583 Email: info@bluefriars.org.uk
Web: www.bluefriars.org.uk

Description of the charity's trusts

Governing Document

The Monkton Bluefriars Charitable Trust deed was signed on 10th June 1996, and was registered on 5th August 1996.

Objects of the charity

(Trust Deed paragraph 4.1) The Trustees shall hold the Trust Fund upon trust that they shall from time to time pay or apply the income thereof and may at any time or times (if and when they think fit) apply the whole or any part or parts of the capital thereof for the purposes of promoting

(a) the physical education and development of the pupils of Monkton Combe School by encouraging and facilitating the sport of rowing through the provision of facilities equipment and financial support including sponsorship of individuals or crews training for and participating in competitive events where such individuals represent the School or Monkton Bluefriars Boat Club

(b) the physical education and development of students of such other education establishments as the Trustees shall in their absolute discretion determine by encouraging and facilitating the sport of rowing through the provision of facilities equipment and financial support including the sponsorship of individuals or crews training for and participating in competitive events.

Specific investment powers

(Trust Deed paragraph 4) The Trustees may treat [contributions] as the income of the Trust Fund or as an addition to the capital of the Trust Fund.

(Trust Deed Schedule paragraph 1 - Power of Investment) Any monies to be invested may be applied in the purchase or acquisition of such shares stock funds securities land buildings chattels or other property of whatever nature and wherever situate and whether involving liabilities or producing income or not or in the making

<p>Monkton Bluefriars Charitable Trust Charity Commission registered number: 1057332 Trustees' Annual Report for Year Ending 31 August 2021</p>
--

of such loans with or without such security as the Trustees think fit so that the Trustees shall have the same powers in all respects as if they were the beneficial owners absolutely entitled.

Professional adviser

Investment Manager: Mr Simon Temple-Pedersen, J M Finn and Co, 31 Great George Street, Bristol, BS1 5QD Phone: 0117 921 0550

Section 2 : Trustees and Governance

Name of Trustee	Dates acted if not for whole year	Names of directors of any corporate Charity trustee at the date of this report	Name of person (or body) entitled to appoint trustee (if any)
Fergus Murison - Chairman Toby Saunders – Treasurer Peter Bossom - Secretary Genevieve Bailhache-Graham Julian Bewick Julius Caesar John Clark Rowley Douglas MBE Alex Partridge Steve Williams OBE Alexander Leflaive-Manley	Appointed 25/10/2020		

Trustee selection method

New Trustees are selected by invitation of the existing trustees. People with long-standing strong links to the trust are invited to become trustees.

Names of the charity's custodian trustees - None

Section 3 : Public Benefit

The trustees have complied with their duty to have due regard to the Charity Commission's guidance on public benefit in exercising their duties. The following section includes a summary of the distribution of funds and other benefits during the year.

Section 4 : Activities and Achievements

The trustees are pleased to record the continuing support received by the trust from a large number of former members of Monkton Combe School Boat Club, many of whom give regularly to the trust by means of Gift Aid donations. These regular gifts enable us to plan our grant making at the beginning of each year. We also receive occasional donations from members of local rowing clubs who wish to support rowing amongst children in their clubs. The trustees bear these wishes in mind when making grants to the junior sections of these clubs.

Donations (including Gift Aid claimed) amounted to **£11,689** this year.

Summary of Grants made

Financial support to rowing **at Monkton Combe School** amounted to: **£13,339**.

- The trust provided the school with rowing equipment amounting to **£13,200**.
- The trust paid costs of crews attending events amounting to **£139**. This figure includes support given for athletes attending the main annual training camp. The trust pays 100% of the bill for athletes that would otherwise be prevented from attending for financial reasons.

The Tom Mildinhall Prize, worth £100, given in memory of Lt Tom Mildinhall, who was killed in action in Iraq, was awarded at a cost of: **£100**. However, this award will not be paid until the 2021-22 charity tax year.

Other financial support to **rowing clubs other than Monkton Combe School** amounted to: **£600**.

Financial support to **athletes representing England** amounted to: **£1,000**.

Encouragement

Much of the work of the trust is not financial. The trustees aim to help in practical ways, e.g. by coaching, supporting and helping with the administration of rowing activities, both at Monkton Combe School Boat Club and in neighbouring clubs with junior sections. Many local children have been encouraged and inspired by work done by the Great Britain athletes who are trustees, Rowley Douglas MBE (Olympic Gold Medallist in 2000), Steve Williams OBE (World Champion in 2000 and 2001, 2002, 2003, 2005, 2006 and Olympic Gold Medallist in 2004 and 2008.) and Alex Partridge (World Champion in 2005, 2006, 2009, Olympic silver medal 2008, Bronze medal 2012). All three of these athletes started their rowing at Monkton Combe School.

We organised the annual Monkton Bluefriars Small Boats Head Race in October. In common with other rowing races in the UK, athletes pay to enter the race and profits go to the trust.

We publish an annual newsletter which is distributed widely. The text of the newsletter is put on our website.

Notes about grants at Monkton Combe

The Trust makes a grant to Monkton Bluefriars Boat Club for the annual training camp. The grant allows the club charge some athletes less for the camp, so that athletes that could not otherwise attend are able to attend. Parents who can afford to do so are encouraged to (and do) pay more than their share, to enable others to take part.

Funds were also used to enable boys and girls to take part in several rowing events during the year.

Notes about grants elsewhere

Planning work, support and encouragement for other activities outside Monkton Combe School was undertaken during the year.

We remain committed to help in the development of the new rowing club at Great Marlow School, where a former oarsman from Monkton Combe School is teaching and coaching rowing.

Section 5 : Policies

Reserves Policy

The founding gift, along with several large donations received in later years are treated as capital. Sufficient funds are added to capital each year from income, with the aim of preserving and if possible enhancing investment income. When donors request that gifts are to be treated as capital, the trustees bear such requests in mind.

Grant-making policy

Our highest priority is to make grants to individuals and groups who are members of Monkton Combe School Boat Club, to help with training and competition costs. We also aim to make grants to students including children from other schools and clubs. We also give equipment when funds are available.

Investment Selection policy

We consult our investment manager regularly. He makes the day to day decisions about our investments, and he reports to us. We have so far had no disagreements with his actions.

Review of major risks

Most of the accounting and other work of the charity are undertaken by one trustee (the Treasurer). Computerised accounts are backed up regularly.

Section 5 : Signature and Declaration

Declaration

I declare, in my capacity of charity trustee that:
the trustees have approved the report above; and
have authorised me to sign on their behalf

Signature

Full name

Toby Saunders

Fergus Murison

Position (eg Secretary, Chair, etc.)
Chairman

Treasurer

Date (original signed on)